

Building an Encore Nation

October 28-30, 2014

#EncoreNation



ENCORE2014:
Building an Encore Nation



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Encore 2014 is the premier national gathering of leaders who share a belief in the power of encore talent to improve society.

While many see our aging society as a looming problem, we view it as a solution poised to happen. Those in and beyond midlife represent a powerful source of talent, with the accumulated skills, experience and wisdom to tackle many of our society's most urgent challenges. By embracing this opportunity, we can transform what is often portrayed as a zero-sum prospect into a win-win for individuals and society, not only now, but for generations to come.

This vision is becoming a reality for more people in more places every day. Our 2014 national survey highlighted the persistence of purpose as a driving motivation in the second half of life. More than 4.5 million Americans age 50 to 70 are working in encore roles today, and another 21 million are preparing for their own encores.

An urgent question is how to accelerate this shift and deepen its social impact – how to help society take full advantage of this unprecedented human-resource windfall.

As we gather in Arizona for Encore 2014, we will explore and celebrate the accomplishments of this emerging movement, and grapple with the challenges standing in the way of greater impact. As leaders from local communities, nonprofits, higher education, business, philanthropy, government and media, our mandate is to achieve a full return on the experience dividend.

During our time in Arizona, I invite you to ask hard questions as you share ideas, visit with colleagues and make new connections through plenary sessions, workshops and cluster conversations. We'll be doing all of this in some spectacular settings. There is no better place for this exploration than Maricopa County, Arizona, where encore talent is being mobilized to address social needs through philanthropic leadership, a deep community-wide approach, and a broad array of programs.

Together, let's build an "Encore Nation" where social-purpose work is a widespread reality and cultural aspiration for the second half of adulthood, much the way leisure-based retirement was a goal for previous generations.

Marc Freedman, Founder and CEO
Encore.org

THE ENCORE MOVEMENT

The encore movement aims to solve society's biggest social problems by harnessing the experience of people in midlife and beyond. It includes the legions of people in or aspiring to transition into their encores, the people and organizations working to enable encores for others and the social-purpose organizations engaging encore talent for impact.

An "encore" or "encore career" is continued work in the second half of life that combines social impact, purpose and often, continued income. While many people see their encore work as a "career," others associate the career language with the "achieving" stage of life. For that reason, we talk about an encore role, work or activity – or simply "an encore." Use whichever language feels most comfortable to you.

ENCORE.ORG

Encore.org is building a movement to tap the skills and experience of those in midlife and beyond to improve communities and the world. Originally called Civic Ventures, Encore.org was founded in 1997 by social entrepreneur Marc Freedman and grew out of a desire to transform the aging of America – one of the most significant demographic shifts of the 21st century – into a powerful, positive source of individual and social renewal.

Encore.org is spearheading efforts to engage millions of people in later life as a vital source of talent to benefit society. Our vision is to establish encore as a new social norm – for society and for individuals.

We have three core areas of work to elevate, enable and expand the encore vision:

- I. ELEVATE:** Change the cultural narrative about the second half of life and establish a new norm around later-life work and impact.

Activities include communications, media relations, storytelling, speaking, thought leadership and knowledge development.

- II. ENABLE:** Increase demand for encore talent and achieve greater social impact in more communities and sectors.

Activities include catalyzing others to create encore opportunities, operating the Encore Fellowships Network as a "proof point" and developing partnerships for sector-specific initiatives in areas such as higher education and encores for youth.

- III. EXPAND:** Build and connect a robust and growing movement of individuals and organizations working to advance the encore movement across sectors and geographies.

Activities include a national conference, smaller convenings, knowledge exchanges, leadership development and the Encore Network, which brings together organizations to learn from each other and act in concert.

Throughout its history, Encore.org has looked for creative ways to tap the power of experience to improve the lives of young people. In coming years, new initiatives will deepen generational ties and mobilize encore talent to create a better future for future generations.



	PRE-CONFERENCE: Sunday – Tuesday	Location
Pre-Conference	Encore Innovation Fellows <i>(by invitation)</i> Sunday 10/26, starting at 4:00 pm (through Tuesday 10/28)	San Pedro
	Encore Network Leadership <i>(by invitation)</i> Monday 10/27, starting at 1:00 pm (through Tuesday 10/28)	San Pedro
	Pre-Conference Welcome and Dinner <i>(by invitation)</i> Monday 10/27, 6:30-9:00 pm	Second Floor Terrace
	Encore Fellowships Network <i>(by invitation)</i> Tuesday 10/28, 1:00-4:30 pm	Dolores
	Encore.org Board Meeting <i>(private)</i> Tuesday 10/28, 11:00 am-4:00 pm	Xavier
	Purpose Prize Honorees: Past and Present Tuesday 10/28, 1:00-4:00 pm	Joshua Tree
	Higher Education Meet and Greet <i>(all higher ed welcome)</i> Tuesday 10/28, 3:00-4:00 pm	Cavetto

AGENDA: TUESDAY 10/28

4:00-5:00 pm	Newcomers Event	Second Floor Terrace
5:00-6:30 pm	Conference Meet and Mingle Dinner	Hotel Courtyard
5:30-7:00 pm	Sponsor Dinner/Reception <i>(invitation only)</i>	Tempe Center for the Arts
7:00-10:30 pm	Buses depart from hotel at 6:30	

Purpose Prize Ceremony	THE PURPOSE PRIZE®: 2014 AWARDS CEREMONY	Tempe Center for the Arts 700 W. Rio Salado Parkway, Tempe
	Ceremony honoring the 2014 winners – six people over 60 who are changing the world through their encores.	
	Transportation and Schedule	
	<ul style="list-style-type: none"> - Buses depart from the Tempe Mission Palms lobby, starting at 6:30 pm. - Doors open at 7:00 pm for the 7:30-8:45 pm ceremony, which will be followed by a dessert reception. - Buses return to the hotel from 9:00-10:30 pm. 	

6:30-8:30 am	Breakfast Buffet available	Mission Grille Restaurant
8:30-10:00 am		Palm Ballroom

Plenary	OPENING: Mobilizing Encore Talent as a Force for Social Impact
	<p>Chiku Awali African Dance Ensemble, founded by Alexandreena Dixon</p> <p>Andy Goodman, Conference Facilitator Welcome: Judy Mohraz, Board Chair, Encore.org Opening Remarks: Marc Freedman, CEO and Founder, Encore.org</p> <p>Disruptive Aging: A Force for Social Impact</p> <ul style="list-style-type: none"> - Jo Ann Jenkins, Chief Executive Officer, AARP <p>The John W. Gardner Talk From Insoluble Problems to Breathtaking Opportunities: The Living Legacy of John W. Gardner</p> <ul style="list-style-type: none"> - Carol Larson, President, David and Lucile Packard Foundation

10:30-11:45 am

Workshops	ENCORE NATION-BUILDING: Exchange of Ideas, Models and Strategies	
	Concurrent workshops to learn from encore leaders and experts. <i>See pages 13-19 for descriptions and presenters.</i>	
	1 Higher Education: Emerging Ideas and Practices	Cavetto
	2 Experience Matters: A Model for Increasing Encore Demand	Palm F
	3 Encores for Impact: Expanding Opportunities to Create a Better Future for Children and Youth	San Pedro
	4 Encore 101: Understanding the Encore Movement, Past, Present and Future (for first-time conference attendees)	Joshua Tree
	5 Sustainable Encore Organizations: Thinking Beyond the Foundation	Palm C
	6 Media Panel: How to Become a Go-To Media Source on the Encore Movement	Xavier
7 Encore Talent Exchange: Emerging Human Resources Trends, Best Practices and Programs	Dolores	

12:00-1:15 pm

LUNCHEON: The 2014 Eisner Prize for Intergenerational Excellence
Award presentations by Michael Eisner, Founder and CEO, The Tornante Company, and Trent Stamp, Executive Director, The Eisner Foundation. Two \$100,000 cash awards will be presented in the following areas:
<ul style="list-style-type: none"> - Innovation in Intergenerational Solutions, awarded to Bridge Meadows - Lifetime Achievement in Intergenerational Advocacy, awarded to The Intergenerational Schools

1:30-3:00 pm

Small Groups

CLUSTER CONVERSATIONS: Opportunities and Questions — How can we Deepen Social Impact Through Encore?

Neither traditional presentations nor breakouts, these 21 “meet-ups” will bring people together in small groups to discuss what matters most to them around advancing the encore idea and impact. Emerging themes will be gathered and compiled from all clusters. *For a list of conversation topics and leaders, see pages 21-24.*

3:30-5:00 pm

Palm Ballroom

Plenary Panel

What’s Next for the Encore Movement? Exploring Different Perspectives

The encore movement is growing, not only in size, but also in the range of opportunities for encore seekers and in visions for deploying encore talent as a powerful new source of human capital. During this plenary session, a panel of leaders and experts will explore the current landscape and discuss where they see the movement headed.

Moderator

- **Farai Chideya**, author, journalist, professor and podcast host of “One with Farai” on Public Radio International

Panelists

- **Ysabel Duron**, Founder and Executive Director of Latinas Contra Cancer
- **Chris Farrell**, Journalist and author
- **Ann MacDougall**, President, Encore.org
- **Erwin Tan**, Director, Senior Corps for the Corporation for National and Community Service
- **Amber Wiseley**, Intel Corporation’s Retirement Design Strategist for the Americas

6:00-9:00 pm

Buses depart from hotel at 6:00

Special Evening Event

Encore Evening in the Arizona Desert

Desert Botanical Garden
201 N. Galvin Parkway, Phoenix

Enjoy an evening of networking, dinner, music, stargazing and desert exploration at the beautiful Desert Botanical Garden. You won’t want to miss the great Southwestern food and the prickly pear margaritas!

Transportation

- Buses depart from the Tempe Mission Palms lobby starting at 6:00 pm.
- Buses return to the hotel from 8:30-9:30 pm.

6:30-8:30 am

Breakfast Buffet available

Mission Grille Restaurant

8:30-10:00 am

Palm Ballroom

Plenary

IGNITE: What’s Your Big Idea for Accelerating Encore’s Impact?

Arizona School for the Arts — Chamber Singers, directed by Dana Bender

Changing the Culture of Aging

- **Paul Irving**, President, Milken Institute

Nine Big Ideas

- Fast-paced, Ignite-style talks by encore leaders who will present their ideas for deepening social impact through existing and new approaches, resources and innovations. *See page 25 for list of presenters.*

What’s YOUR big idea?

10:15-11:30 am

Palm Ballroom

Closing Plenary

A PATH APPEARS: Transforming Lives, Creating Opportunity

Introduction

- **Lester Strong**, Vice President and CEO of AARP Experience Corps

Keynote

- **Nicholas Kristof**, Pulitzer Prize-winning *New York Times* columnist and co-author of *A Path Appears: Transforming Lives, Creating Opportunity*

Closing Comments

11:30-1:00 pm

Grab ‘n Go Lunch

Cloister

PRESENTERS



Farai Chideya brings the human experience alive in media. A fiction and nonfiction author, reporter and broadcaster, she has interviewed billionaires and politicians, white supremacists and murderers. She believes that embracing our shared humanity is crucial to journalism. A former on-air reporter and host for ABC News, CNN and NPR, she hosts and produces the “One with Farai,” podcast with Public Radio International, intimate conversations with cultural and intellectual visionaries. She is the author of *Innovating Women* and is writing a nonfiction book on how to find career and personal happiness in a time of economic volatility. Chideya is a Distinguished Writer in Residence at New York University’s Arthur L. Carter Journalism Institute.

Ysabel Duron is Founder and Executive Director of Latinas Contra Cancer. A cancer survivor herself, she founded Latinas Contra Cancer, in 2003 to address the void in services for Latinos around issues of cancer including support services and education, particularly in the low-income, Spanish-speaking community. Duron, a television journalist for over 39 years, was inducted into the National Association of Hispanic Journalists Hall of Fame in 2009. The San Jose Silicon Valley Business Journal named her a Women of Influence in 2008. She was named one of the most Influential Bay Area Latinos in 2005 by the San Francisco Hispanic Chamber. In 2003, she won the Janet Gray Hayes Award for her meritorious work as a journalist and as an advocate for Latinas with breast cancer. Duron was awarded The Purpose Prize in 2013 by Encore.org.



Michael D. Eisner has been a leader in the American entertainment industry for four decades. He began his career at ABC, where he helped take the network to number one in prime time, daytime and children’s television. In 1976, he became president of Paramount Pictures, turning out a string of critically acclaimed blockbuster films. In 1984, Michael assumed the position of Chairman and CEO of The Walt Disney Company, transforming it into a global media empire valued at \$100 billion. In 2005, Michael founded The Tornante Company; a privately held company that invests in, acquires and operates companies in media and entertainment. In 1996, Michael and his wife Jane founded The Eisner Foundation, which provides access and opportunity for children and the aging in the United States.

Chris Farrell is senior economics contributor at Marketplace, American Public Media’s nationally syndicated public radio business and economic program. He is also an economics commentator for Minnesota Public Radio. An award-winning journalist, Farrell is a columnist for *Bloomberg Businessweek*, *Next Avenue* and the *Minneapolis Star Tribune*. He has written for a number of other media outlets. The author of several books, his latest is *Unretirement: How Baby Boomers are Changing the Way We Think About Work, Community and the Good Life*.



Marc Freedman is CEO and Founder of Encore.org (formerly Civic Ventures). He spearheaded the creation of Experience Corps (now AARP Experience Corps), mobilizing Americans over 55 to improve the education of low-income children, and The Purpose Prize, an annual award of up to \$100,000, for social innovators in the second half of life. He is author of *The Big Shift: Navigating the New Stage Beyond Midlife*, which *The New York Times* calls “an imaginative work with the potential to affect our individual lives and our collective future.” His earlier books include *Encore: Finding Work That Matters in the Second Half of Life*, *Prime Time: How Baby Boomers Will Revolutionize Retirement and Transform America* and *The Kindness of Strangers*.



Andy Goodman is a nationally recognized author, speaker and consultant in the field of public-interest communications. Along with *Storytelling as Best Practice*, he is author of *Why Bad Ads Happen to Good Causes* and *Why Bad Presentations Happen to Good Causes*. He also publishes a monthly journal, *free-range thinking*, to share best practices in the field. Goodman has been consulting for good causes since 1998, and in 2008 he co-founded The Goodman Center with Lipman Hearne to reach more nonprofits, foundations and government agencies through online classes. He serves as a Senior Advisor for Encore.org and is on the advisory boards of VolunteerMatch and Great Nonprofits.

Paul H. Irving is President and a member of the board of the Milken Institute. In addition to executive management, Irving leads global programs on public health. Irving's work to improve aging societies has been featured in outlets such as PBS Newshour, *Forbes*, CBS, NBC, CNN, *The Los Angeles Times*, *USA Today* and *The Wall Street Journal*, and was recognized when he received the Janet L. Witkin Award from Affordable Living for the Aging in 2014. His book, *The Upside of Aging - How Long Life is Changing the World of Health, Work, Innovation, Policy, and Purpose*, was published in 2014.



Jo Ann Jenkins is Chief Executive Officer of AARP, the world's largest nonprofit, nonpartisan membership organization dedicated to social change and helping people 50 and over improve the quality of their lives. Prior to her appointment as CEO, Jenkins served as Chief Operating Officer for the organization, leading an enterprise-wide strategy to define priorities, align processes and allocate resources in support of Americans 50-plus and their families. Jenkins, a proven innovator, joined AARP in 2010 as President of AARP Foundation, AARP's affiliated charity. She led that organization's far-reaching development and social impact initiatives. Under her leadership, the foundation's overall donor base increased by 90 percent over two years.

Nicholas Kristof, a two-time Pulitzer-Prize-winning columnist for *The New York Times*, is an extraordinary thinker, human rights advocate and chronicler of humanity. A seasoned journalist, he has traveled all over the world offering a compassionate glimpse into global health, poverty and gender in the developing world. Crossing over into activism and hoping his dispatches will resonate with people, Kristof has gone beyond reporting to give a voice to the voiceless. He and his wife, Sheryl WuDunn, were the first married couple to win a Pulitzer in journalism (awarded in 1990) and are the co-authors of the best-selling *Half the Sky: Turning Oppression into Opportunity for Women Worldwide*. Their current book is *A Path Appears: Transforming Lives, Creating Opportunity*.



Carol S. Larson is President and CEO of the David and Lucile Packard Foundation, a position she has held since January 2004. She is responsible for the overall management of the Foundation and its grantmaking activities. In 2013, the Foundation awarded over \$287 million in grants domestically and internationally in the program areas of Conservation and Science; Population and Reproductive Health; and Children, Families and Communities. Previously, Larson served as the Packard Foundation's vice president and director of programs. Prior to joining the Foundation, she was a partner in a Los Angeles law firm specializing in civil litigation. She also worked in the nonprofit sector on behalf of persons with developmental disabilities.

Ann MacDougall is President of Encore.org. She has had a long career spanning both legal and operating roles and working both in the US and Europe. She was Chief Operating Officer of Acumen Fund, a global venture capital fund focused on goods and services for low-income customers. MacDougall oversaw Acumen's worldwide operations, strategy and expansion. Before joining Acumen, she was a partner at PricewaterhouseCoopers, where she rose through the ranks to become General Counsel of PwC US and a member of the Management Committee. In 2013, MacDougall was a Fellow in the Harvard Advanced Leadership Initiative, a year-long program to prepare experienced executives to take on new challenges in the social sector.



Judy Jolley Mohraz is the chair of the Board of Directors for Encore.org. Previously she was the first president and CEO of Virginia G. Piper Charitable Trust. Prior to joining the trust, she was President of Goucher College in Towson, MD. She received her bachelor's and master's degrees in history from Baylor University and her doctorate from the University of Illinois at Urbana-Champaign. Mohraz serves on the Council on Foundation's board of directors, the advisory board of the Morrison Institute at Arizona State University, the board of Greater Phoenix Leadership and the advisory board of the William Clements Center for Southwest Studies at Southern Methodist University. She previously chaired the Council on Foundation's Committee on Public Policy and served as President of the Arizona Grantmakers Forum.



Trent Stamp has been Executive Director of The Eisner Foundation since 2008. He is responsible for all aspects of the foundation's management, including strategy, execution, operations, evaluation, marketing, and the awarding of The Eisner Prize. Additionally, he teaches Nonprofit Management and Leadership at the Price School at USC, works as a consultant to the Committee on the Arts at The Aspen Institute, serves as a member of the Board of Advisors for The Center on Philanthropy & Public Policy and is on the Board of Directors of Southern California Grantmakers, where he chairs the Audit Committee. Prior to joining The Eisner Foundation, Trent was the founding President of Charity Navigator, from April 2001 through January 2008.

Lester Strong, Vice President and CEO of AARP Experience Corps, has served as a leader in educational entrepreneurship and development. He was the Chief Development Officer for the BELL (Building Educated Leaders for Life) Foundation, which also provides tutoring and mentoring services to underserved children. His efforts have doubled the foundation's endowment and propelled expansion from three to five cities: Baltimore, Boston, Detroit, New York and Springfield, MA. He spent 25 years in the television industry as an executive, producer, reporter and anchor. His work earned him a host of national and regional awards, including five regional Emmy awards and a White House commendation from President Ronald Reagan.



Erwin Tan is the Director of Senior Corps for the Corporation for National and Community Service (CNCS). In this role he oversees the RSVP, Foster Grandparent (FGP) and Senior Companion (SCP) volunteer programs that engage adults age 55 and over in service opportunities in their communities. A board-certified internist and geriatrician, Tan previously held several positions at John Hopkins University in Baltimore, Maryland: as Assistant Professor of Medicine at the Johns Hopkins School of Medicine, attending physician in the Division of Geriatric Medicine and as a researcher at the Johns Hopkins Center on Aging and Health. While at John Hopkins, he co-authored and authored numerous articles on the positive health outcomes for older adult volunteers.

Amber Wiseley is Intel Corporation's Retirement Design Strategist for the Americas. She is responsible for the design and compliance of Intel's retirement programs in the United States, Canada and Latin America. Wiseley has been a co-leader in developing Intel's industry-leading Encore Career program, including its highly successful Encore Fellows Program. She has worked in Shanghai and held various finance roles at Intel. Wiseley holds a B.S. in Finance from California State University at Chico and a MBA from Arizona State University.





1 Higher Education: Emerging Ideas and Practices

Encore.org is taking a new approach to innovating in the higher education sector. In this next phase of catalyzing change, EncoreU focuses on engaging senior leadership to create age-friendly institutions. In this session, we will discuss what is happening in your institutions, learn from each other and participate in a focus group for understanding how the whole system is changing.

In this session, you will:

- Gain insight into EncoreU's new strategy aimed at sector-wide change
- Participate in a deeper discussion around your observations related to institutional awareness of the compelling social issues of a demographic shift, your current institutional encore initiatives, challenges you are facing, opportunities that exist and ideas about what makes an EncoreU-friendly institution
- Walk away with information on how to move this strategy forward
- Gain access to the results from a 2014 Penn Schoen Berland and Encore survey, focused on how higher ed institutions could tailor programming that would be most helpful to those looking for a transition to an encore career

Barbara Vacarr is Director of Encore.org's Higher Education Initiative and a former college president, adult educator and psychologist. Over the course of her 27-year career she has developed programs for adult and non-traditional learners to develop and transform themselves as they strengthen the connections between their learning, their living and their livelihoods.

Judy Goggin served as Vice President at Encore.org for 12 years, and in this role led development of new initiatives including the Encore College and Next Chapter initiatives. She served for 18 years at Elderhostel (now Road Scholar) as Vice President for U.S. Programs.

2 Experience Matters: A Model for Increasing Encore Demand

The goal is simple: connect supply and demand. To meet the welfare, education, health-care and environmental demands in our community, Arizona nonprofits and civic agencies enlist the support of community talent. Demand on these agencies is growing, even as financial resources have been reduced and the population of traditional volunteers is diminishing. On the supply side, consider that in 2011 the first of Maricopa County's estimated million baby boomers turned 65. National research shows that boomers are the healthiest, best educated generation to ever move through their 50s and 60s.

Currently, a gap exists between the desire for meaningful work in the second half of life and the traditional role of volunteers in the nonprofit sector. Through a robust training, coaching and networking model for nonprofits, Experience Matters is supporting over 250 nonprofit organizations in creating meaningful positions for skilled, experienced talent.

In this session, you will learn how to:

- Utilize best practice models to engage nonprofits
- Help nonprofits create projects that lead to successful placement
- Train nonprofits to assess their readiness to receive skilled talent
- Create position descriptions, interview and screen
- Develop programs to coach and facilitate nonprofits in implementing best practices in volunteer engagement

Nora Hannah is Chief Executive Officer of Experience Matters, a groundbreaking initiative to engage the time, talent and experience of adults age 50+ to help meet the growing needs in the public and nonprofit sectors.

Sally Clifford is Program Director for Experience Matters and is responsible for developing and delivering programs that effectively engage skilled community talent with nonprofit organizations throughout Maricopa County.

3 Encores for Impact: Expanding Opportunities to Create a Better Future for Children and Youth

Nonprofits and encore programs around the country are successfully engaging experienced adults in paid and unpaid roles educating and developing young people, especially vulnerable children and youth. This is creating opportunities for encore-seekers to have an impact on the future, demonstrating the power of encore human capital. Our challenge is to expand this use of encore talent to transform the prospects of children and youth, and in the process begin to shift the narrative about generational relationships away from conflict to the vital connections across generations.

In this session, we will:

- Learn about programs and roles that are leveraging encore talent to make a difference for children and youth
- Consider how these and other efforts can be brought to more communities
- Begin to create a community of practice around encores for children and youth

Moderator:

Phyllis Segal is in her encore career as Vice President of Encore.org. In this role, she leads initiatives aimed at understanding and expanding encore talent as a resource to meet society's most pressing needs.

Panelists:

Naila Bolus is President and CEO of Jumpstart, a national early education organization that recruits and trains college students and community members to serve preschool children in low-income neighborhoods.

Jere Brooks King is a marketing consultant and nonprofit volunteer in the San Francisco Bay Area. During 2012, she completed an Encore Fellowship at Abilities United, a nonprofit based in Palo Alto, CA, that provides services to children and adults with developmental disabilities.

Emily Merritt is Director of Intergenerational Initiatives for the Alliance for Children and Families. She is leading a new initiative to bring encore talent into the Alliance's 500-agency network, and in the process, change the way they think about and use encore talent.

Bill Newlin is a ReServist serving as Project Coordinator for PrepNow, a program to make attending and graduating from college an explicit goal for youth in foster care. In addition to working with the city agency that oversees children services and foster care agencies, Bill provides support to other ReServists who serve as "success mentors," supporting foster-care parents and caregivers.

4 Encore 101: Understanding the Encore Movement, Past, Present and Future

(for first-time conference attendees)

Are you new to encore? Wondering what this encore movement is all about? Are you just beginning to explore how encore talent might benefit your community or your organization? Come hear the history of the encore movement from Encore.org's founder, Marc Freedman.

Baby boomers are inventing a new phase of work – work not only for continued income, but for the promise of greater meaning and the chance to do something that matters. It's one of the most significant trends of the new century, and the biggest change in the American work force since the women's movement. Encore pioneers hold the potential to transform America – and create a better society for future generations.

In this session, you will:

- Get to know Encore.org and its founder, Marc Freedman
- Learn about the history of retirement and the birth of the encore movement
- Be inspired by stories of encore pioneers
- Hear why the growing encore movement is critical for creating a better world
- Engage in a Q&A with Marc

Marc Freedman is CEO and Founder of Encore.org (formerly Civic Ventures). He spearheaded the creation of Experience Corps (now AARP Experience Corps), mobilizing Americans over 55 to improve the education of low-income children, and The Purpose Prize, an annual award of at least \$100,000 for social innovators in the second half of life. He is author of *The Big Shift: Navigating the New Stage Beyond Midlife*, among other works.

Facilitator:

Eunice Lin Nichols is the Director of The Purpose Prize program at Encore.org. Prior to this role, she was Director of Encore and Intergenerational Programs at Aspiranet and led the San Francisco Bay Area team of Experience Corps (now AARP Experience Corps) for 11 years.

5 Sustainable Encore Organizations: Thinking Beyond the Foundation

Grassroots encore organizations need to expand their paid staff and marketing. Foundation funding is tougher and tougher to get. Corporate sponsors are looking for big projects with bottom-line impact. The volunteers who got you this far are maxed out. It's tough to sustain – much less grow – an encore organization.

While there are no silver bullets or guaranteed formulas, Encore Network organizations have many success stories to share and a wide range of income sources. Join us for a lively discussion and new ideas about strengthening your funding.

In this session, you will:

- Learn about a variety of income sources funding encore programs
- Hear how successful organizations that have diversified their funding
- Benefit from “the wisdom in the room” of peers facing the same challenges

Moderator:

Betsy Werley is Director of Network Expansion at Encore.org and formerly the first Executive Director of The Transition Network.

Panelists:

David Alley is the Executive Director of SHIFT and Chairman and Owner of Designs for Learning, a consulting firm serving Minnesota charter schools, non-profits and small businesses.

Susan Collins is Executive Director of The Transition Network. She uses her experience in strategic planning, operations, sales and marketing to grow the organization and promote its mission to members throughout the country.

Marilee Dal Pra is Vice President of Programs for Virginia G. Piper Charitable Trust; she oversees Piper Trust's community initiatives and strategic program development.

Dave Garvey is the Director, Nonprofit Leadership Program at the University of Connecticut and the founder of Encore!Hartford.

Laura Traynor is the Director of ReServe New York, which leverages the skills and talents of people 55+ for social good.

6 Media Panel: How to Become a Go-To Media Source on the Encore Movement

The encore movement is gaining global traction. As the media document this growing social movement, they need expert, on-the-ground sources and encore advocates. Encore.org VP Marci Alboher will moderate a lively conversation with prominent media personalities about how they view the “encore beat” as well as how they cultivate sources and what they (and their editors) are looking for in a “story.”

In this session, you will learn:

- Common media questions about the encore movement
- How to get the attention of a journalist in an information-saturated digital environment
- Why the media love stories of “real people”
- Where journalists look for “experts” — and what makes them come back to expert sources
- How to tell your story in a way that resonates with the media
- How writing, speaking and social-media activities can turn you into a leading voice in the encore movement

All media in attendance at the conference are encouraged to attend and be part of the conversation.

Moderator:

Marci Alboher is the VP of Marketing and Communications for Encore.org. She is a former *New York Times* columnist and blogger and the author of *The Encore Career Handbook*.

Panelists:

Kerry Hannon is a best-selling author, journalist and speaker. She is an expert columnist for *The New York Times*, AARP, *Forbes* magazine and PBS Next Avenue.

Farai Chideya is an award-winning author, journalist, professor and podcast host of “One with Farai,” on Public Radio International.

Ysabel Duron is the founder and CEO of Latinas Contra Cancer. She was a television news reporter and anchor for 43 years and was a 2013 Purpose Prize Winner.

David Bornstein is a journalist and author who focuses on social innovation. He co-authors the Fixes column in *The New York Times* Opinionator section, which explores and analyzes potential solutions to major social problems.

7 Encore Talent Exchange: Emerging Human Resources Trends, Best Practices and Programs

Making it easier for people to move from their aspiration to an encore career focused on social impact can be accelerated by engaging the key institutions on both the supply and demand sides of the talent equation. New human resources practices are emerging at organizations with employees exploring an encore transition – at for-profit companies, educational institutions, government agencies and unions – and the social-purpose organizations that need talent. This session will provide insight into how human-resource professionals from organizations on both sides of the talent equation are revolutionizing their practices in the development and acquisition of encore talent.

Note: the moderator will also highlight findings from the recent Conference Board survey and profiles.

Moderator:

Leslye Louie is the national director of the Encore Fellowships Network. She was a General Manager and Vice President at the Hewlett Packard Company during her 20-year career in the high-tech industry.

Panelists:

Lisa Taylor is an HR Consultant and President of the Challenge Factory. Lisa identifies the aging workforce as a catalyst for innovation and challenges corporate leaders to initiate talent revolutions within their organizations.

Gregg Broome has worked in the field of human resources for more than 30 years and is acting Chief Human Resources Officer at Single Stop USA, where he is helping build the next level of HR infrastructure for this national organization.

Mike Sabatino is a certified financial planner and Managing Director of Financial Planning and Education at McGraw-Hill Federal Credit Union with an expertise in financial wellness for encore-seekers.

Amber Wiseley is Intel Corporation’s Retirement Design Strategist for the Americas and co-leader of the company’s innovative encore pilots and breakthrough Encore Fellows Program.

CLUSTER CONVERSATIONS



1

Awakening the Encore Spirit: Shifting Expectations from Retirement to Proactive Life and Work

Janet M. Hively is an Encore Entrepreneur and co-founder of Pass It On Network. After a career in city planning and administration, she earned her Ph.D. in 2001 at the age of 69, with a dissertation on "Productive Aging in Rural Communities."

2

Boomers Back at School: How Can Public Universities Facilitate Encore Transitions?

Phyllis Moen is Professor of Sociology at the University of Minnesota, where she co-directs the Flexible Work and Well-Being Center, part of a larger research network supported by the National Institutes of Health and Centers for Disease Control aimed at studying work redesigns.

3

Creating Encore Hiring Demand in America's Nonprofits

David Garvey is the Director of the University of Connecticut and the Department of Public Policy's Nonprofit Leadership Program and Encore!Hartford. He has over 20 years of experience as a practitioner, editor, researcher, teacher and education designer in the nonprofit field.

4

Creating Shared Identity in Social Movements: What Does this Mean for Encore?

Adria Goodson directs Hunt Alternatives' Prime Movers program, serves as an executive leadership coach, and is an adjunct lecturer on the faculty of Harvard University's Graduate School of Education. For over 15 years, Adria has worked with foundations and nonprofits to help them strategically support leaders who are seeking to create a more just society and world.

5

Crossing Borders to Solve Serious Social Problems: Exploring a Model for Responding to Trauma in Communities

Eberhard Riedel is Founder and Director of Cameras Without Borders. He is a psychoanalyst and photographer and has a longstanding interest in the relationships between psychological trauma and serious social problems.

6

Encore Service: A Pathway for Community Impact

Barbara Raynor is Managing Director of Boomers Leading Change in Health, a grassroots effort dedicated to improving the health and access to health care of people living in the Metro Denver area.

7 Encore Work that Benefits Children and Youth: Discussing Best Practices, Unique Benefits and Success Stories

Peggy Goldberg is the Volunteer Advisor for AARP Experience Corps National Program. She provides guidance and consultation on best practices in volunteer policy and management for the network of 17 AARP Experience Corps programs in 22 cities across the country.

Emily Merritt is Director of Intergenerational Initiatives for the Alliance for Children and Families, leading a new initiative to both bring encore talent into the Alliance's 500-agency network and help change the way our communities think about and utilize encore talent.

8 Entrepreneurial Approaches to Alleviating Poverty: Perspectives from The Purpose Prize

Jim Emerman is Executive Vice President at Encore.org. His current portfolio encompasses Encore.org's thought leadership and storytelling work, including research, The Purpose Prize, Encore Stories and efforts to engage scholars and opinion leaders around the encore idea.

Patricia Foley Hinnen is founding CEO of Colorado-based Capital Sisters International, where she sells zero-interest bonds to fund microfinance organizations that make \$100 business loans to women in developing countries. She has 30 years of experience in international development and microfinance.

Beverly Jo Santicola is co-founder and Executive Director of the Center for Rural Outreach & Public Services, Inc. (CROPS) in Houston. She teaches problem-solving and grant-writing to rural and urban youth so they can create their own solutions to community problems.

William H. Abrashkin is Executive Director of Springfield, MA, Housing Authority, where he runs programs that open avenues to academic success for poor children and their families. Prior to joining SHA, he was a judge at a western Massachusetts housing court.

9 Exploring the Economic Impact of Encore Workers

Amy St. Peter is Human Services and Special Projects Manager for the Maricopa Association of Governments. She oversees regional human services planning and more than \$30 million in funding for one of the fastest growing regions in the country.

10 Getting Out of the Life/Work Rut: Perspective Transformation for Purposeful Engagement

David Alley is the Executive Director of SHIFT and Chairman and Owner of Designs for Learning, a consulting firm serving Minnesota charter schools, non-profits and small businesses.

Kate Schaefer is a licensed psychologist, coach and consultant with a passion for aligning individual talents with meaningful work. Her work focuses on midlife and mid-career transitions, leadership development and encore careers.

11 How Can Encore Resonate Across Race, Class and Culture?

Terry Kaelber is Director of Community Engagement Projects for United Neighborhood Houses of NY. Terry directed New York's participation in the Community Experience Partnership, a national initiative to demonstrate the impact older adults can have to drive change and strengthen their communities.

Stacey Easterling is Director of Program Development and Growth at Encore.org. Her work focuses on launching activities to embed encore talent to improve the future for young people and on expanding the reach of Encore.org into new and diverse communities. Previously she was a Program Executive for Atlantic Philanthropies.

12 I Love My Home and My Community: How Can I Stay as I Age?

Susan Poor is the Founder and a Board Member of San Francisco Village. She consults on a wide range of aging-related policy and strategy issues with non-profit and government agencies, for-profit companies and funders.

13 Imagining Life After Leadership: Encore Careers for Nonprofit Leaders

Stephanie Clohesy is Founder and Principal Consultant of Clohesy Consulting. Since 1992, she has provided a variety of services to foundations, families, nonprofits and businesses focused on social good and social justice.

14 Can New Legal Structures Help Social Enterprises/Entrepreneurs Succeed?

Dave Roll is Founder of the Lex Mundi Pro Bono Foundation. He brings more than 35 years of experience in law, government and business to his efforts to deliver critical pro bono legal services to the world's leading social entrepreneurs.

15 Making Encore Sexy: Messages that Enhance the Appeal to Potential Encore Seekers

Susan Collins is Executive Director of The Transition Network. She uses her experience in strategic planning, operations, sales and marketing to grow the organization and promote its mission to members throughout the country.

Helen Dennis is a nationally recognized leader on issues of aging, employment and retirement. She has been president/chair of five non-profit organizations and was a delegate to the 2005 White House Conference on Aging. She is co-author of *Project Renewment®: The First Retirement Model for Career Women*.

16 Sustaining Innovation through New Age vs. Age-Old Policies

Laura Traynor is Director of ReServe NY, which leverages the skills and talents of people 55+ for social good. Before joining ReServe, Laura was the Executive Director of The Center for Aging in Place.

17 The Semicolon: Valuing the Time Between 'Then' and 'Now'

Carol Vecchio is a Life Design and Career Counselor and founder of the nonprofit Centerpoint Institute for Life and Career Renewal. She is the author of *The Time Between Dreams: How to Navigate Uncertainty in Your Life and Work*.

18 The Spiritual Heart of Encore: Aligning the Soul's Purpose With Action in the World

Karen Beal is Program Manager for Jesuit Volunteer EnCorps, a program of JVC Northwest that facilitates transformative opportunities for intentional service, community and spiritual formation for older adults committed to social and ecological justice.

Helen Pitts co-leads the formation and expansion of Jesuit Volunteer (JV) EnCorps, a program of JVC Northwest that facilitates transformative opportunities for intentional service, community and spiritual formation for older adults committed to social and ecological justice.

Linda Watt is an Encore Innovation Fellow exploring faith-based connections, and is a juror for The Purpose Prize. She was the Chief Operating Officer of The Episcopal Church from 2007 to 2011 and U.S. Ambassador to Panama prior to that position.

19 Using Social Media to Grow the Encore Movement

Aanchal Dhar is Marketing and Communications Associate for Encore.org. In this role, she works on Encore.org's digital content, marketing and social media initiatives. Aanchal comes to Encore.org with a background in public health and digital marketing.

Marcos Salazar is Co-Founder and Executive Director of Be Social Change. He is a social entrepreneur, career and life coach, business strategist, consultant, speaker and community builder.

20 What's Age Got to Do with It? How Ageism Affects Everyone

Ashton Applewhite is an author, speaker and activist for ThisChairRocks.com. She is the voice of *Yo, Is This Ageist?* and has been recognized by *The New York Times* as an expert on ageism.

21 Why Encore Matters to Millennials

Daniel Friel is Special Assistant for Encore.org. He came to Encore.org with a research background in psychology and has worked as a social-media analyst, survey designer and freelance writer.

Janet Oh, independent consultant, has been working in the San Francisco Bay Area nonprofit sector for the last 12 years, focusing on projects that use the talents of youth and of adults in the second half of life.

What's Your Big Idea for Accelerating Encore's Impact?

In this fast-paced Ignite-style session, nine people will present their "Big Idea for Accelerating Encore Impact" in five minutes with 20 slides that automatically transition after 15 seconds. It's meant to be fun and promote creative thinking about how to expand the encore movement. Encore 2014 "Big Idea" Presenters include:

Barbara Chandler Allen is Founder and President of Fresh Artists. In 2010, she won The Purpose Prize for her encore work engaging children as philanthropists to create artwork that brings in donations that pay for desperately needed art supplies for inner-city Philadelphia schools.

Ashton Applewhite is an author, speaker and activist for ThisChairRocks.com. She is the voice of *Yo, Is This Ageist?* and has been recognized by *The New York Times* as an expert on ageism.

Rebecca Conwell is a Tulane University Encore Innovation Fellow with over 25 years of experience working with nonprofits. Rebecca launched her own encore career in 2011 when she left her position at Tulane University to work on social venture endeavors and manage a local political campaign.

David Harrison is chair of the new nonprofit Boomerang Giving, which seeks to redirect senior discounts to nonprofits at point of sale. He is also chair of Washington Nonprofits, a statewide nonprofits association, and is an emeritus senior lecturer at the University of Washington.

Gary Hollander is the founding CEO of Diverse and Resilient, an LGBT public health organization in Wisconsin. Psychologist, educator, consultant, and coach, Gary loves to tell a good story and to foster community engagement.

Evan McKittrick is Director of Strategic Initiatives and Partnerships for Teach For America and leads its national Service and Engagement Initiative. Based out of Seattle, Evan has spent his entire career pursuing social justice through teaching and nonprofit partnerships.

Emily Merritt is Director of Intergenerational Initiatives for the Alliance for Children and Families, leading a new initiative to both bring encore talent into the Alliance's 500-agency network and help change the way our communities think about and utilize encore talent.

Marcos Salazar is Co-Founder and Executive Director of Be Social Change. He is a social entrepreneur, career and life coach, business strategist, consultant, speaker and community builder.

Katherine Wilcox is the Executive Director of the EnCorps STEM Teachers program where she leads the non-profit in its mission to deliver excellent STEM education to all children in disadvantaged communities.

Encore.org is deeply grateful to the people and organizations that have made this gathering possible.

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PHOTOS – Past Purpose Prize winners who inspire us by living encore everyday

Cover
Elizabeth Huttinger, 2013
Bhagwati Agrawal, 2012
Ysabel Duron, 2013
Wanjiru Kamau, 2011
Ed Nicholson, 2013
Susan Burton, 2012

Inside cover - Violet Little, 2013
Page 3 - Barbara Young, 2013
Page 8 – Judy Cockerton, 2012
Page 12 – Thomas Cox, 2012
Page 20 - Barbara Chandler Allen, 2010
Back cover - Catalino Tapia, 2008

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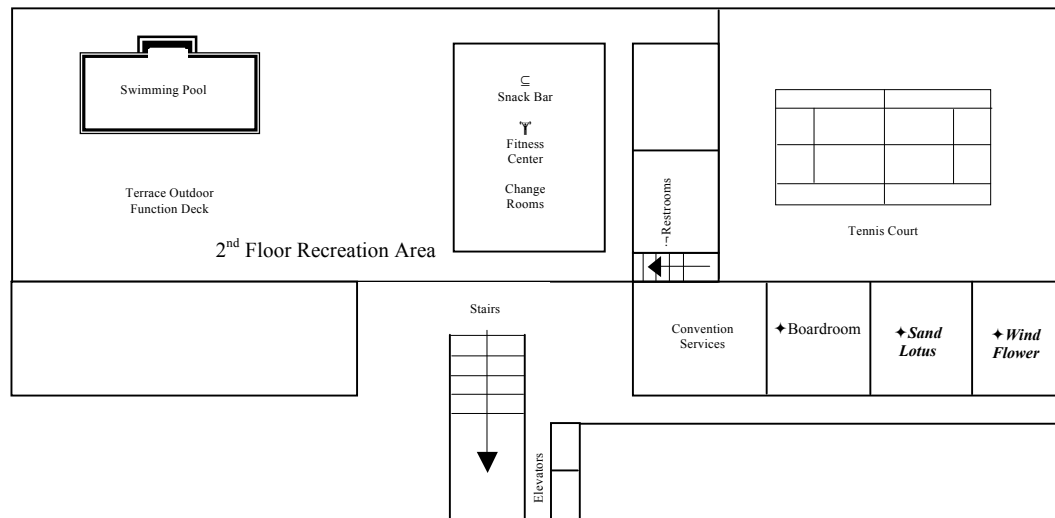
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