



Encore2016

Celebrating the Encore Effect

San Francisco | February 9-11

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Celebrating the Encore Effect. Encore2016 will explore the future of the encore movement and commemorate two decades of accomplishments:

20 Years of Experience Corps. Experience Corps recruits adults aged 50+ as tutors and mentors for young children who need extra support to become skilled readers. The program began in 1996 as a five-site demonstration program of the National Senior Service Corps (now Senior Corps), a national service program for older adults. Inspired by a concept paper John Gardner wrote in 1988, Marc Freedman, Founder and CEO of Encore.org, co-created the original program with Dr. Linda Fried, Dean of Columbia University's Mailman School of Public Health. In 2011, Experience Corps became part of AARP and is now AARP Foundation Experience Corps. With 2,000 members serving students in 22 cities across the country, AARP Foundation Experience Corps is the largest AmeriCorps program engaging adults 50+ to serve young children.

10 Years of The Purpose Prize. The Purpose Prize® tells a story about social entrepreneurship and innovation in the second half of life. It was created in 2005, with the first prizes awarded in 2006, to demonstrate that experienced adults comprise an undiscovered, and largely untapped, continent of solutions to an array of pressing societal challenges. Over the past decade, Encore.org received nearly 10,000 Purpose Prize nominations, recognized more than 500 people, including nearly 100 winners and hundreds of fellows, and has awarded more than \$5 million in prizes to social entrepreneurs working in fields ranging from disaster relief and easing childhood trauma to financial empowerment, workers' rights and community gardens that feed the hungry.

Encore2016 convened by



Lead conference sponsor



Join the conversation: #Encore2016

#Encore2016 is the premier global gathering of leaders and allies who share a belief in the power of experienced talent to improve society.

Many of us have spent the past two decades anticipating the intersecting demographic and longevity revolutions – and the vast opportunities they present.

That moment has now arrived. And those of us gathered for these few days are at the vanguard of writing a new story of life's third chapter – one that leverages talent, wisdom and experience to leave the world better than we found it.

Momentum is building.

So many of you have laid the foundation for this shift in your own work. And the world is catching on and catching up. In films like "The Intern," touting "Experience Never Gets Old"; in former CEOs like Michael Bloomberg and Bill Gates using their second and third acts to create a lasting legacy. With public figures like Oprah, leveraging her celebrity to promote her school for girls.

We need to make the most of this moment, and this momentum. If we don't act with a sense of urgency, we will miss the opportunity offered by the giant boomer population, and all those Gen Xers coming quickly on their heels.

We all know that that the once-dominant notion of a leisure-based retirement is on the wane. Few individuals can afford it, and society can't sustain it. Still, there's no lock on what will replace that vision. We know that working longer is part of the story, and an important part. But there's an opportunity to do even more: to create something more purposeful and more powerful. For a new vision to take hold – one characterized by using our accumulated skills and life experience to help fix pressing social problems and pass something better on to the next generation.

I see #Encore2016 as a rallying cry, a time to come together and ensure that the generation known for its idealism uses its extended productive years to reconnect with those aspirations and create a new life paradigm. It's a time to "disrupt aging," as our close partner AARP is already doing, and in ways that benefit all ages.

In this gathering, you'll meet people who are having an impact themselves, and simultaneously working to create programs, pathways and initiatives for collective impact. And I promise that you'll leave here even more committed to action – and with a collection of new allies and collaborators in that journey.

The ripe moment is here. Let's not waste it. And let's not waste the experience dividend ready to be realized.

Marc Freedman, Founder and CEO
Encore.org

THE ENCORE MOVEMENT

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 ultimate goal is to create a better future for young people and future generations.

We approach our work through three strategic lenses:

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

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

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

Throughout our history, Encore.org has sought creative ways to tap the power of experience to improve the lives of young people. In 2016, Encore.org plans to launch a new national campaign to inspire a massive infusion of human capital by individuals in their 50s, 60s, 70s and beyond to improve the prospects of low-income and vulnerable youth, in ways that harness the unique assets of experienced adults.

For more information, visit encore.org.

AGENDA OVERVIEW

PRE-CONFERENCE *(by invitation)*

Tuesday, February 9 – See page 4 for times of sessions.

InterContinental

CONFERENCE

Tuesday Evening, February 9

InterContinental

5:30-6:30 pm **Attendee Meet and Greet Gathering**
6:30-9:00 pm **OPENING DINNER: INNOVATION AND THE ENCORE EFFECT**

Wednesday Morning, February 10

InterContinental

7:00-8:30 am **Breakfast and Conversation Tables**
8:30-9:45 am **PLENARY: GROWING ENCORE ACROSS THE U.S. AND GLOBALLY**
10:15-11:30 am **THEMATIC PLENARIES:** Four sessions to explore key conference themes with national and international experts

Wednesday Afternoon, February 10

InterContinental

11:45-1:00 pm **LUNCHEON: THE 2015 EISNER PRIZE FOR INTERGENERATIONAL EXCELLENCE**
1:15-2:45 pm **WORKSHOPS 1-8:** Eight sessions with encore leaders and experts
3:00-4:15 pm **PLENARY: DISRUPTING AGING AND THE LONGEVITY OPPORTUNITY**

Wednesday Evening, February 10

SFJAZZ Center

5:30-10:00 pm **THE PURPOSE PRIZE 10TH ANNIVERSARY CELEBRATION**

Thursday Morning, February 11

InterContinental

7:00-8:30 am **Breakfast and Conversation Tables**
8:30-9:45 am **WORKSHOPS 9-16:** Eight sessions with encore leaders and experts
10:15-11:45 am **CLOSING PLENARY: THE FUTURE OF INNOVATION**
11:45 am **Conference closes**

POST-CONFERENCE

Thursday Afternoon, February 11

1:30-4:00 pm **San Francisco Architecture Walking Tour by Rick Evans** (optional)
1:30-4:30 pm **Life Planning Network Meeting**

AGENDA: TUESDAY

PRE-CONFERENCE: TUESDAY

InterContinental San Francisco

Pre-Conference

9:00 am-5:00 pm

- **Encore Network Leadership** *(by invitation)*

Sutter, 5th Floor

2:00-5:00 pm

- **Purpose Prize Honorees: Past and Present** *(by invitation)*
- **Encore Fellowships Network** *(by invitation)*
- **Encore Campaign for Children and Youth** *(by invitation)*

Telegraph Hill, 4th Floor

Mission, 3rd Floor

Union Square, 3rd Floor

5:00-5:30 pm

- **Rapid-Fire Intro:**
Encore Campaign for Children and Youth *(all welcome)*

Union Square, 3rd Floor

TUESDAY EVENING

5:30-6:30 pm

Attendee Meet and Greet Gathering

Grand Ballroom Foyer, 3rd Floor

6:30-9:30 pm

Grand Ballroom, 3rd Floor

Opening Plenary and Dinner

OPENING DINNER: Innovation and the Encore Effect

Conference Facilitator: Andy Goodman, Director, The Goodman Center | @GoodmanCenter

Performance:

IMPACT Repertory Theatre

Introduced by Jamal Joseph, Executive Artistic Director and Founder | @jjpantherbaby

State of the Movement:

Marc Freedman, Founder and CEO, Encore.org | @marc_freedman

In Conversation with Marc Freedman:

Tim Brown, CEO and President, IDEO | @tceb62

Dinner Conversation

After-Dinner Reflections:

Justin Kauflin, Jazz Pianist and Composer | @JustinKauflin

Introduced by Kate Williams, Employment Immersion Program Manager, Lighthouse for the Blind and Visually Impaired

7:00-8:30 am

Breakfast

Grand Ballroom, 3rd Floor

Conversations

Join a Conversation Table at breakfast from 7:15-8:15 am. Meet attendees from your geographic area, explore a topic of interest or just start your day with a shared cup of coffee or tea. Tables 1 through 20 have an assigned topic, some with volunteer hosts; tables 21 through 25 are available for you to suggest something new; and the remainder of the tables are open seating. *Visit page 38 for preliminary list of topics for Wednesday morning.*

To suggest a table topic, please visit the registration desk.

8:30-9:45 am

Grand Ballroom, 3rd Floor

Plenary

PLENARY: Growing Encore Across the U.S. and Globally

Ann MacDougall, President, Encore.org | @annmacdougall

Talk: Ai-jen Poo, Director, National Domestic Workers Alliance, and Co-director, Caring Across Generations campaign | @aijenpoo

Panel: How is the growing interest in encore being integrated by business, communities and institutions globally?

Panelists:

- **Michael Hodin**, Executive Director, Global Coalition on Aging (moderator) | @MWHodin
- **Mitch Besser**, Medical Director and Founder, mothers2mothers, South Africa
- **Jackie Wong**, CEO Temasek Trust, Singapore
- **Anja Paehlke**, Körber Foundation, Germany

10:15-11:30 am

Thematic Plenaries

THEMATIC PLENARIES: These four plenaries will explore key conference themes with national and international experts. Each will be a unique and dynamic experience. *See pages 12-16 for more detailed descriptions.*

A. Navigating a Changing Media and Communications Landscape

Union Square, 3rd Floor

- **Marci Alboher**, Vice President, Marketing and Communications, Encore.org (Moderator) | @heymarci
- **Farai Chideya**, Author and Journalist | @farai
- **Debbie Galant**, Publisher, Midcentury Modern Magazine; Associate Director, Center for Cooperative Media at Montclair State (NJ); Co-Producer, The Chemo Files | @debgalant
- **Courtney Martin**, Co-Founder, Solutions Journalism Network | @courtwrites
- **Sree Sreenivasan**, Chief Digital Officer, Metropolitan Museum of Art | @sree

B. Purposeful Aging: Model for a New Life Course

Telegraph Hill, 4th Floor

- **Paul Irving**, Chairman, Center for the Future of Aging, Milken Institute (moderator) | @MIAging
- **Rabbi Laura Geller**, Senior Rabbi, Temple Emanuel of Beverly Hills
- **Kerry Hannon**, best-selling author, journalist, speaker and expert columnist | @KerryHannon
- **Jody Holtzman**, SVP, Enterprise Strategy and Innovation, AARP
- **Phil Pizzo**, Founding Director Stanford Distinguished Careers Institute; Former Dean, Stanford School of Medicine | @PhilPizzoMD

C. The Power and the Promise of Mobilizing Encore Talent for Youth

InterContinental Ballroom C, 5th Floor

- **John Gomperts**, President and CEO, America's Promise Alliance (Moderator) | @JohnGomperts
- **Michael Funk**, Director, After School Division, California Department of Education
- **Eunice Lin Nichols**, Purpose Prize Director, Encore.org
- **Lester Strong**, Vice President of External Affairs and Experience Corps, AARP Foundation | @ExperienceCorps

D. Social Innovation, Social Impact: Exploring Encore Successes and Gaps

Sutter, 5th Floor

- **Katherina Rosqueta**, Founding Executive Director, the Center for High Impact Philanthropy, University of Pennsylvania (Moderator) | @ImpactSP2
- **David Bornstein**, Co-founder, Solutions Journalism Network | @dnbornstein
- **William Shutkin**, CEO, Presidio Graduate School | @shutkinpres

11:45 am-1:00 pm

Grand Ballroom, 3rd Floor

Luncheon

LUNCHEON: The 2015 Eisner Prize for Intergenerational Excellence

Award presentations by Michael D. Eisner, Founder and CEO, The Tornante Company, and Trent Stamp, CEO, The Eisner Foundation. Two \$100,000 cash awards will be presented in the following areas:

- **Lifetime Achievement in Intergenerational Advocacy**, awarded to Generations United
- **Innovation in Intergenerational Solutions**, awarded to L.A. Kitchen

1:15-2:45 pm

Workshops 1-8

WORKSHOPS: Concurrent workshops provide informal opportunities to learn with encore leaders and experts. See pages 18-26 for more information and descriptions.

- | | |
|--|----------------------------------|
| 1. AARP and Encore: Celebrating Successful Partnerships | <i>Nob Hill, 4th floor</i> |
| 2. Collaborate or Co-blab-orate?
Building Skills for Breaking Silos Across Sectors | <i>Laurel Hill, 4th floor</i> |
| 3. Common Purpose:
Engaging Millennials and Gen Xers in the Encore Movement | <i>Howard, 5th floor</i> |
| 4. Encore Campaign for Children and Youth:
Learning from Models for Large-Scale Social Change | <i>Sutter, 5th floor</i> |
| 5. Encore Fellowships as a Human Capital Strategy
for the Social Sector | <i>Twin Peaks, 4th Floor</i> |
| 6. Encore Talent Works:
Build Demand with a New Toolkit | <i>Telegraph Hill, 4th Floor</i> |
| 7. Encore Innovation in Higher Education:
Meeting the Demographic Challenges | <i>Cathedral Hill, 4th Floor</i> |
| 8. Using Storytelling to Spread Your Message
and Showcase Your Impact | <i>Union Square, 3rd Floor</i> |

3:00-4:15 pm

Grand Ballroom, 3rd Floor

Plenary

PLENARY: Disrupting Aging and the Longevity Opportunity

Local Perspective: AARP Experience Corps Bay Area Partner

Monique Brinson, Principal, Sankofa Academy, Oakland Unified School District

Talk: Disrupting Aging

Jo Ann Jenkins, CEO, AARP | @JoAnn_Jenkins

Introduced by Marc Freedman, Founder and CEO, Encore.org | @marc_freedman

John Gardner Talk: The Longevity Opportunity – Changing the Equation for Future Generations

Laura Carstensen, Founding Director, Stanford Center on Longevity

Introduced by Carol Larson, President and CEO, The David and Lucile Packard Foundation

5:30-10:00 pm

Purpose Prize Ceremony

Purpose Prize Ceremony

Transportation schedule to SFJAZZ Center:

- Buses depart from InterContinental lobby at 5:30 pm.
- Doors open at 6:00 pm; ceremony starts at 6:30 pm.
- Buses return to the hotel from 8:30-10:00 pm.

SFJAZZ Center
201 Franklin Street
San Francisco

MASTER CLASS: CELEBRATING 10 YEARS OF THE PURPOSE PRIZE @SFJAZZ

10th anniversary celebration and award ceremony honoring the 2015 winners — six social innovators over 60 whose encores are changing the world:

- **Laurie Ahern**, Disability Rights International | @LaurieDRI
- **Patricia Hinnen**, Capital Sisters International
- **Jamal Joseph**, IMPACT Repertory Theatre | @jjpantherbaby
- **Dr. Samuel Lupin**, Housecalls for the Homebound
- **Rev. Belle Mickelson**, Dancing with the Spirit
- **Laura Safer Espinoza**, Fair Food Standards Council | @FairFoodSC

Co-hosts:

- **Ysabel Duron**, Founder and Executive Director, Latinas Contra Cancer | @ysabelduron
- **Jane Pauley**, veteran journalist and television anchor | @JanePauleyTODAY

Speakers:

- **Cathy Choi**, Director of Programs, The Eisner Foundation
- **Jim Emerman**, Executive Vice President, Encore.org | @jemerman
- **Marc Freedman**, CEO and Founder, Encore.org | @marc_freedman
- **Jo Ann Jenkins**, CEO, AARP | @JoAnn_Jenkins
- **Sherry Lansing**, CEO, The Sherry Lansing Foundation
- **Eunice Lin Nichols**, Director, The Purpose Prize
- **Chris Oechsli**, CEO, The Atlantic Philanthropies
- **Kimon Sargeant**, Vice President of Human Sciences, John Templeton Foundation
- **Sree Sreenivasan**, Chief Digital Officer, Metropolitan Museum of Art | @sree
- **Trent Stamp**, CEO, The Eisner Foundation
- **Dennis White**, President & CEO, MetLife Foundation

Performance:

- **Justin Kauflin**, Jazz Pianist and Composer | @JustinKauflin

Post-ceremony dinner reception

7:00-8:30 am

Breakfast Conversations

Grand Ballroom, 3rd Floor

Join a Conversation Table at breakfast from 7:15-8:15 am. Meet attendees from your geographic area, explore a topic of interest or just start your day with a shared cup of coffee or tea. Tables 1 through 20 have an assigned topic, some with volunteer hosts; tables 21 through 25 are available for you to suggest something new; and the remainder of the tables are open seating. *Visit page 39 for preliminary list of topics for Thursday morning.*

8:30-9:45 am

Workshops 9-16

WORKSHOPS: Concurrent workshops provide informal opportunities to learn with encore leaders and experts. *See pages 28-36 for more information and descriptions.*

- | | |
|---|----------------------------------|
| 9. Charting Your Encore Journey | <i>Nob Hill, 4th Floor</i> |
| 10. Community Foundations as Encore Leaders: Models from Four Places | <i>Laurel Hill, 4th Floor</i> |
| 11. Experienced Adults Wanted: Models for Encore Engagements with Youth | <i>Sutter, 5th Floor</i> |
| 12. Faith and the Encore Movement: Strengthening Alignment between Spiritual and Earthly Purpose | <i>Cathedral Hill, 4th Floor</i> |
| 13. Going Global: The International Encore Landscape | <i>Marina, 3rd Floor</i> |
| 14. Does Encore Engagement = Encore Impact? An Emerging Research Agenda | <i>Telegraph, 4th Floor</i> |
| 15. New Strategies for Engaging Boomers | <i>Union Square, 3rd Floor</i> |
| 16. University Retirees: Exploring Encore Models Within and Across Campuses | <i>Twin Peaks, 4th Floor</i> |

10:15-11:45 am

Grand Ballroom, 3rd Floor

Closing Plenary

CLOSING PLENARY: THE FUTURE OF INNOVATION

Performance: Dancing with the Spirit

Introduced by Rev. Belle Mickelson, Founder and Executive Director

Encore Fast Pitch: High-energy, rapid-fire presentations by five organizations doing innovative work to engage encore talent at scale. *Learn more about the Fast Pitch on page 40.*

Finalists:

- **Asha Chandra**, Program Manager, City of Fremont Human Services | @Fremont_CA
- **Ryan Frederick**, CEO and Founder, Smart Living 360 | @SmartLiving360
- **Edgar Salazar**, CTO and Co-Founder, Bridge for Billions | @Bridge4Billions
- **Laura Traynor**, Director, ReServe | @Re_Serve
- **Jill Violet**, Founder, Substantial | @jillviolet

Judges:

- **Kriss Deiglmeier**, CEO, Tides | @kdeiglmeier
- **Phil Pizzo**, Founding Director Stanford DCI, and Former Dean, Stanford School of Medicine | @PhilPizzoMD
- **Katherina Rosqueta**, Founding Executive Director, The Center for High Impact Philanthropy | @ImpactSP2

Talk: **Eric Liu**, Founder and CEO, Citizen University; Executive Director, the Aspen Institute Citizenship and American Identity Program | @ericpliu

Closing Remarks: **Marc Freedman**, Founder and CEO, Encore.org | @marc_freedman

POST CONFERENCE

1:30-4:00 pm

Walking Tour

San Francisco Architecture Walking Tour by Rick Evans

Join Rick Evans, a local architecture expert, for this walking tour. You will see some of the great buildings of San Francisco and learn how local history reveals itself in a collection of remarkable structures, streets and public spaces. Rick was recently named one of Travel + Leisure's "World's Greatest Tour Guides." For more information, visit www.architecturesf.com.

Meet in the hotel lobby at 1:30 pm to walk to the Galleria Park Hotel where you'll join Rick Evans for this 2½ hour tour.

Cost is \$40/person. Sign up at the registration desk.

1:30-4:30 pm

Life Planning Network Meeting*Telegraph Hill, 4th Floor*

LPN Post Conference

**From Inspiration to Application:
Translating the Encore Effect into Your Personal and Professional Life**

Life Planning Network (LPN) members and conference attendees are invited to attend this LPN-produced post-conference session that will take place at the InterContinental San Francisco, immediately following Encore2016.

Led by expert Life Planning Network facilitators, this post-conference session will help you consider next steps for applying conference insights and ideas to your personal, professional and community life, and enable you to determine the support needed to successfully accomplish your goals.

For more information, visit the LPN website at www.lifeplanningnetwork.org.

Facilitators:

- **Sara Zeff Geber**, Founder, LifeEncore
- **Elizabeth Bussman Mahler**, President, Chesapeake Chapter, Life Planning Network



*RV Care-A-Vanners working with students at Habitat for Humanity,
Jacksonville, FL, 2002*

PLENARIES A-D
WEDNESDAY, FEBRUARY 10
10:15-11:30 am

These plenaries allow you to explore key conference themes with national and international experts. Each will be a unique and dynamic experience.

- A. Navigating a Changing Media and Communications Landscape
- B. Purposeful Aging: Model for a New Life Course
- C. The Power and the Promise of Mobilizing Encore Talent for Youth
- D. Social Innovation, Social Impact: Exploring Encore Successes and Gaps

Navigating a Changing Media and Communications Landscape

Viral videos. Podcasts. Selfies. Instagram. If you're trying to draw attention to an issue, ignite action or share your news, keeping up with new communications tools and techniques can be daunting. This conversation with media and communications innovators will focus on how to leverage and respond to the latest trends.

Among the topics we'll discuss:

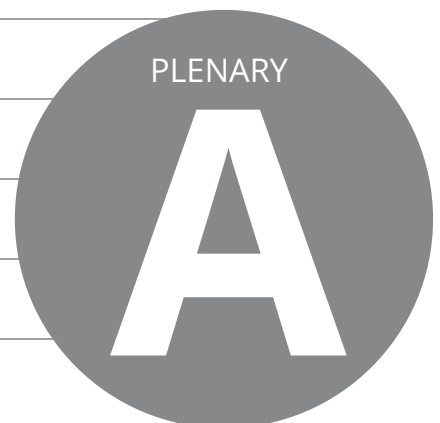
- Why podcasting has been called the new blogging.
- How different generations get their news and why it matters.
- How established media organizations and new startups disrupt the way we consume the news.
- How institutions and individuals bypass traditional media outlets to tell their own stories.
- How to draw attention to solutions, in addition to problems.
- When it makes sense to be an "early adopter."

Discussion Leaders:

- **Marci Alboher**, Vice President, Marketing and Communications, *Encore.org* (Moderator) | @heymarci
- **Farai Chideya**, Author, Journalist and Professor | @farai
- **Debbie Galant**, Publisher, *Midcentury Modern Magazine*; Associate Director, Center for Cooperative Media at Montclair State (NJ); Co-Producer, *The Chemo Files* | @debgalant
- **Courtney Martin**, Co-Founder, *Solutions Journalism Network* | @courtwrites
- **Sree Sreenivasan**, Chief Digital Officer, *Metropolitan Museum of Art* | @sree

For bios, go to: conference.encore.org/speakers

Notes:



Purposeful Aging: Model for a New Life Course

Longevity is increasing across America and the world, and the culture of aging is changing. Older adults are embracing new possibilities, turning away from traditional retirement, age segregation, decline and mass leisure. As the life course is re-imagined, purposeful aging represents an exciting new model of health, engagement and social contribution. How is the promise of purpose redefining longer lives? What pathways are emerging or needed to advance this aging revolution? Join leaders from higher education, the faith-based community, media and social enterprise to explore the potential of purposeful aging to improve communities, societies, and lives across the age spectrum.

Panelists:

- **Paul Irving**, *Chairman, Center for the Future of Aging, Milken Institute (moderator)* | @MIAging
- **Rabbi Laura Geller**, *Senior Rabbi, Temple Emanuel of Beverly Hills*
- **Kerry Hannon**, *best-selling author, journalist, speaker and expert columnist* | @KerryHannon
- **Jody Holtzman**, *SVP, Enterprise Strategy and Innovation, AARP*
- **Phil Pizzo**, *Founding Director Stanford Distinguished Careers Institute; Former Dean, Stanford School of Medicine* | @PhilPizzoMD

For bios, go to: conference.encore.org/speakers

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PLENARY

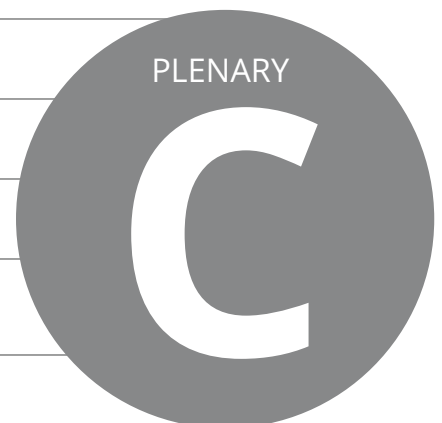
B

Experience Corps, a groundbreaking, evidence-based model for recruiting adults 50+ to help struggling young readers, turns 20 this year. The Purpose Prize – a revolutionary awards program that recognizes social innovators 60+ in areas like education reform, youth mentoring, foster care, health care and more – turns 10. What have we learned from these and other initiatives about opportunities and barriers to engaging encore talent at a sufficient scale to make a measurable difference for the next generation of young people? This session will explore the impact of the language we use, the roles we ask people to play, existing evidence, new technologies and funding mechanisms. Come ready to offer your own examples, questions and suggestions for the future.

- **John Gomperts**, *President and CEO, America's Promise Alliance (Moderator)* | @JohnGomperts
- **Michael Funk**, *Director, After School Division, California Department of Education*
- **Eunice Lin Nichols**, *Purpose Prize Director, Encore.org*
- **Lester Strong**, *Vice President of External Affairs and Experience Corps, AARP Foundation* | @ExperienceCorps

Notes:

PLENAR



Social Innovation, Social Impact: Exploring Encore Successes and Gaps

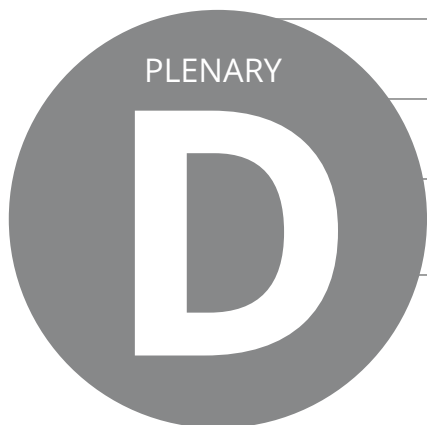
The idea of an encore stage of life is relatively new, but it's gaining traction. How has the concept of an encore life stage, focused on the greater good, contributed to social innovation and social impact? In what ways is it shaping careers, education and civic involvement? What are the implications for individuals at all stages of life? Join three leading social entrepreneurs, including two Purpose Prize jurors, to explore the promise, the challenges and the potential limitations of harnessing the encore movement to spur social innovation and make a measurable impact on solving social problems

Discussion Leaders:

- **Katherina Rosqueta**, *Founding Executive Director, the Center for High Impact Philanthropy, University of Pennsylvania (Moderator)* | @ImpactSP2
- **David Bornstein**, *Co-Founder, Solutions Journalism Network* | @dnbornstein
- **William Shutkin**, *CEO, Presidio Graduate School* | @shutkinpres

For bios, go to: conference.encore.org/speakers

Notes:





*Philadelphia Experience Corps tutor and students at Rowen School,
Philadelphia, PA. 2001*

WORKSHOPS 1-8
WEDNESDAY, FEBRUARY 10
1:15-2:45 pm

1. AARP and Encore: Celebrating Successful Partnerships
2. Collaborate or Co-blab-orate? Building Skills for Breaking Silos Across Sectors
3. Common Purpose: Engaging Millennials and Gen Xers in the Encore Movement
4. Encore Campaign for Children and Youth: Learning from Models for Large-Scale Social Change
5. Encore Fellowships as a Human Capital Strategy for the Social Sector
6. Encore Talent Works: Build Demand with a New Toolkit
7. Encore Innovation in Higher Education: Meeting the Demographic Challenges
8. Using Storytelling to Spread Your Message and Showcase Your Impact

Through programs like Life Reimagined and Age-Friendly Communities, several encore-focused initiatives have developed successful partnerships with state AARP offices. What makes these partnerships valuable to all parties? What has collaboration enabled both AARP and encore leaders to achieve? Attend this session to hear more about efforts in Florida, Michigan and beyond. Bring your own success stories and your questions for a dynamic discussion.

- **Bevan Gray-Rogel**, *Founder and President, Encore Tampa Bay (Moderator)* | @EncoreTampaBay
- **Michelle Cyr**, *Tampa Bay Field Coordinator, AARP Florida* | @AARPTampaBay
- **Jennifer Muñoz**, *Associate State Director, AARP Michigan*

Notes:

[illegible]

WORKSHOP 2

Wednesday, 1:15-2:45 pm

Room: Laurel Hill | 4th Floor

Collaborate or Co-blab-orate? Building Skills for Breaking Silos Across Sectors

For decades, individuals and organizations have been trying to solve our greatest challenges through siloed solutions. Recently, we have seen significant growth in the use and diversity of models of cross-sector collaboration; some create meaningful collaborations and drive measurable impact, while others end up doing more co-blab-orating than collaborating. Because cross-sector collaborations operate outside of traditional methods of authority and accountability, team-building is a key component of this work. Come explore the importance of developing trust, managing power dynamics and conflict, and fostering an innovation culture to successfully build alliances to solve problems and achieve shared goals.

Learn with:

- **Alison Gold**, *Manager of Leadership Education, Presidio Institute* | @AKGold11
- **David Styers**, *Manager of Program and Business Development, Presidio Institute*

For bios, go to: conference.encore.org/speakers

Notes:



WORKSHOP

2



How can we build bridges between encore talent and younger purpose-driven professionals? What mutual benefits exist when generations work together? What structures and belief systems currently stand in our way? How can we overcome these? This session will be a highly interactive group conversation, seeded by discussion leaders, inviting you to share personal experiences and explore ideas to prioritize action in support of intergenerational relationships.

- **Sarah McKinney**, *Encore Innovation Fellow, Encore.org (Moderator)* | @sarahmck
- **Ryan Cabinte**, *Associate Dean, Presidio Graduate Institute* | @rcabinte
- **Matt Carey**, *Co-Founder and CEO, Abaris* | @careymatthewr
- **Michael Gibson**, *Founder and Partner, 1517* | @William_Blake
- **Amy Merrill**, *Chief Partnerships Officer, Change Heroes* | @amyjmerrill

Notes:

WORKSHOP

3

WORKSHOP 4

Wednesday, 1:15-2:45 pm

Room: Sutter | 5th Floor

Encore Campaign for Children and Youth: Learning from Models for Large-Scale Social Change

The new Encore Campaign for Children and Youth (E4Y) is being shaped by learning from large-scale social change movements – such as the 100,000 Lives Campaign, ManUp, Freedom to Marry, the gun violence prevention movement and the women's movement. Join this workshop if you are interested in hearing from leaders of these diverse movements and exploring how their lessons can be applied to a new campaign within the encore movement – as well as local efforts to create big change.

Learn with:

- **Joe McCannon**, *Co-Founder, Billions Institute (Moderator)* | @billions_inst
- **Juan Barajas**, *Fundraising and Strategy Lead, Freedom for All Americans* | @jbarajas77
- **Jimmie Briggs**, *Field Manager, Encore Campaign for Children and Youth; Founder/Executive Director, Man Up Campaign* | @briggsjimmie
- **Phyllis Segal**, *Vice President, Encore.org; former Board Chair, Brady Campaign to Prevent Gun Violence*

For bios, go to: conference.encore.org/speakers

Notes:

WORKSHOP

4

Encore Fellowships as a Human Capital Strategy for the Social Sector

Over the last six years, more than 400 social-purpose organizations across the country have built their capacity to grow and better achieve their missions through a proven program for engaging high-impact encore talent: the Encore Fellowships program. This program model, featured in the *Stanford Social Innovation Review*, offers a triple win that benefits encore-stage individuals, social-purpose organizations and the funders seeking to cost-effectively support their growth. Come to this session to learn more about how this program can work for you.

Learn with:

- **Amy Duggan**, *Director, Center for Nonprofit Excellence, United Way of Central New Mexico*
(Moderator) | @asdveg
- **Lynn Baker**, *Process and Systems Improvement Director, Virginia Garcia Memorial Health Centers*
- **Janet Luce**, *Director, Aspiranet Encore Connect, Aspiranet*
- **Jim McGinley**, *EFN Program Manager, Social Venture Partners International*
- **Mike Mowery**, *National Director, Encore Fellowships Network, Encore.org*
- **Barbra Stonerock**, *Vice President, Community Engagement, Dayton Foundation*

For bios, go to: conference.encore.org/speakers

Notes:

WORKSHOP

5

WORKSHOP 6

Wednesday, 1:15-2:45 pm

Room: Telegraph Hill | 4th Floor

Encore Talent Works: Build Demand with a New Toolkit

Encore leaders know that experienced adults are a powerful resource for social enterprises – but many organizations still think “older people don’t have skills we need,” “I don’t have time to define a project” or “where would I find someone?” The new *Encore Talent Works* online toolkit answers those questions and more, with data, stories and how-to resources that speak directly to hiring managers, volunteer managers and executive directors. If your organization wants to build demand for encore talent, attend this session to learn about the toolkit and 2016 rollout plans.

Learn with:

- **Betsy Werley**, *Director, Network Expansion, Encore.org (Moderator)*
- **David Garvey**, *Director, Nonprofit Leadership Program, University of Connecticut*
- **Emily Merritt**, *Director of Intergenerational Initiatives at the Alliance for Strong Families and Communities*
- **Kate Schaefer**, *Coach, Consultant and Educator* | @kateschaefer

For bios, go to: conference.encore.org/speakers

Notes:



WORKSHOP 8
Wednesday, 1:15-2:45 pm
Room: Union Square | 3rd Floor

WORKSHOP 8
Wednesday, 1:15-2:45 pm
Room: Union Square | 3rd Floor

WORKSHOP 8
Wednesday, 1:15-2:45 pm
Room: Union Square | 3rd Floor

Using Storytelling to Spread Your Message and Showcase Your Impact

In this workshop, participants will learn about the power of storytelling to get everyone – from funders to volunteers to media – interested in their organizations and wowed by their impact on individual lives and communities. Participants will learn what makes a compelling story, then take away practical tips on gathering and writing stories, visual storytelling and storytelling via social media. There will be time for Q&A.

Learn with:

- **Karen Sughrue**, former Producer, “60 Minutes,” Encore Innovation Fellow (Moderator) | @KarenSughrue
- **Aanchal Dhar**, Marketing and Communications Associate, Encore.org | @AanchieD
- **Andy Goodman**, Author, *Storytelling as Best Practice* | @GoodmanCenter
- **Stefanie Weiss**, freelance journalist, Washington Post, VP for Communications, America’s Promise Alliance | @Stef_Weiss

For bios, go to: conference.encore.org/speakers

Notes:

WORKSHOP

8





*Hope Meadows, a planned intergenerational community in
Rantoul, IL, 2001*

WORKSHOPS 9-16
THURSDAY, FEBRUARY 11
8:30-9:45 am

- 9. Charting Your Encore Journey
- 10. Community Foundations as Encore Leaders: Models from Four Places
- 11. Experienced Adults Wanted: Models for Encore Engagements with Youth
- 12. Faith and the Encore Movement: Strengthening Alignment between Spiritual and Earthly Purpose
- 13. Going Global: The International Encore Landscape
- 14. Does Encore Engagement = Encore Impact? An Emerging Research Agenda
- 15. New Strategies for Engaging Boomers
- 16. University Retirees: Exploring Encore Models Within and Across Campuses

WORKSHOP 10

Thursday, 8:30-9:45 am

Room: Laurel Hill | 4th Floor

Community Foundations as Encore Leaders: Models from Four Places

Individuals age 50+ offer a wealth of experience gained from raising families, building careers and navigating life's ups and downs. Communities need human and financial resources to tackle chronic social challenges – low literacy rates among children and adults, poor health outcomes, homelessness and more. Foundations with place-based portfolios operate at the nexus of these phenomena – and they have the opportunity to support their city, region or state in leveraging the promise of encore talent. Join this session to explore the integral role that foundations and other local investors have played in strengthening human capital and creating a multiplier effect in terms of impact. Bring your examples and your questions to add to the discussion.

Learn with:

- **Therese Ellery**, *Senior Program Officer, Rose Community Foundation (Denver, CO)*
- **Kara Keating Copeland**, *Program Officer, The Cleveland Foundation*
- **Kate Luckert Schmid**, *Program Director, Grand Rapids Community Foundation*
- **Marlene Spalten**, *President and CEO, Community Foundation of Tampa Bay*

For bios, go to: conference.encore.org/speakers

Notes:



WORKSHOP 12

Thursday, 8:30-9:45 am

Room: Cathedral Hill | 4th Floor

Faith and the Encore Movement: Strengthening Alignment between Spiritual and Earthly Purpose

Faith, religious and spiritual communities can be powerful channels of distribution for the encore message, providing examples of purposeful action that can improve the lives of others. This session will explore the connection between faith and the encore movement and how to highlight this natural alignment. Participants will develop action steps to advance programmatic and communication efforts that will resonate within a faith context. This will be an interactive session, with minimal formal presentation.

Learn with:

- **Stacey Easterling**, *Vice President of Programs, Missouri Foundation for Health*
- **Ruth Wooden**, *communications consultant, Encore.org board advisor, and graduate student at Union Theological Seminary*

For bios, go to: conference.encore.org/speakers


Notes:



As the world wakes up to the reality of population aging, how are governments, NGOs, businesses and individuals responding? How do other countries engage older adults in social-purpose work? Canadian thought-leader Lisa Taylor will join Encore.org's Betsy Werley to moderate a conversation among the global leaders in attendance – including colleagues from Chile, Costa Rica, Denmark, France, Germany, Singapore, South Korea and the U.K. – as well as U.S. based leaders interested in the global encore movement.

- **Lisa Taylor**, *Founder and President, Challenge Factory, Canada* | @changepaths
- **Betsy Werley**, *Director, Network Expansion, Encore.org*

Notes:

A large, dark gray circular graphic in the bottom right corner. Inside the circle, the word "WORKSHEET" is written in white, uppercase letters at the top. Below it, the number "13" is written in a very large, white, stylized font.

Wednesday, 10:15-11:30 am
Room: Telegraph | 4th Floor

How do encore engagements affect people contributing after traditional retirement, whether in paid or pro bono roles? Can these engagements change beliefs and attitudes about aging, build community capacity and transform organizational performance? This session will offer insights from recent research focused on better understanding the encore talent equation. Participants will have a chance to engage with the presenters to explore how these research findings can inform their encore practice.

- **Jim Emerman**, *Executive Vice President, Encore.org (Moderator)* | @jemerman
- **Cal Halvorsen**, *Doctoral Student, Brown School of Social Work, Washington University in St. Louis* | @calhalvorsen
- **Jackie James**, *Co-Director, Boston College Center on Aging and Work* | @agingandwork

Notes:

WORKSHOP

4

WORKSHOP 16

Thursday, 8:30-9:45 am

Room: Twin Peaks | 4th Floor

University Retirees: Exploring Encore Models Within and Across Campuses

University retirees – highly educated administrators and academics – have a demonstrated dedication to service and to the transformative power of education. Yet they are a largely untapped source of encore talent. Attend this session to learn about three efforts to re-engage university retirees. Initiatives at USC and the University of Washington channel retirees' interests in encore pursuits on and beyond the campus. AROHE, the Association of Retirement Organizations in Higher Education, is an essential resource for sharing such experiences across dozens of colleges and universities. AROHE also provides a forum for university retirees to combine efforts to advocate for higher education to make effective, life-changing use of this important human resource.

What successes and challenges have leaders of these initiatives encountered? How can the lessons they've learned apply to other efforts? This session will address these questions and provide information about AROHE's 2016 conference, "Transforming Retirement."

Learn with:

- **Helen Dennis**, *Founder, Helen Dennis & Associates (Moderator) | @HDennis1*
- **Janette Brown**, *Executive Director, Emeriti Center, University of Southern California; Executive Director, AROHE*
- **Pat Dougherty**, *Executive Director, University of Washington Retirement Association; Host Administrator, UW Encore Initiative*
- **Caroline Kane**, *Vice President, AROHE Board of Directors*

For bios, go to: conference.encore.org/speakers

Notes:

WORKSHOP

16



*Rainbow Intergenerational Child Care Program, Little Havana,
Miami, FL, 2003*

Wednesday Breakfast Conversations

- 7:00-8:30 am: Breakfast Available
- 7:15-8:15 am: Optional Conversation Tables

Join a Conversation Table to meet attendees from your geographic area, explore a topic of interest or just start your day with a shared cup of coffee or tea. Tables 1 through 20 have an assigned topic, some with volunteer hosts; tables 21 through 25 are available for you to suggest something new; and the remainder of the tables are open seating. To suggest a table topic, please visit the registration desk.

Wednesday Sample Topics:

- Encore 101, Conference 101: For New Encore Advocates
- Encore 101, Conference 101: For Members of the Media
- An Introduction to the Encore Campaign for Children and Youth (E4Y)
- Cross-Generational/Intergenerational Mentoring
- Developing New Vocabulary for the Encore Movement
- Diversity and Inclusion: Expanding Participation in the Encore Movement
- Encore and Ageism
- Encore Movements Outside the USA
- Encores That Pay
- Evolving Definitions of Impact Investing
- Legacy And Impact: Making Lasting Change
- Peer Mentors for Encore Entrepreneurs
- Preparing for Your Encore: Life Design for "Pre-Retirees"
- Pro Bono Legal Help for Social Innovators
- Reinventing Higher Education
- Retiring/Pursuing an Encore as a Single Person
- The Role of Faith Communities in Supporting Encores

Please consult the list you receive at registration for final topics and their assigned table numbers.

Thursday Breakfast Conversations

- 7:00-8:30 am: Breakfast Available
- 7:15-8:15 am: Optional Conversation Tables

Join a Conversation Table to meet attendees from your geographic area, explore a topic of interest or just start your day with a shared cup of coffee or tea. Tables 1 through 20 have an assigned topic, some with volunteer hosts; tables 21 through 25 are available for you to suggest something new; and the remainder of the tables are open seating. To suggest a table topic, please visit the registration desk.

Thursday Sample Topics:

- Age-Friendly Design
- Age-Inclusiveness in the High-Tech Sector
- Coaching for People Planning Their Encores
- Encore Campaign for Children and Youth: An Introduction
- Taking E4Y Back Home: Ambassador Discussion
- Encores in Music and the Arts
- Encores in National Parks and other Public Sector Careers
- Engaging Skilled Volunteers/Pro Bono Talent
- How Tech Is Revolutionizing Retirement Finance
- Intergenerational Co-Housing
- New Models for Building Networks and Coalitions
- New Research About Purpose in Later Life
- Pass It On Network
- Scaling Social Innovations: Growing Size and Impact
- Supporting Senior Executive Transitions
- The Future of Fundraising/Creative Fundraising Approaches
- Village to Village Movement

Please consult the list you receive at registration for final topics and their assigned table numbers.

ENCORE FAST PITCH

In the last decade, we have witnessed a boom in individuals interested in pursuing encores in the second half of life. Yet far too many experienced adults, ready for a change, lack a clear place to land. They're "all dressed up with nowhere to go." Clearly, we need new models – both internal innovations, that leverage encore talent within organizations, and external innovations, that increase the engagement of encore talent for the greater good.

The \$10,000 Encore Fast Pitch competition is designed to showcase organizations that are closing the gap between the desire to pursue an encore and the available opportunities to do so. One \$5,000 prize will be conferred by a panel of judges. The other \$5,000 prize will be awarded via audience vote by Encore2016 participants.

The 2016 Encore Fast Pitch finalists, competing live in the closing session of Encore2016, are:

Asha Chandra, Program Manager, City of Fremont Human Services | @Fremont_CA

The Community Ambassador Program for Seniors (CAPS) creates an aging-friendly community by providing culturally sensitive services for older adults, by older adults in one of the most diverse cities in the country.

Ryan Frederick, CEO and Founder, Smart Living 360 | @SmartLiving360

Smart Living 360 is creating a new blueprint for multigenerational residential living that replaces institutional isolation of older adults with community connection and greater purpose.

Edgar Salazar, CTO and Co-Founder, Bridge for Billions | @Bridge4Billions

Bridge for Billions is a global collaborative tool that connects current and retired corporate employees as mentors to college-aged entrepreneurs in developing countries.

Laura Traynor, Director, ReServe | @Re_Serve

ReServe's Dementia Care Coaching (DCC) program leverages the experience of professionals 55+ to support and empower people with dementia struggling to continue to live at home.

Jill Vialet, Founder, Substantial | @jillvialet

Substantial is dedicated to redesigning the recruitment, training and support of substitute teachers – including strategic engagement of encore talent – to maximize teaching and learning.

We look forward to celebrating these social innovators who are paving the path for encore talent to be recognized as a robust and powerful national resource.

Encore.org would like to express special thanks to Andy Goodman, our distinguished panel of judges (Kriss Deiglmeier, Phil Pizzo and Katherina Rosqueta), our volunteer coaches (Scott Allen, Jere King and Diane Paul) and our friends at SVP.



*RV Care-A-Vanners building a house at Habitat for Humanity site,
Jacksonville, FL, 2002*

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

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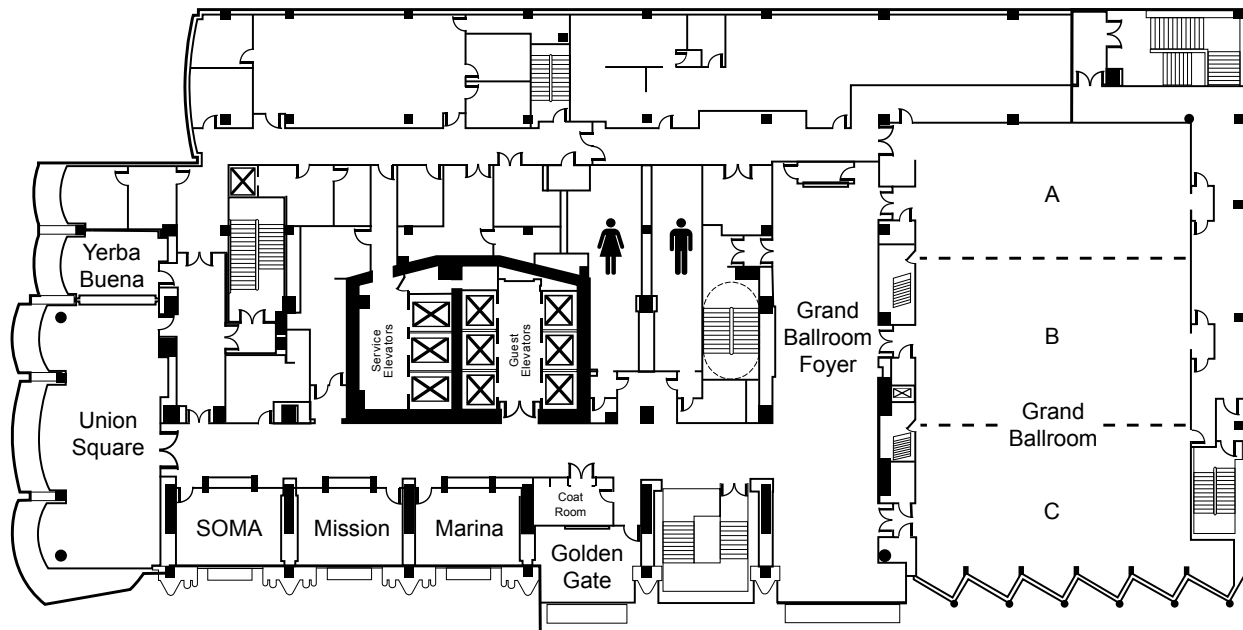
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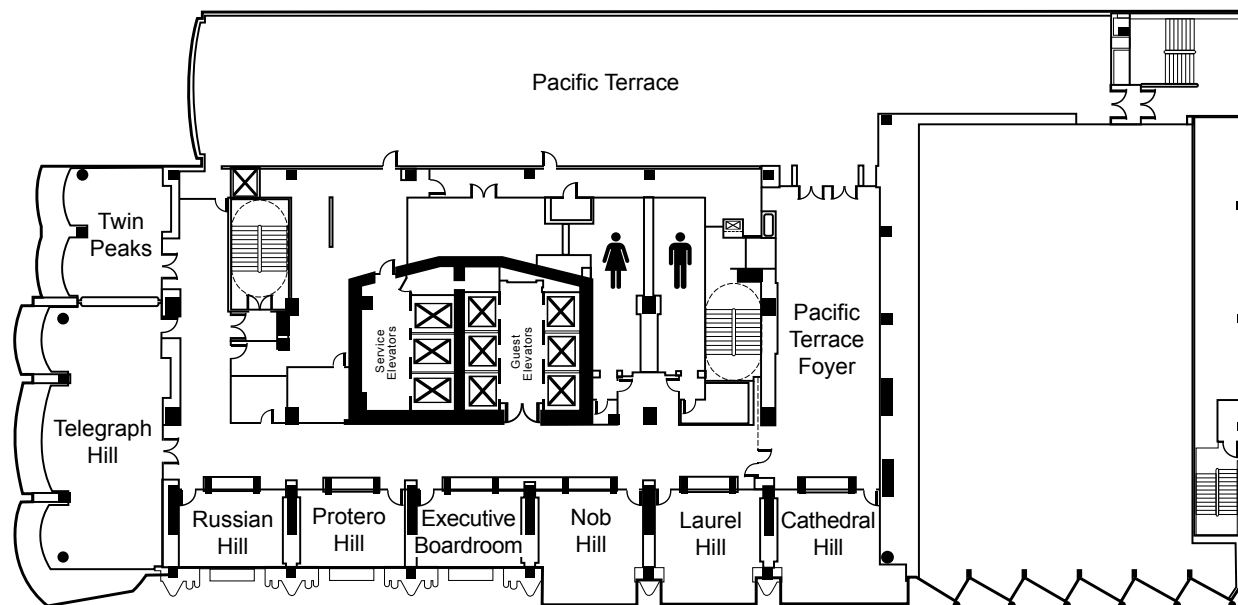
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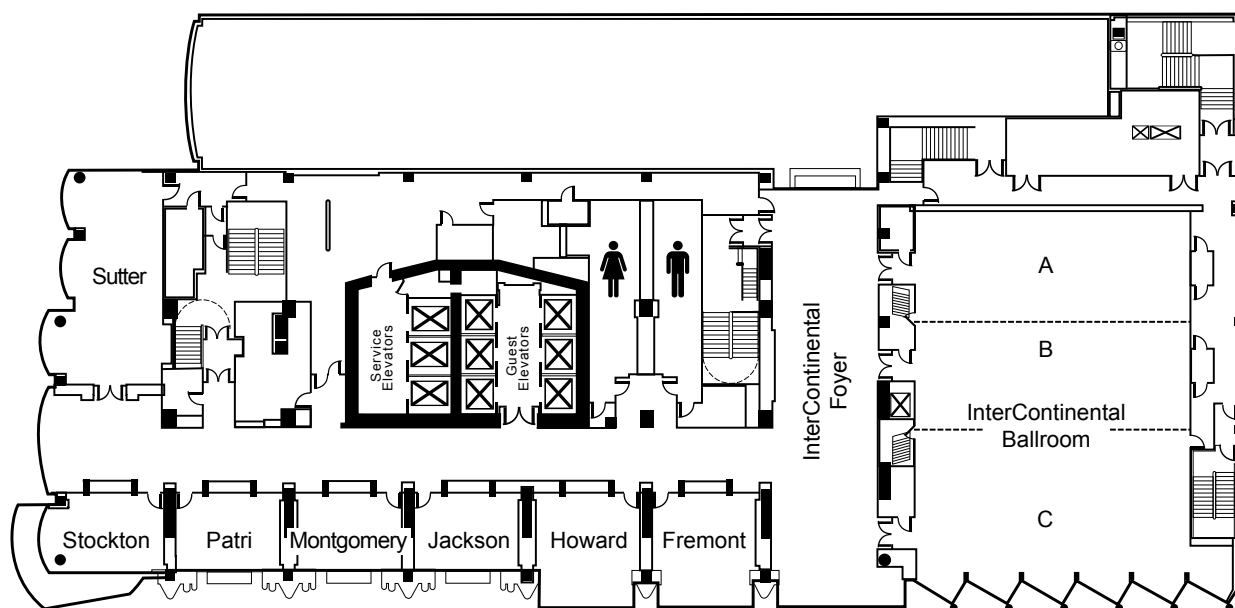
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Third Floor Plan



Fourth Floor Plan



Fifth Floor Plan



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