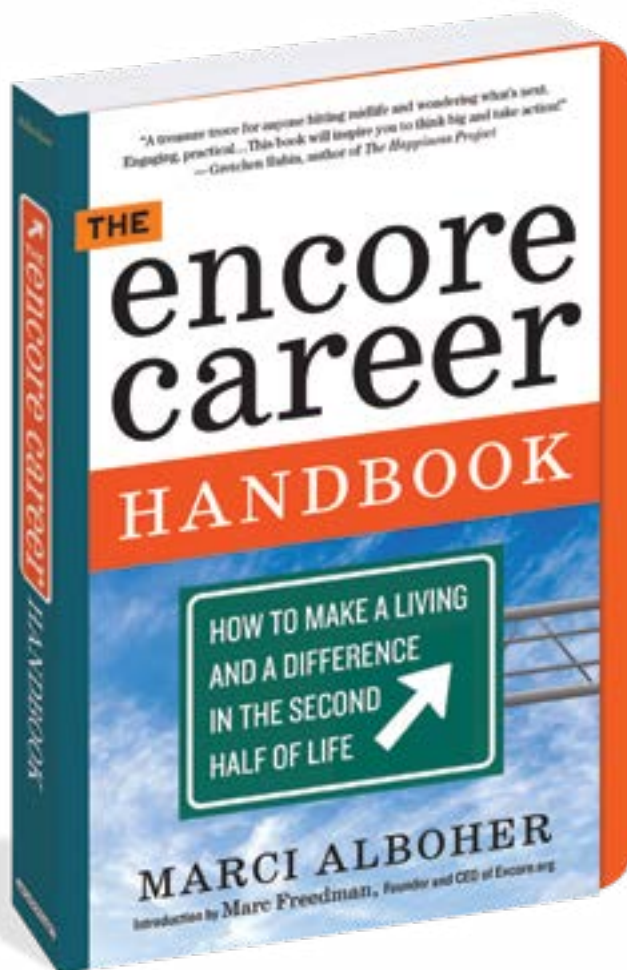


THE

encore toolkit



A Step-by-Step
Guide to Organizing
an Alumni Panel for
Your Alma Mater

THE ENCORE TOOLKIT

A Step-By-Step Guide to Organizing an Alumni Panel

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Who should use this toolkit:

The Encore.org Encore Alumni Toolkit is designed for any alum with a desire to spread the encore idea and contribute to making the second half of life an opportunity for continued engagement in addressing some of society's biggest social needs. It attempts to arm individuals with the tools and resources to introduce the encore idea to their colleges and universities by volunteering to lead, or support, efforts to bring information to classmates who may be considering next steps in the years following their primary careers and midlife responsibilities.

While the toolkit features college and university alumni programs, other groups like the Peace Corps, City Year or professional associations that maintain connections with former members can use these ideas and resources to reach out, engage and encourage alums to pursue encore roles.

The effort to engage alumni in this way is a new phenomenon, so the toolkit is an early collection of best practices. We invite you to contribute your own experiences, tips and lessons that we may incorporate into future versions. We welcome your suggestions on ways to improve the toolkit, and we ask users to send program details and samples of outreach materials. A form to report on your event appears on page 36.

Acknowledgments

The Encore.org Encore Alumni Toolkit was created by a team that included Marci Alboher, Dana Blecher, Jim Emerman, Judy Goggin, Cal Halvorsen, Lyle Hurst, Antoinette LaBelle, Leslye Louie, Sarah Maple, Michele Melendez and Phyllis Segal. In addition to their own encore expertise and personal experience participating in alumni encore panels, the team relied on Amy Singer for editing and on the input of encore partners and college and university staff and alums from around the country. Thanks to Lidija Tomas at Workman Publishing for her design. The sources we want to recognize include Christine Tetreault and Chris Sullivan, Harvard University Graduate School of Business; Aspasia Apostolakis, Northwestern University; Connie Matsui and Bill Beckman, Stanford Beacon Program; Beth Benjamin, management consultant, Maggie Jackson, Yale '82 and Carol Greenfield, Discovering What's Next. Their pioneering and innovative efforts have helped produce the tips and lessons shared here. It is our hope that this cadre grows exponentially and that the shared experiences and creativity continue to improve the quality and scope of activities that enable alumni to have a positive social impact in their communities and in the world. We also hope that these activities will strengthen the bonds between colleges, universities and their graduates and communities.

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INTRODUCTION

Why sponsor an encore panel?

Are you enthusiastic about helping the millions of people who are eager to pursue encore careers—work that combines purpose, passion and a paycheck after midlife? Would you like to spread the word about how encore work can effect important social change and make a difference in people’s lives? If so, we want to enlist you to raise awareness and help make pursuit of encore careers a new social norm. Like any movement, it will take many people doing many things—small and big—to make it happen.

Organizing an alumni event for your alma mater is one way you can help. We know from experience that alums in their 40s, 50s and 60s are increasingly turning to their colleges and classmates for help making an encore transition. We’ve also discovered that encore enthusiasts already tuned into the movement are among the best people to shape and deliver the encore message to fellow alums.

We invite you to reach out to your college or university with an offer to help plan and present an encore career event. Those who have done so say the experience has been rewarding. Of course, it does require planning and organizing, and this guide will lead you through the steps for preparing and running a panel discussion that presents the encore idea and introduces encore role models. It also outlines ways to engage folks and help them move forward after the presentation.

In these pages you’ll find background information about Encore.org and the encore concept as well as detailed checklists, sample letters and schedules to assist you in planning. Good luck! We look forward to your feedback.

Other Options: Thinking Outside the Panel

Alumni programs cover a broad range, and this guide focuses on presenting the encore concept through a live panel discussion. Other possibilities to consider include:

- **A book discussion:** (See *The Encore Career Handbook Discussion Guide* in the “resources” section at www.encore.org/handbook.)
- **Single- and multi-day programs:** These could be full-day workshops or multi-day executive education seminars.
- **Online programs:** Alumni events are now often offered as online webinars or teleconferences. This guide only covers production of in-person events, but you may want to look into digital options if you have expertise with these formats. For an example of a webinar series offered by Northwestern University, see www.encore.org/northwesternwebinar.

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PART I

Getting Started

Prepare Yourself

Get acquainted with the encore concept.

- Explore the resources on www.encore.org.

- Quick reads:

“Understanding Encore: Second acts for the greater good” (See page 15.)

“Having Patience When Considering an Encore,” by Maggie Jackson. An account by the organizer of an encore alumni event at Yale University. (See www.encore.org/learn/having-patience-when)

- For deeper background:

Encore: Finding Work that Matters in the Second Half of Life, by Marc Freedman. This book lays the foundation for understanding the encore trend—from the history of retirement to the ways in which the so-called retirement years are being reformed.

The Big Shift: Navigating the New Stage Beyond Midlife, by Marc Freedman. This book builds upon *Encore*. Essential reading for understanding the encore movement and its implications for both the individual and society.

The Encore Career Handbook: How to Make a Living and a Difference in the Second Half of Life, by Marci Alboher. The nuts and bolts guide to starting your encore career.

Boundless Potential: Transform Your Brain, Unleash Your Talents, Reinvent Your Work in Midlife and Beyond, by Mark S. Walton. Through the stories of late bloomers and a scan of the latest neuroscience, this book presents a counterintuitive look at the ways in which human potential gets stronger with age. (Note in particular chapter 11, “The Encore Manifesto.”)

Find out what type of alumni events your college or university offers—class reunions, homecoming weekends, special alumni gatherings on campus or in cities with alumni clubs—and think about where a moderated panel on encore transitions could fit.

Tip: Think about timing

Local alumni club or alumni chapter events occur throughout the year. Reunion and homecoming events are typically held annually, at the same time each year (usually fall or late spring around graduation) and usually celebrate “milestone classes” (years since graduation). More alums tend to sign up for reunions when their class is spotlighted, but alums from other classes frequently attend too, especially at smaller colleges. Experienced planners suggest reaching out 10-12 months before a reunion event; other types of events may need less lead time.

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Initiate the idea with your college.

- **Find out who's in charge of the event you've targeted.** In the case of reunions, a committee of alums often leads the planning. For alumni clubs or chapters, a volunteer alumni rep may be charged with local event planning. For other events, the Development office, Career Services or Continuing Education department may be involved. Contact your alumni office first to find the right person for pitching your idea.
- **Make your pitch.** Explain why an encore panel would be attractive to your classmates or fellow alums (See an explanation of the encore movement on page 15 and a sample letter to the alumni office on page 17.)

PART II

Design your event

Establish the logistics.

- Identify the contact(s) who will work with you throughout the process.
- Work with the alumni contact to establish the date, time and venue as early in the process as possible.
- Set the session length.

You're likely to need the cooperation of your alumni contact to determine how much time gets scheduled. Be sure to understand how much actual content time you'll get. Resist efforts to squeeze a session into an already-crowded program schedule or to shorten it in ways that lessen the opportunity for interaction. Experienced planners recommend 1 to 1.5 hours. Less than an hour is usually too little time to cover the subject and allow for adequate interaction. Beware of time eaten up with announcements, introductions and other business.

- Plan any related activities for before or after the event. Options to consider:
 - A social gathering. A social gathering scheduled after your event can help handle the overflow of energy generated by the presentation.
 - Informal networking. Create time for audience members to mingle and connect with the encore role models who served as panelists.
 - Structured networking. Sponsor a gathering where audience members can meet with nonprofit and public sector leaders.
 - An encore transition group. Inspired alums can join to meet on an ongoing basis after the event. (See the "resources" section at www.encore.org/handbook for ideas on how to do this.)

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Clarify responsibilities.

- **Define your role.** Decide whether you're more comfortable as the organizer, the moderator or both. Be ready to help find people as needed to fill other roles.
- **Clarify what the college will do.**
- **Leverage the college's resources.** For instance, the bookstore might want to sell copies of the recommended encore transition books at your event. Faculty experts and college counseling staff might make good moderators or speakers. And don't forget the value of using the college's event space or classrooms.

Tip: Have Books at Your Event

Consider using a ticketing or RSVP system for your event as those features often help with attendance. If you include the purchase of *The Encore Career Handbook* in the ticket price, you may also be able to cover some of the costs of your event. Work with a local bookstore, or, if you are ordering more than 10 copies, you can order directly from Workman Publishing at a bulk discount of 40-60% (contact: leslie@workman.com). In either event, unsold books can be sent back to the publisher.

If you choose not to include a book with admission, work with a local bookseller to sell books at the event.

Tip: Be persistent

Don't be deterred if event planners tell you there is no room on the agenda for your encore presentation.

- Consider hosting a get-together during a social time or open hour in the reunion schedule to lead an informal discussion on encore topics.
- If there's a presentation scheduled on a broader but relevant theme, see if you might be added as a panel member to talk about encore issues. See <http://bit.ly/12tU5pC> for the 2012 Harvard University reunion profile for an example of how one alum accomplished this.

PART III

Find panelists and prep for the event

Develop the lineup.

- **Choose the moderator.** If you're not inclined to moderate the panel yourself, help find someone experienced in public speaking or leading and facilitating groups. Possibilities include:
 - A fellow alum who teaches, works in journalism, government or another public role
 - A faculty member
 - A representative from the college career services department.

You'll need to serve as the content expert and brief the moderator fully on the encore concept, help frame the context for the panel and prepare questions for the panelists and audience.

Tip: Use social media to find panelists

If you are looking for a moderator or encore role models for your panel, consider posting a message in Facebook or LinkedIn groups for people in your class.

- **Find and select your panel.**
 - Start early. Experienced planners say it can take months to identify and find the right mix of panelists.
 - Search your class notes for role models from your alumni network or use social media to find alums who have transitioned to an encore career. Ask your alumni office contact to help identify possible panelists. (See "Creating the lineup: How to identify good encore panelists," page 23 for sample questions to ask prospective panelists.)
 - Try to achieve a diversity of gender, racial and type of encore role. Assess your prospects as good panel members.
 - Line up at least one extra panelist in case someone is unable to participate at the last minute.

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Prepare the panelists.

- **Confirm panelist and moderator participation.**
 - Send information in writing once an individual has accepted your invitation to participate as a panelist.
 - Provide details regarding the day, time and place of the panel. Include directions to the facility.
 - Be sure panelists know how they can contact you before and on the day of the event.
 - Explain the panel objectives, names and affiliations of the other speakers and their contact information.
 - Provide an agenda that outlines the event flow and timing. Include any advance questions, the length of time for each panelist's intro and the amount of time allotted for audience questions. (See suggestions in the "Planning Tools" section, which starts on page 15.)
- **Develop questions for your encore role models** (See tips on page 26.)
- **Have a backup plan** for panel members dropping out and other last-minute surprises.

Tip: Schedule a phone meeting

Hold a one-hour conference call two or three weeks ahead of the event to introduce panelists to each other and the moderator, review the agenda and reconfirm the flow and focus of the panel.

Map out the needs and flow of the day.

- **Make AV requests.** Arrange for microphones, photos and audio or video recording.
- **Structure the high-level event flow.** Sample timeline for a 1.5 hour event:
 - Welcome announcements, thank sponsors and hosts, introduce moderator—5 minutes
 - Moderator introduces the encore topic—5 minutes (See page 25 for sample script.)
 - Panelists briefly introduce themselves —10 minutes
 - Moderator leads panel discussion with encore role models—30 minutes
 - Q & A with audience—15 minutes
 - Mingle/networking—30 minutes

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- **Coordinate with the alumni staff who will be helping out.** Anticipate and communicate any support needs, including technical assistance and staff to count attendance, distribute materials, collect evaluations, handle refreshments or sell books.

Think ahead.

- **Plan to memorialize your event.** Share the stories being told by your classmates with a wider audience. Some ideas:
 - Provide visuals. Have someone videotape or take photographs of the event and then share the photos with your school's alumni office, on social media or with your alumni magazine.
 - Spread the word. Contact your alumni magazine—or another publication—and see if someone is interested in attending the event and writing about it. If you like to write, offer to cover the event yourself. For example, see the piece by Maggie Jackson in the Huffington Post: bit.ly/maggiejackson_huffpo

PART IV

Promote your event

Outline a promotion plan.

- **Think about your audience.** Alums who have already hosted reunion events find that interest in the encore topic is greatest among classmates who are approaching or already in their 50s and 60s. Some are retired, but many are still working. Reach out to graduating classes celebrating their 25—40 year milestones. If the alumni office has data available on ages, you can also reach out directly to more recent graduates who attended college as older students.
- **Choose a catchy title.** Write something that will stand out from all the offerings and notices your fellow alums regularly receive. The title should be brief and should capture the idea of combining continued work and purpose. Feel free to mix and match from these examples:
 - “From Success to Significance—Second Acts for the Greater Good”
 - “Purpose, Passion and a Paycheck in Your Second Act”
 - “How to Make a Living and a Difference in Your Second Act”
 - “Finding Work That Matters in the Second Half of Life”

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- **Leverage the university's existing alumni promotions.**
 - Get your event included in regular alumni newsletters and on the website.
 - Use the alumni office database to send an email announcement or invitation.
 - If the budget permits, print attractive postcards or brochures to mail or hand out at other alumni gatherings prior to your event.
 - If your panel will be held at a reunion event, be sure it is listed in any schedule, flyer or reminder that goes out to all alumni about the reunion.
 - Ask to have your panel mentioned in the opening remarks for the reunion so that people are reminded and encouraged to attend.
 - Hand out postcards or flyers promoting the panel at any social activities scheduled before your event.

RESOURCE: See sample program descriptions starting on page 18.

Tip: Make your message stand out

Personalize email communication. Alumni associations often bombard alums with email, and your piece might not get attention in an overcrowded inbox. To improve the chances your email will get opened and read, ask the alumni office to send it out with your name listed as the sender (known as a proxy), especially if it is going to members of your own class.

Tip: Use social media to spread the word in advance

Once you have set a date for the event, you can promote it by creating an invitation on Facebook or LinkedIn.

PART V

Organize the final details

Avoid last-minute surprises.

- Send a reminder on the location and time of the event to the panelists and any volunteers or staff who will help with logistics. (Include a map or directions.) Suggest that panelists, volunteers and staff arrive 15—20 minutes early to get familiar with the room setup and meet each other in person.
- Check in with panelists to confirm attendance and see if they have any questions about the event.

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- Check in with alumni office contact.
- Confirm AV requests.
- Print out copies of the agenda to share with panelists on the day of the event.
- Create and print handouts. (See samples starting on page 31.)
- If you are facilitating the panel, review “Leading the conversation: Tips for effective moderating,” on page 24.

PART VI

Facilitate the event

- Arrive at least thirty minutes early to make sure everything is set up as planned.
- Review and follow the detailed event flow checklist on page 27.

PART VII

Keep the momentum going after the event

- Thank all who helped. As soon as possible after the event, send thank you notes to the panelists, the event coordinator and others involved in planning. Give speakers feedback you received from attendees or from alumni staff that reviewed the evaluation forms.
- Debrief with your alumni contact. Set a time to meet in person or talk on the phone to discuss how things went. Allow enough time to receive and review the evaluations beforehand. Write up items to discuss in advance and send to your alumni contact.
- Follow up on your plans to memorialize the event.
- Share your experience with Encore.org. Use the feedback form on page 36.

Tip: Use social media after the event

Mention the event on platforms like Facebook, LinkedIn and Twitter. the sender (known as a proxy), especially if it is going to members of your own class.

Planning tools

The resources on the following pages will help guide your planning before and during the event.

Understanding encore: an overview	15-16
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UNDERSTANDING ENCORE:

Second acts for the greater good

THE VISION:

The encore movement aims to make it easier for millions of people to pursue encore careers—jobs that combine personal meaning, continued income and social impact. By producing a windfall of talented people working to help solve society’s greatest problems, the view of aging society can be transformed from “zero-sum” (what’s good for the gray-haired set is bad for everyone else) to “win-win” (what helps this cohort improves life for everyone else, too).

HOW WILL THIS CHANGE HAPPEN?

By promoting the encore ethos—and by encouraging the pursuit of encore careers in which people dedicate to a body of work in the second half of life that aims to solve social problems and leave the world a better place for future generations. “Having the encore ethos” is a bit like being “green.” It says something about a person’s relationship to the world and to posterity, about their priorities and perspective. Pursuing an encore career puts the ethos in action and is often a hybrid that maintains the spirit of service but does not forego the necessity of income.

WHY IT MATTERS:

With vast demographic change already underway, an established encore ethos will have relevance beyond the boomer generation. Half of the children born in the developed world since 2000 will live to celebrate their 100th birthday. The movement’s goal is to craft a new model that will also guide how future generations choose to spend the expanding period beyond midlife.

THE POTENTIAL:

As the old “golden years” norm breaks down, the question discussed around the water cooler will shift from “What are you going to do when you retire” to “What’s your encore?” Establishing encore as a new category and social expectation should make it the default option for individuals entering the second half of life. If pursuing an encore career becomes the path of least resistance, then everyone heading toward this phase of life has a better chance of finding meaningful work opportunities.

THE APPROACH:

The encore movement's focus is on leveraging talent, opportunity and need. It starts with this formulation: New Idea->Social Trend->Social Movement->Social Norm. Strategies include helping the encore idea go viral; catalyzing powerful organizations and sectors with latent self-interest in encore taking off; and mobilizing a large and expert leadership corps to pursue encore careers. Building a platform for the movement today will lead to an established social norm tomorrow.

KEY PLAYERS:

Encore.org, a nonprofit organization founded by social entrepreneur Marc Freedman serves as a hub and champion of the encore movement. Encore.org initiatives and a growing network of individuals, organizations, and institutions are building the movement one community and one pilot project at a time. For more information on individual programs, see the Purpose Prize at www.encore.org/prize, for social innovators in their encore careers; the Encore Fellowships Network at www.encore.org/fellowships, for experienced private-sector professionals transitioning to encore careers; the Encore College Initiative at www.encore.org/colleges, for higher education institutions preparing people for encore careers; and the Encore Network at www.encore.org/connect/local, a growing group of organizations active at the community level.

Sample letter to the alumni office:

Dear {alumni officer},

I'm writing to propose an event about encore careers that I believe will be of interest to our alumni network.

As people {like me—if it fits} hit their 25th, 30th reunions and beyond, they invariably start thinking about what's next in their lives. There is a surge of interest at this life stage in reinvention and retooling for something new. For a large number of {us} those people, that reinvention is fueled by an urge to do something that contributes to the greater good. This kind of work is called an encore career—the intersection of purpose, passion and a paycheck in a second (or third) act. Recent research from Encore.org, a nonprofit group, shows that 9 million people already consider themselves in an encore career and 31 million more are interested in joining them.

Events introducing the encore idea to college and university alumni have risen in popularity around the country. As people {like me} try to figure out what's next in {our} their lives, it's only natural that {we} they will turn to the institution that helped {us} them prepare for an earlier life transition.

I would welcome the opportunity to discuss the idea of organizing an "Introduction to Encore Careers" panel discussion for {insert institution name, reunion title or city club}. The event would feature examples of {Insert Institution Name} alumni who have already embarked on encore careers and could also include someone from the faculty and/or career planning office to lend an expert voice. I've included {attach, append or link to encore panel templates from this toolkit} a few sample descriptions of similar events that have occurred in association with other colleges and universities around the country.

Are you the appropriate person to talk to about this idea? If so, may we set up a time to chat in more detail? If not, could you help direct me to the right contact?

Thanks in advance for your time.

All best,

{your name and contact details}

PROGRAM TEMPLATE 1:

Crafting a second act for the greater good

SPONSOR: *University alumni association*
LOCATION/SETTING: *On campus, 30th reunion weekend*
LENGTH OF EVENT: *75 minutes*
TITLE OF EVENT: *Class of 1982: Second Careers, Doing Good*

Official Event Description:

We're the tail end of the boomers, living in an age of career fluidity and insecurity and working to make a better life for future generations. Join us for a great interactive discussion about encore careers, making time for service, juggling all our roles and more!

Learn how four classmates followed their passions to create second careers in the non-profit world.

Panel Participants and Presenters:

Moderator: Author/columnist

Encore Role Models:

- Corporate marketer turned environmental nonprofit co-founder
- Lawyer turned founder of nonprofit for children
- Lawyer turned founder of arts and culture organization
- Professor turned foundation head and filmmaker

Note:

This sample program and those that follow are based on real events recently held around the country.

PROGRAM TEMPLATE 2:

How to launch your encore

SPONSOR: *Graduate business school alumni association*
LOCATION/SETTING: *On campus, 25th reunion weekend*
LENGTH OF EVENT: *90 minutes*
TITLE OF EVENT: *Finding Work That Matters in the Second Half of Life*

Official Event Description:

Worried you're going to flunk retirement? Not even interested in trying? You aren't alone. Millions of Americans are entering a new stage of work in the period between midlife careers and retirement. What's more, research shows a significant segment of this population is looking for work that is purposeful, makes a meaningful contribution to the greater good and may provide financial compensation. Many are translating their management and experience into second careers as social entrepreneurs; others are launching new work at existing organizations focusing on fields like education or the environment. Taken together, this movement promises to produce a windfall of talent for solving some of the greatest challenges facing the nation, today. This session will tell the story of these pioneers and the emerging "Encore Career" phenomenon, and will provide practical advice for how our alumni can launch their own encores.

Panel Participants and Presenters (all alumni):

Moderator: Speaker on life transitions and encore trends

Encore Role Models:

- Participant in University Encore program
- President of nonprofit
- Director and CEO, social entrepreneur organization

PROGRAM TEMPLATE 3:

Discover what's next for you

SPONSOR: *Local university alumni chapter*
LOCATION/SETTING: *Local city chapter, conference meeting room*
LENGTH OF EVENT: *90 minutes*
TITLE OF EVENT: *Purpose, Passion and a Paycheck in the
Second Half of Life*

Official Event Description:

Wondering what's next in your life? Thinking about doing work you feel good about? Learn about how to move into a socially-minded role in the nonprofit and public sectors. In an informal discussion format, the presenters will cover: How to reconnect with or discover what matters most to you; how to balance needs for continued income, flexibility and the desire to give back; and how to move into this kind of role.

Panel Participants and Presenters:

- Local author and speaker on productive aging and encore trends
- Local director and speaker on encore programs, opportunities and pathways

PROGRAM TEMPLATE 4:

Reinventing yourself

SPONSOR: *Professional graduate school alumni office*
LOCATION/SETTING: *On campus, 25th reunion weekend*
LENGTH OF EVENT: *75 minutes*
TITLE OF EVENT: *Act II: Reinvention and Reengagement*

Official Event Description:

Some of us are starting to think about “retiring” or maybe already have. Some of us were victims of the downturn and may have been “downsized.” Some of us may have left the workforce for many years to raise a family and are now eager to get back in. All different situations, with one common theme: the need to reinvent ourselves and define our “second act.” In this session, moderated by an expert in professional transitions from the school, we’ll hear from classmates about their experiences dealing with the question of “What now?”

Panel Participants and Presenters:

Moderator: Director of university program on career and life transitions

Encore Role Models:

- Professor, regional university
- Program director, nonprofit
- Executive director, performing arts organization
- Government budget director

PROGRAM TEMPLATE 5:

Networking towards your encore

SPONSOR: *University alumni association (undergraduate and graduate)*

LOCATION/SETTING: *On campus, Alumni Center*

LENGTH OF EVENT: *45 minutes (with 60 additional minutes for 1:1 networking)*

TITLE OF EVENT: *Networking Panel: People Who Can Help You Transition to Your Encore*

Official Event Description:

The networking panel provides participants with practical university resources and connections that can help you take the next step forward in your encore transition.

Panel Participants and Presenters:

Moderator: An alum

Encore Role Models:

- Alumni association senior manager in charge of alumni leadership and volunteer engagement (university employee)
- Career transitions counselor (alum)
- Head of university program for fellowships and postgraduate public service (university employee)

CREATING THE LINEUP:

How to identify good encore panelists

When you locate a prospective panelist who has made a transition to an encore career, you'll want to collect basic contact information (phone/address/email/website, if applicable) and ask some questions to determine if the person is a good encore role model. These include:

- What was your prior career and what are you doing now?
- How old are you? At what age did you transition to your current career?
- What kind of process did you go through to figure out what you wanted to do and how to get there?
- How long did it take you to make your transition, and how would you describe the process?
- Describe any detours you encountered during the transition (both the positive and negative).
- Did you go back to school or for any retraining? If so, what kind and how was that experience?
- What do you enjoy about your new work, and what were some of the challenges along the way?
- How did you finance your career change?
- Are you willing to be interviewed by Encore.org or the media to talk about your transition?

Assess your prospect's potential to make a good panel member:

- Can he tell his story in less than 60 seconds? Avoid long-winded people who feel they need 3-5 minutes to present their tale.
- Is her storyline broad or compelling enough to attract and hold the audience's interest?
- Does the person's story add some kind of diversity to your panel? Consider obvious elements like gender and race, but also look for people whose stories will highlight different themes. Your mix could include someone who returned to school for retraining and someone whose transition required thoughtful financial planning. Also look for people working in different fields, as well as those working in different ways (for example as part-time or full-time staff, or as social entrepreneurs, freelancers or consultants). Finally, avoid a panel made up of only superstars, so that people don't feel the bar is too high to take individual action.

LEADING THE CONVERSATION:

Tips for effective moderating

Leading a panel can be rewarding and fun. These guidelines will help you succeed:

- **Prepare yourself in advance.** Prepare questions in advance using encore resources and media coverage (see encore.org). If you don't feel comfortable in the moderator role, find someone who is skilled at moderating panels or conducting interviews. While it's helpful if they understand the encore concept, you can serve as the content expert if needed.
- **Prepare the panelists.** Give panelists a context for their participation when you invite them to be on the panel. Be sure they understand the encore concept (send "Understanding encore," page 15) and are clear about why they were asked to participate. Hold a phone conference a week or two before the event. Give panelists two or three questions to help them prepare, but emphasize that the panel will be most effective if they tell their encore stories in a natural, informal way.
- **Ask panelists to introduce themselves in sixty seconds or less.** Don't read each panelist's bio. Ask panelists to be succinct and stick to limited highlights of their background. Reassure them that they'll have a chance to expand on their history and encore process when answering later questions.
- **Use PowerPoint or video with caution.** The moderator may choose to use video or PowerPoint to set the encore context for the session. But the panelists should speak in a way that is brief and personal, so tech presentations aren't recommended for panelists.
- **Interact with the panelists.** Ask a clarifying question if you think it will help the audience understand the panelist's story. Repeat or summarize any key elements, especially if they help segue to the next speaker.
- **Manage the Q&A.** Have a plan to manage audience members who monopolize the microphone or insist on talking about their own opinions rather than asking a question. One good tactic is to place index cards on all seats before the event begins and ask people to write out their questions. Immediately before the Q&A period, an attendant can walk around the room and gather the cards. The attendant and moderator can then quickly scan the questions and decide which ones to present to the panel.

KICKING OFF THE EVENT:

Sample script for introducing the encore idea

RESOURCE: For more suggestions, see “How to Be a Great Moderator” by Guy Kawasaki at bit.ly/kawasakionmoderating

It will be helpful to attendees if you introduce and frame the encore concept at the opening of your event. We put together this sample script. Feel free to amend it to suit your own style or the specifics of your event. You may also want to cite research on the trend (see www.encore.org/research for some ideas).

The demise of retirement has been well documented. People are working longer by choice and by necessity.

But if we're not striving towards the golden years vision of endless play, what are we pursuing instead?

For millions of people, the answer is an encore career—continued work that helps solve social problems and leaves the world a better place for future generations.

Today you are going to hear from several of your classmates who are pursuing encore work.

They'll talk about the challenges they've overcome, the lessons they've learned, how they are managing financially and how it has positively affected their lives and relationships.

And after a bit of conversation, we'll open it up to your questions.

AN ALTERNATIVE: Use multimedia

Consider showing one of the videos at www.encore.org/learn/videos, produced by Encore.org as a way to introduce encore and engage the audience at the beginning. If you use this approach, be sure you've tested the technology before people arrive. Have back-up technical support on hand—and have a written script ready in the event of a tech failure.

Tip: Include all alums

Be sure to acknowledge audience members who have dedicated their primary careers to public service or nonprofit endeavors. Applaud significant contributions already made while pointing out that even people already working in the social sector have encore options. Some may want to move from leadership to direct service roles, transfer their skills to new issue areas, serve as consultants or become social entrepreneurs..

GET PEOPLE TALKING:

Questions for panelists

Once you decide on a diverse group of people to serve as panelists, you'll want to have some questions ready to spark a rich conversation. Begin with one opening question for each panelist to answer. It's possible to have everyone answer the same first question or to give each panelist a personally tailored question. If you know your panelists well, you'll have a good sense of what you want each person to cover.

Before the event, let your panelists know the areas you'll want them to be prepared to discuss, but try not to stick to a set script. The best panels feel like a spontaneous conversation, not a predetermined presentation.

Possible opening questions:

- In his book, *Encore*, Marc Freedman wrote: "You save not to have freedom from work, but to have freedom to do the work you want to do." What does that statement mean for you?
- What made you want to participate in today's panel?
- How did you get to your "encore" moment?

Other ideas for questions:

- What new relationships have you developed because of your encore transition?
- What has been your biggest encore surprise?
- How has your encore transition changed your outlook about life?
- How has your transition changed your relationships with people close to you?
- What was it like to go back to school at {insert age}?
- What was the biggest obstacle you faced and how did you overcome it?
- Talk about a detour you took along the way.
- Many people talk about the difficulty of leaving behind one work identity and living without one for a period of time. Did you have this experience, and if so, how did you deal with it?
- Was there any stigma associated with making your transition?
- Is it possible to make the kind of move you did without good financial planning?
- What kind of trade-offs did you have to make in order to do what you're doing now?
- Is it possible for volunteering, pro bono consulting and serving on a board to feel like a "real job" or is getting paid a big part of how you see work?

Consider ending the panel with a common question for each panelist. Possibilities include:

- What's one piece of advice you'd give to anyone interested in following in your footsteps?
- What would you have done differently if you knew what you now know about making this transition?

RUN THINGS SMOOTHLY:

Detailed event flow checklist

Before the Event.

- Check the room setup. Check arrangement of tables and chairs for the moderator and panel. Have water, paper and pens available at each place. Make sure microphones and audiovisual equipment work.
- Have someone place index cards on each chair if you are going to ask people to submit their questions in writing rather than by stepping up to a microphone.
- Locate and manage distribution of handouts. Decide whether handouts will be given to attendees when they arrive or made available after the panel for those interested.
- Distribute event flow to the panel participants and volunteers when they arrive. Let panelists know what signal you will use to indicate when they need to wrap up.

Begin the Session.

- Welcome attendees, introduce yourself and explain your role.
- Frame the purpose of the panel. (See page 25 for a sample script.) Explain the panel format, including time allotted for panelist remarks and for the moderator and audience question and answer session. Announce any post-panel activities, such as networking or social events.
- Time the event carefully and use the previously-agreed upon signal to wrap up.
- Ask audience members to hold their questions to the allotted time.
- Ask each panelist to introduce him/herself.
- Begin with a good opening question for each panelist. Follow up with other questions as planned and allow panelists to interact. (See sample questions on page 26.)
- Introduce and manage audience Q and A with panelists. (If using the index card method, have a volunteer pick up the cards, quickly scan them and group similar questions together before giving them to you.)
- Announce that the end of the allotted time for Q and A is approaching by saying you'll take one or two more questions.

Wrap up the event.

- Identify key themes and points raised during the Q and A.
- Distribute or give instructions for where to find handouts and evaluations.
- Encourage participants to take action toward their own encore and mention the “What’s next” handout. (See page 31.)

Thank the panelists.

Explain in what ways the panelists will (or won’t) be available to answer additional questions immediately after the event or in the future.

ENCOURAGE ACTION:
Sample incentive

Encourage attendees to complete evaluations and take action. Consider an incentive used by Discovering What's Next (DWN), a local encore organization in Newton, MA. Organizers solicited complimentary coffee cards from Starbucks, which they gave to anyone who publicly announced a specific encore action they intended to take, and/or turned in an evaluation form at the end of the event. The coffee cards (see below) directly encouraged recipients to continue the conversation about encore at their local Starbucks.

Front:

Let's Talk Encore: Coffee and More!

This coupon entitles you to a maximum of three complimentary tall cups of coffee during one visit at the Starbucks locations listed on the back.

We hope that the great coffee and inviting Starbucks setting inspires some creative discussions about what's next for you at this encore life stage.



Please share your comments on this discussion at TalkEncore@discoveringwhatsnext.com

This coupon is valid only at listed Starbucks locations (see reverse side) until November 30, 2011.

Back:

Starbucks locations at which this coupon is valid:

Waban 474 Woodward Street, Waban	Needham 910 Highland Avenue, Needham	Newton L.F. 2322 Washington Street, Newton	Walpole 985 Route 1, Walpole
Wellesley 68 A Central Street, Wellesley	Newton U.F. 244 Needham Street, Newton	Newton Ctr 1269 Centre Street, Newton Centre	Union Sq 178 Linden Street, Wellesley
Norwood 1000 Providence Highway, Norwood	Newtonville 16-18 Austin Street, Newtonville		

Discovering What's Next thanks Starbucks and Michele Costello, District Manager, for making this possible.

Discovering What's Next · 225 Nevada Street · Newton, MA 02460
www.discoveringwhatsnext.com · 617-467-5438

A Step-By-Step Guide to Organizing an Alumni Panel

Handouts

Print copies of the following materials and distribute to attendees before or after your event.

What's next?

Ways to move forward in your own encore 31
Encore resources32-33
Evaluation form.....34-35
Feedback form for reporting to Encore.org about your event36-38



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What's next? Ways to move forward in your own encore

1. Follow up with someone you met at this event to continue talking about encore careers.
2. Follow Encore.org in social media (Facebook, Twitter, LinkedIn group).
3. Apply to be an Encore Fellow.
4. Suggest that your favorite nonprofit hire encore talent.
5. Start using encore language to describe what you're doing. For example, "I'm working on my encore."
6. Find a partner you can check in with from time to time or start an Encore Transition Group to build your network and keep yourself motivated. Download the free guide at www.encore.org/handbook.
7. Review the profiles of the Marigold and Purpose Prize winners at www.encore.org to get inspired about things you might do in your community.
8. Investigate volunteer or pro bono opportunities in your area. Check out: VolunteerMatch.org, Idealist.org, The HandsOn Network and The Taproot Foundation.
9. Consider taking a class or updating your skills. For example, take a workshop to learn how to use social media for social change or brush up on your tech skills. Look into local college offerings that will prepare you for the encore role you want to pursue.
10. Investigate volunteer or pro bono opportunities in your area. Check out: Volunteer-Match.org, Idealist.org, The HandsOn Network and The Taproot Foundation.
11. Publish something about this event.
12. Start a conversation about encore careers in your alumni group or another group on LinkedIn.
13. Nominate someone for the Purpose Prize (see www.encore.org/prize).
14. Write an online review of *The Encore Career Handbook*, *The Big Shift* or *Encore*.
15. Send your encore story to your alumni newsletter. Encourage classmates to do the same.
16. Look into the HR policies of your company to explore and encourage encore pathways and new work options (see www.encore.org/fellowships).

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Encore resources

Useful books

The Encore Career Handbook: How to Make a Living and Make a Difference in the Second Half of Life, by Marci Alboher.

Social Entrepreneurship: What Everyone Needs to Know, by David Bornstein.

Encore: Finding Work that Matters in the Second Half of Life, by Marc Freedman.

The Big Shift: Navigating the New Stage Beyond Midlife, by Marc Freedman.

Great Jobs for Everyone 50+: Finding Work That Keeps You Happy and Healthy...and Pays the Bills, by Kerry Hannon.

Boundless Potential: Transform Your Brain, Unleash Your Talents, Reinvent Your Work in Midlife and Beyond, by Mark S. Walton.

Live Smart After 50! The Experts' Guide to Planning for Uncertain Times, by The Life Planning Network.

The Age for Change: An E-Book for People 50+, by Coming of Age.

Smart Women Don't Retire—They Break Free: From Working Full-Time to Living Full-Time, by The Transition Network and Gail Rentsch.

Volunteering, service and pro bono consulting

AARP Experience Corps—www.aarp.org/experience-corps/

Catchafire—www.catchafire.org

Create The Good—www.createthegood.org

Corporation for National and Community Service—www.nationalservice.gov/

Executive Service Corps—United States (ESCUS)—www.escus.org

HandsOn Network—www.handsonnetwork.org

ReServe—www.reserveinc.org

Taproot Foundation—www.taprootfoundation.org

VolunteerMatch—www.volunteermatch.org

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Fellowships and continuing education

American Association of Community Colleges Plus 50 Program—

<http://plus50.aacc.nche.edu/Pages/Default.aspx>

Empowered—www.empowered.com

Encore College Initiative—www.encore.org/colleges

Encore Fellowship Network—www.encore.org/fellowships

Board service

Bridgestar—www.bridgespan.org/About/Bridgestar.aspx

Boardsource—www.boardsource.org

BoardnetUSA—www.boardnetusa.org

Social sector jobs and career development

CareerOneStop—www.careeronestop.org

Foundation Center—www.foundationcenter.org

Idealist.org—www.idealist.org

Work Reimagined—www.workreimagined.aarp.org

Virtual Career Network-Healthcare—www.vcn.org/healthcare

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Sample Event Evaluation

{Your Logo Here}

Learning more about the people who attend our events and getting their feedback helps us develop and deliver more effective programs. Please take a few minutes to tell us about yourself and your experience at today's event.

1. How would you rate today's program? (circle your response)

1 2 3 4 5
Poor Fair Good Very good Excellent

2. How well did the program meet your expectations? (circle your response)

1 2 3 4 5
Not met Met Exceeded

3. What aspects of the program did you find most useful? (check all that apply)

- Explanation of encore
- Panelists
- Q and A
- Handouts
- Networking

4. How did you learn about this program? (check all that apply)

- Email
- Website
- Friend
- Newspaper
- Other (please specify) _____

5. What motivated you to learn more about encore careers? (check all that apply)

- Retirement considerations
- Time for a change
- Desire to give back
- Looking for work
- Relocating
- Other _____

6. Are you interested in pursuing an encore career opportunity? (circle your response)

1 2 3 4 5
Not now Maybe Very much so

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7. What is your current work status? (check all that apply)

- Full-time
- Part-time
- Self-employed
- Retired
- Unemployed
- Volunteering
- Other: _____

8. An encore career combines personal meaning, continued income and social impact. Rank each component in order of importance for you (1 = most important; 3 = least important).

___ Personal meaning ___ Continued income ___ Social impact

9. Present position and title (if any): _____

10. Age _____

11. Male Female

12. Marital status _____

13. Education (check the highest level attained):

- Some college
- Two-year degree
- Four-year degree
- Graduate or professional degree

14. Any other comments?

15. Optional: Please give us your contact information (name, email, phone):

Name: _____

Email: _____

Phone: _____

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THE ENCORE TOOLKIT

A Step-By-Step Guide to Organizing an Alumni Panel

Feedback form

We hope you had a successful event. Please use the [form](#) that follows to let us know how it went. We welcome your suggestions on ways we can improve the Toolkit. You can write us at encoreu@encore.org

Thank you!

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FEEDBACK:

Report on your encore event

We hope The Encore Alumni Toolkit helped you plan a successful event. We want to keep improving the Toolkit and add lessons as they are learned, so please report back to Encore.org about your event. With your approval, we may showcase your program as a model for others.

Please fill out the form below. Omit any fields that don't apply. Feel free to share additional observations in the notes section including suggestions for improving the toolkit. Then save your entries and email the form to us at encoreu@encore.org. Many thanks.

Name of institution (and department, if applicable): _____

Lead contact (name, title, email, phone): _____

Date and time of event: _____

Title of event: _____

Official event description: _____

Marketing activities: _____

Event URL: _____

Fee: _____

Length of event: _____

Contact information for all speakers (name, title, email, phone and role at event). Include moderators, experts, encore role models, faculty and alumni office participants:

- Contact #1: _____
- Contact #2: _____
- Contact #3: _____
- Contact #4: _____
- Contact #5: _____
- Contact #6: _____

Number of attendees: _____



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Share relevant media and documents:

Include any photos, videos. Did anyone write about the event? If so, please share a link or cut and paste the report. Attach copies of any flyers, agendas, PowerPoint slides or event evaluations.

Please share any insights you'd like us to know about the event:

What worked and what could have been better? What might you have done differently?

Share any suggestions you'd like to make to improve the toolkit:

**Thank you for taking the
time to share your
experience with others.
Please email this document to
encoreu@encore.org.**



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