

Building an Encore Community:

Lessons Learned from Maricopa County, Arizona



ENCORE.org

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INTRODUCTION: WHY MARICOPA COUNTY

For organizations seeking guidance on how to build an encore program, there's no better place to start than Arizona's Maricopa County. For nearly 15 years, Maricopa County – which includes Phoenix and over two dozen surrounding cities and towns – has been forging forward in the encore movement: developing programs and initiatives that engage experienced adults to do social purpose work; educating nonprofits about ways to incorporate encore talent into their organizations; and encouraging collaborations between government, higher education institutions, nonprofits, funders and community members.

The efforts are improving lives and providing nonprofits with critically-needed assistance. Through Mesa United Way, a former IT professional started a volunteer tax assistance program that helped individuals receive more than \$4.4 million in refunds in the last tax year. At the Arizona Science Center, encore workers have designed experiments and created educational materials. Hundreds of other encore workers have assisted nonprofits in significant ways, such as helping food pantries improve distribution, counseling disadvantaged women about reentering the workplace, mentoring at-risk students and offering rides, meal delivery and other services that have enabled senior adults to remain independent in their own homes.

That capacity has been fostered by Virginia G. Piper Charitable Trust, a place-based, private philanthropy in Maricopa County. Building on the legacy of nonprofits like Aspiranet, an early adopter of the encore concept, and organizations like the National Council on Aging, Piper Trust supported local nonprofits to test and adapt programs like Experience Corps, Encore Fellowships and The Purpose Prize® – all originally launched by Encore.org. As these programs have matured and expanded, Maricopa County stands out as one of the only places in the country where it's possible to see a whole spectrum of encore work in action.

Such changes couldn't be happening in a more appropriate place. With the creation of Sun City in 1960, Arizona pioneered the golden years model of leisure retirement. Now, Maricopa County is leading the way in shaping a new paradigm – one in which adults reaching retirement age use their time and talent to give back to their communities. And that pool of talent is significant: more than 1.1 million of the county's four million residents are aged 50 or over. That's a lot of encore potential.

ENCORE.ORG: DIFFERENT NAME, SAME MISSION

Civic Ventures changed its name to Encore.org in 2012. This report will primarily use Encore.org, except when referring to specific work or programs that used the Civic Ventures name in their titles.

"Never before have so many people had so much experience and time and the capacity to do something significant with it," says Marc Freedman, CEO and founder of Encore.org (previously known as Civic Ventures).

CREATING A VISION FOR MARICOPA COUNTY

When it launched its encore development efforts in 2001, Piper Trust was a relatively new foundation interested in helping the local community address the issue of productive aging. Piper Trust surveyed older adults and found that a majority wanted to volunteer, connect with others and continue learning. But with few models for tapping encore talent to solve social problems, the local community didn't have a strategy – or even understand how to engage this encore talent.

Even the concept of encore mystified most people. “No one knew what we were talking about,” says Carol Kratz, then Piper Trust’s program director responsible for developing the Trust’s older adult grantmaking approach.

And so Piper Trust set out to explore the possibilities and build awareness by convening a countywide Commission on Productive Aging to involve agencies and individuals interested in older adult issues. This effort, with assistance from Encore.org and Libraries for the Future, created what became the Blueprint for the Next Chapter®. The Blueprint identified ways programs within existing institutions such as libraries and community colleges could develop resources and activities to increase awareness of the encore idea and help match encore talent with social purpose opportunities. The Blueprint showed “here’s what we’re trying to do,” says Kratz.

Based on the Blueprint, the Trust launched four Next Chapter projects largely focused on engaging baby boomers with the encore idea. The Trust also helped fund the Workforce Transition Program through GateWay Community College, which aimed to help boomers transition to new areas of employment and prepare nonprofits to employ this crop of older workers.

While these efforts fueled eagerness among individuals interested in pursuing encore work, it soon became clear that nonprofits and other organizations didn't fully understand how to tap the talents of seasoned workers. “We were trying to solve world hunger when people didn't know what world hunger was,” says Kratz. “The institutions we were trying to change didn't understand what their role would be.”

“The encore movement in Maricopa County is the perfect example of how collaboration among nonprofits, public agencies and the private sector produces social change – we all must continue to channel the expertise of our encore ‘workforce’ to address the social needs in our community,”
says Susan Pepin, president and CEO of Virginia G. Piper Charitable Trust

A new approach was needed. Piper Trust convened a strategically-selected leadership group to determine what was needed in Maricopa County to move the still-emerging encore idea forward. The Trust subsequently linked up with the National Council on Aging's RespectAbility initiative to launch the Maricopa Models of Significant Service. These efforts, which focused on helping nonprofits envision innovative ways to use encore talent in key leadership roles, led to the creation of Experience Matters, a one-stop organization aimed at helping nonprofits gain access to the growing pool of experienced talent.

What other communities and organizations can learn from Maricopa County

- The importance of collaboration and forging relationships. Groups benefit when working together to develop relevant programming and messaging. Include a wide range of potential leaders – and realize that some may be resistant. Don't let resistance stop the forward momentum. Try to engage resisters, but also be realistic that some individuals or organizations are going to hold fast to their traditional path.
- Committed leadership is key. If an organization doesn't have the capacity or support of its leadership, change is not likely to happen.
- Understand and engage potential funders to convene exploratory gatherings and play a leadership role. Show issue-specific funders how incorporating encore talent serves their mission.
- If you don't have a major funder, growth may move slower. Focus on building a local network, connecting to the national network and expanding awareness of the encore idea. Collaborate to develop programming and a compelling message and to build a leadership team that can bring visibility and funding connections.
- Nonprofits need guidance on how to rethink the way they recruit, train and engage encore talent in both paid and unpaid roles.
- Be patient and don't try to do everything at once. Successful projects phase in new programs one step at a time.
- Keep reviewing. Tweaking new ideas can improve integration into the organization and sustainability.
- There's no single model for success. Encore is an idea, not a franchise.

PIPER TRUST'S HISTORY WITH ENCORE

Carol Kratz was attending a Grantmakers in Aging conference in 2001 when she first heard the term "civic engagement." Encore.org CEO and founder Marc Freedman was describing his vision of harnessing the experience and energy of baby boomers into work with a social purpose – a vision that resonated with other ideas Kratz had been contemplating in her new role as the program officer in charge of developing the older adult grantmaking approach for the recently-launched Piper Trust.

Kratz had already been thinking about aging and the needs of older adults. Her own reading, conversations with community members and research funded by Piper Trust all pointed to the same thing: far fewer older adults fit the frail and elderly stereotype and many more wanted to be engaged and productive in their community.

One of Piper Trust's priorities is to support ways for older adults in Maricopa County to remain healthy, independent and productively engaged in their communities. Since the Trust's inception in 1999, it has invested \$18 million in support of older adults with \$8 million going specifically to projects or organizations in Maricopa County that support and encourage civic engagement among older adults.

Connecting supply and demand

EXPERIENCE MATTERS

WHAT IT IS

A one-stop hub organization, launched in 2009 to connect supply (encore seekers, mostly aged 50+) with demand (nonprofits). Under the leadership of chief executive officer Nora Hannah, a real estate industry leader now in her own encore career, Experience Matters has expanded from a grant of \$145,000 in seed money from Piper Trust, Atlantic Philanthropies' Community Experience Partnership and the Arizona Community Foundation, into an organization with a staff of 13 and an annual budget of around \$2 million.

WHAT IT OFFERS

Training and engagement for nonprofits to understand how they can incorporate encore talent and the value to their organizations of doing so. Training is offered through two-day Learning Lab workshops, which are based on a model created by the national initiative Coming of Age. The labs guide nonprofits on a range of issues, including:

- How to craft compelling opportunities by defining the scope of a project, creating a job description, outlining the skills needed and describing the desired outcome. Encore workers – and funders – like well-articulated projects that will tap their skills and talent and make an impact.
- How to manage an intergenerational workforce and supervise encore workers whose expectations and needs often differ from those of younger full-time staff.
- How to make an encore worker aware that his or her contributions have been effective and important to the organization. People in senior leadership typically have the big-picture view of the organization and need to communicate that to the encore worker.

Multiple options for individuals to pursue encore work.

- **Encore Fellows program.** Part of the program started by Encore.org, highly-skilled professionals looking to transition from the for-profit sector are matched with nonprofits that can use their skills and talents. Fellows working in these 6-12 month positions are paid a stipend.
- **Service by Design Associates.** Short-term pro bono placements for skilled professionals who don't want to make a longer-term commitment.
- **AmeriCorps.** Matches workers with opportunities in Maricopa County schools either as mentors to students or as advisors to school leaders on building community outreach and resources.
- **RSVP.** More traditional volunteer opportunities for people of varied experience levels. The positions include tutoring, meal delivery and benefit assistance to seniors, the disabled and caregivers.

"Organizations supporting encore talent sometimes struggle, because they believe that it just happens – if we build it, they will come," says Hannah.

Multiple ways for individuals to explore the encore idea.

- **Encore Discovery.** A series of four sessions in which participants can meet like-minded adults, learn about the phases of transition and understand what resources are available to help them take the next step.
- **Explore Your Future.** A follow-up to Encore Discovery. In four sessions, participants chart an action plan for an encore career transition.
- **Monthly book group.** Participants meet to discuss books related to encore careers and transitions.

Ways for the business community to engage.

- Intel has placed more than 60 of its own employees in Encore Fellowships.
- Other corporations have sponsored individual fellows, though not from their own organizations.
- Businesses, including Bank of America, CopperPoint Mutual and Verrado Victory District/DMB, also regularly underwrite individual events and speakers and have sponsored articles in the Experience Matters newsletter.

LESSONS LEARNED

Identify and make use of key influencers.

- Experience Matters used the offices of Piper Trust as the site for its initial informational meeting for individuals interested in applying for an Encore Fellowship. Some 70 people showed up, far exceeding expectations. It was a breakthrough event, Hannah says, because when Piper Trust representatives saw the level of interest and the caliber of talent, they approved increased funding. Experience Matters was able to place 24 fellows that first year, up from Hannah's target of 8-12 fellows.
- Experience Matters also held one of its initial information sessions for nonprofits at the offices of Piper Trust, which helped motivate organizations to attend.

Create exclusivity. Following the informational meeting for nonprofits at Piper Trust, Experience Matters invited them to apply to attend a Learning Lab workshop. To get their attention, Hannah noted that attendance would be capped and that space was limited. Twenty organizations signed on for the first session.

A NEW MODEL WITH WIDE IMPACT

- Launched in 2009 with one staff member; now has staff of 13 and annual budget of around \$2 million.
- Has convened 17 Learning Lab workshops for 223 nonprofits to build their capacity and engagement of encore talent.
- Has business partnerships with 18 corporations, foundations and think tanks.
- Has offered 11 Explore Your Future workshops to 103 older adults.
- Has placed 113 Encore Fellows in 86 organizations, including 63 from Intel.
- Has matched 50 volunteers through the Service by Design program.
- Has matched 40 volunteers through RSVP.
- Has matched 40 volunteers through AmeriCorps.
- Total volunteer placements in five years: 243.

Don't reinvent the wheel. Tap or model existing programs that meet your needs.

- Experience Matters learned that nonprofits didn't easily understand how encore talent could advance their mission. Using the Learning Lab sessions helped articulate the possibilities. "Once we get them there, they understand the concept and the benefits," says Hannah. "The goal was building trust and having nonprofits know we were there to help and provide more resources."
- Similarly, Experience Matters embraced the already successful Encore Fellows model and became part of Encore.org's national Encore Fellowships Network.

Show impact in measurable ways. Experience Matters conducts a survey of nonprofits 90 days after the end of each Encore Fellowship to measure the financial impact of the work done and what other resources became available as a result of the work. "We monetized the value of placing people in the community," says Hannah. "We asked every match: What's it worth to you? What other resources did you get?" Experience Matters launched a business plan in 2012 that aims to generate \$35 million of resources over five years. They generated about \$3 million in 2013 and expect to generate at least \$5.5 million in 2014.

Assemble an experienced team of personal advisors. When Hannah was first tapped to run Experience Matters, she recruited a small think tank of volunteers who agreed to gather for five meetings about once a month. The team, which included a transition coach, a wealth management expert, an outplacement expert and a nonprofit leader, helped Hannah strategize about getting the Encore Fellows program off the ground. "They were hugely valuable," says Hannah.

Be patient. Enlightening nonprofits to the value of encore workers is a sales process, says Hannah, and none came on board without a one-on-one meeting. "Organizations supporting encore talent sometimes struggle, because they believe that it just happens – if we build it, they will come," says Hannah. Relationship development with nonprofits can take a couple of years and requires personal interaction. Experience Matters has three engagement advisers (one full-time and two part-time) who work one-on-one with nonprofits.

"We monetized the value of placing people in the community. We asked every match: What's it worth to you? What other resources did you get?" says Hannah.

"Don't allow for shortcuts, and don't be tempted to say 'it's okay' just to nab a big name," says Hannah.

Know your area. Assess the demographics and need on both the supply and demand sides. “We have more than our fair share” of supply, says Hannah. But “we are focused on meeting community needs. If nonprofits needed no resources, we would disappear.”

Factor in sustainability. Aim for multi-year grants instead of annual grants and seek ways to increase earned revenue. Experience Matters earns revenue in multiple ways, including payments for recruiting volunteers, corporate sponsorship of events and individual fees for workshops. The organization, which launched with philanthropic donations, will operate this year with more than 50 percent earned revenue, says Hannah. Her goal is a budget with 70 percent earned revenue.

Be attentive to language. “It’s huge,” says Hannah, who rarely uses the word “senior” and also uses the “baby boomer” label sparingly. “I try to avoid too many age references, because all it does is leave people out,” she says. She prefers to focus on words like “skills” and “experienced talent” or “experienced adults.” Labeling someone a “volunteer” can also be troublesome as some people associate the term with mundane tasks done by less reliable workers for free. “It has an immediate connotation that’s not positive,” Hannah says. She talks about “paid and unpaid work” and the “contribution of human capital” – and coaches nonprofits to do the same. “You’re all members of the same team,” she says.

Be selective and don’t cut corners – with volunteers or nonprofits.

“Screening and preparing the supply side is a huge undertaking,” says Hannah, who was not overly selective as she recruited volunteers and fellows in the early days. “I realized I recruited people who weren’t there for the right reasons,” she says. Some people were focused more on their own personal mission, like building a consulting business, rather than on helping the community solve a problem. “They were still dealing with the loss of ego after leaving a major career. Nonprofits want you focused on the mission, not on how important you were in your last job,” she says. Hannah also once let a major nonprofit organization skip the Learning Lab, and its match didn’t work out. Her takeaway: “Don’t allow for short cuts, and don’t be tempted to say ‘it’s okay’ just to nab a big name.”

The value of a city's commitment

AARP EXPERIENCE CORPS TEMPE

WHAT IT IS

This Tempe-based chapter of a national organization grew out of one of Piper Trust's early efforts. The program focuses on training and mobilizing adults 50 and older to help children in grades K-3 learn to read. Volunteers are placed in schools to mentor and tutor students one-on-one or in small groups. Volunteers commit to work twice a week while school is in session.

The original Experience Corps grew out of an idea introduced by social entrepreneur John Gardner, the former Secretary of Health, Education and Welfare and one of the founding board members of Civic Ventures (now Encore.org). Launched as a pilot project in five cities in 1995, Experience Corps was run by Encore.org for 12 years before joining forces with AARP in 2011.

"The main focus we felt was to really take a look at community engagement activities and up the ante from what we were providing," says Goldberg.

HOW IT EVOLVED

Forward-looking government leadership and local commitment were essential to the development of Tempe's Experience Corps program and demonstrate how the encore idea can evolve in a community.

In 2002, the City of Tempe convened a citizens' task force to study the impact of aging in the community. The task force explored many issues, including housing, transportation, lifelong learning and healthy aging. The goal was to explore how the City of Tempe could respond to upcoming needs, says Peggy Goldberg, who then worked in program development for the city's social services division.

The Tempe task force dovetailed with Piper Trust's countywide convenings around similar questions. The Trust was offering planning grants to communities interested in turning the aging paradigm inside out, and Tempe received funding to create a gathering place dedicated to raising awareness of encore opportunities.

Tempe Connections launched in 2004 within the main branch of the Tempe Public Library, at the time a unique setting for an encore outreach effort. Modeled after the Mathers café program in Chicago, the Connections Café began as a gathering place for socializing, educational programs and life planning workshops and opportunities for civic engagement. Tempe Connections was a program offered by the Friends of the Tempe Public Library. A citizen's advisory committee, including Goldberg, formed to help manage the program in its early stages.

As the program drew interest, Goldberg and others wanted to offer more organized volunteer opportunities. “The main focus we felt was to really take a look at community engagement activities and up the ante from what we were providing, which were ad hoc opportunities that weren’t very structured or directed,” says Goldberg.

Encore.org was then running Experience Corps, and a program focused on education seemed like a good fit for Tempe, a college town. “We felt that we had the right mix of community interest, involvement and a strong history of partnering with our school districts,” says Goldberg.

With funding from Piper Trust and AmeriCorps (through Encore.org), the Tempe chapter of Experience Corps launched in 2006 with 15 volunteers in three schools. The City of Tempe managed the program, and Goldberg, still a city employee, spent nearly 75 percent of her time on the launch. The city provided fiscal management, office space and equipment. Initial funding also covered a part-time program coordinator and assistant coordinator. A contracted literacy specialist and volunteer data evaluation specialist were also brought on board. Both specialists still work with the program, and the data specialist was an Encore Fellow in 2012.

Goldberg, who retired from her government job in 2012, now works for AARP as the Experience Corps Volunteer Advisor (a paid position). One of her key responsibilities is strengthening the volunteer pipeline and advising on best practices in volunteer management in the 22 cities where Experience Corps operates.

The Connections Café still offers programming and a gathering place through the library.

MAKING A DIFFERENCE

- Launched in 2006 with 15 volunteers in three schools.
- Currently 82 volunteers in nine schools.
- In the 2012-2013 school year, 98 percent of teachers rated Tempe’s AARP Experience Corps volunteers as being good or excellent.
- Sixty percent of students whose reading skills were rated below grade level had reached district assessment benchmarks by the end of the school year.
- Expanding to the City of Phoenix in the fall of 2014, launching in 10 schools and aiming to recruit at least 80 volunteers.

LESSONS LEARNED

Bringing in an existing program with a known track record can make for an easier sell to schools.

- The Experience Corps model was solid and in line with the goals of the Tempe school district.
- It helped that as a longtime city employee, Goldberg already had strong relationships with leaders of the school district.
- The Experience Corps program had defined parameters that could be tailored to the preferences of individual schools. Some wanted the tutoring offered during reading instruction time; others scheduled it outside of the reading block. The program was adapted to accommodate those preferences.

Evaluating the needs of local schools helped amplify the ways Experience Corps could be effective.

- Goldberg recruited an education expert to pinpoint what local schools needed most.
- She engaged a literacy consultant to develop training and curriculum. The goal was to reinforce work already being done in the classroom.

Tap city resources.

- Because Goldberg worked for the City of Tempe, she was able to use government resources to get the word out about the program.

Measure the impact.

- Tempe's Experience Corps conducts regular surveys with all stakeholders—principals, teachers, volunteers and parents.
- Experience Corps also assesses student reports for qualitative and quantitative changes.
- In surveys, volunteers frequently report the draw of the program is the chance to establish a meaningful relationship with a child and the opportunity to provide much-needed social and emotional support.
- Volunteers value knowing the impact of their service.

"We felt that we had the right mix of community interest, involvement and a strong history of partnering with our school districts," says Goldberg.

Sticking to a structure improves the volunteer experience.

Tempe's Experience Corps was initially concerned about not recruiting enough volunteers and agreed to be flexible about schedules and did not always heed to the defined twice-a-week schedule. That flexibility created instability, so the next year people who couldn't commit to the schedule were turned away. The result: more committed volunteers and strong retention. The program has a 90 percent retention rate, and most volunteers stay on board at least three years, says Goldberg. Those who leave usually do so for personal reasons, not dissatisfaction with the program.

Sticking to a structure also improves the ability to measure impact.

In the first year, Tempe's Experience Corps allowed volunteers too much leeway to try different approaches and bring in their own teaching materials. "We erred on the side of saying 'yes, yes, yes,' and learned that was not the way to go," says Goldberg. Without a standard protocol in place, analyzing impact was difficult. Once all volunteers followed a set structure and curriculum, it became possible to track and measure impact – and to better observe and assist volunteers if they were having difficulty.

Engage community partners.

In the first years, Goldberg worked exclusively on internal operations within the schools rather than on developing a base of community support. Building in program promotion through presentations that outline the goals and opportunities of Experience Corps to local nonprofits and other community organizations helped bring in both funding and volunteers.

Keep fine-tuning.

You can plot a course and find that the reality is not what you had envisioned. Adjust constantly. This year, Experience Corps tried out a new approach for gathering feedback from reading coaches by sponsoring a lunch to honor the coaches. Bringing them together in one place generated more energetic brainstorming and sharing of ideas about issues the coaches were seeing and ways to address those issues.

Rewarding leadership and raising awareness

PIPER TRUST ENCORE PRIZES FOR EXCEPTIONAL ORGANIZATIONS AND PIPER TRUST ENCORE CAREER PRIZE

WHAT IT IS

Piper Trust prize programs showcase what can be accomplished with encore talent. Piper Trust established two prizes to further advance its initiative to strengthen civic engagement opportunities for older adults. The first, the *Piper Trust Encore Prizes for Exceptional Organizations*, recognizes nonprofits and public agencies that utilize the experience and talents of older adults in significant ways. Up to three organizations receive a \$5,000 award, and one of the three may also receive a \$50,000 Encore Enhancement Prize to expand its use of experienced older adults. The second, *Piper Trust Encore Career Prize*, recognizes an encore role model, age 50 or older, who initiated and is leading a new social purpose endeavor.

The prize programs, offered in alternating years, are based on Encore.org's Purpose Prize for individuals and MetLife Foundation/Civic Ventures Encore Opportunity Awards (originally called the BreakThrough Award) for organizations. The first organizational prizes were awarded in 2012, and the first individual prize was awarded in 2013.

Piper Trust awarded its first organizational prizes in 2012 to three organizations in which encore workers play an integral role:

- Mesa United Way, cited for its "Meaningful Opportunities for the Richly Experienced" program. Mesa United Way has placed some 140 individuals in a variety of encore roles with area nonprofits. The short and long-term assignments include tax preparation for low and medium income individuals; coaching unemployed people on their resumes and interviews skills; and helping veterans find and apply for social services.
- Neighbors Who Care, a nonprofit that relies on a small paid staff of encore workers and more than 500 encore volunteers to provide services for the homebound, including Medicare advising, bill paying, home repairs, transportation and meal delivery.
- Mission of Mercy – Arizona, which runs several mobile medical clinics that provide free health care and prescription medication to around 6,000 uninsured patients a year. About one-third of Mission of Mercy's 350 volunteers are medical professionals – mostly retired doctors, nurses, technicians and pharmacists.

Each organization was awarded a \$5,000 prize. Mission of Mercy was awarded an additional \$50,000 Encore Enhancement Prize. The organization is using the funds to expand and enhance its volunteer communications and outreach to recruit more age 50+ volunteers and will ultimately implement a software system that will help measure and track the value of volunteer services provided and enable volunteers to more easily engage with the organization and with each other. A year after receiving the prize and expanding outreach, Mission of Mercy had signed up more than 100 new volunteers, most of them encore workers, and the value of donated hours jumped nearly fifty percent. "It's been a wonderful, wonderful boost for us," says executive director Catherine Amiot. "We are so fortunate."

Piper Trust awarded its first Encore Career Prize of \$50,000 in 2013 to Mike McQuaid, a commercial real estate developer, who helped create and is board president of the Human Services Campus in Phoenix. Dedicated to ending homelessness, McQuaid conceived of the campus, which hosts more than a dozen agencies that provide social services to around 1,000 homeless people each day. Situating the agencies in one destination makes access easier. "I was very honored that they chose me to be the recipient of such a prestigious award," he says.

HOW THE PRIZES PROMOTE THE ENCORE CONCEPT

They define encore. Individuals must have initiated a social purpose endeavor and led it for at least three years. Organizations must have a track record that shows they are using encore workers in strategic ways. The strongest contenders are nonprofits that can outline the specific ways their encore workers contribute to the enterprise and that provide encore workers with some form of compensation, such as a stipend, health insurance or office space. The goal is to highlight the impact that can be achieved by recognizing the technical expertise and leadership skills of experienced individuals and incorporating them into the essential work of an organization.

They raise awareness. The aim is to get organizations to realize that they may already have encore talent in-house and that they can leverage that experience. Encore is about intentionally seeking out those folks and crafting engagement strategies that utilize their talent and experience.

They reward local efforts. Unlike the Purpose Prize, which recognizes encore work done by U.S. citizens anywhere around the world, Piper Trust's prizes highlight encore work in Maricopa County.

LESSONS LEARNED

The media loves the story. Press coverage of the prize-winning organizations and individuals increases awareness and interest about the value of encore engagement. The Trust also works to generate buzz via social media. Communications efforts are worth the time and ongoing commitment.

The Trust's selection process includes staff members and a committee of encore experts from local and national organizations. Having a mix of reviewers "adds an unbiased perspective and broadens the reach, understanding, and growth of encore," says Karen Leland, Piper Trust's director of communications and external relations. The selection committee recommends award recipients to the Trustees of Piper Trust for final review and approval.

Honoring organizations brings the encore conversation to the social sector. Recognizing organizations as well as individuals demonstrates the value that experienced adults can bring to nonprofits and social needs agencies and can inspire nonprofits to expand or implement their own encore engagement strategies.

Communications that define encore is an important component.

Sixty-one organizations applied for the first prize awarded in 2012. Many didn't meet the criteria, because they didn't fully grasp the encore idea. Piper Trust continually develops documentary-style videos and other materials to help individuals and organizations understand strong encore efforts in the community and how to become engaged. These materials provide concrete examples that clarify what it means to incorporate encore talent into an organization's team. While the number of applications for the 2014 award went down, the submissions showed an increase in encore understanding, says Leland.

Replacing the frailty model of aging services

MARICOPA ASSOCIATION OF GOVERNMENTS GREATER PHOENIX AREA AGE-FRIENDLY NETWORK

WHAT IT IS

The Age-Friendly Network is an intergenerational initiative launched in 2011 by the Maricopa Association of Governments (MAG). The Network's goal is to engage community members of all ages to address issues that concern adults over 60 and identify and create opportunities for them to connect and contribute to the community. Through several pilot projects, the Network provides information and resources on a range of topics – from services that allow people to remain living in their homes to encore opportunities that tap individual skills and talents.

An essential element of the Network is its link to local elected officials who have provided political backing to make the changes that are needed for the project to succeed. Key officials, such as City of Phoenix Mayor Greg Stanton and former City of Avondale Mayor Marie Lopez Rogers, have recognized the need to develop encore talent and have raised awareness of aging issues with municipal officials across the country.

MAG, a regional planning agency comprised of the county's 27 cities and towns and three Native American communities, received key funding for the Network initiative from Grantmakers in Aging and the Pfizer Foundation with matching funds from Piper Trust.

WHAT IT DOES

The Network assists communities to expand ways to include and provide services needed by older adults and provide information to older adults about the variety of ways to engage with the community including through encore work. It provides a communications hub, Connect60plus.com; helps pinpoint groups and areas in need of assistance through demographic analysis; and offers trainings and conferences that bring together nonprofits, local governments and community members.

Collaboration is a driving engine of the Network as multiple stakeholders – local government; faith-based communities; nonprofits; and foundations – work to build community capacity and create sustainability. The local government often serves as the incubator and convenor. The Network provides a way for “local government to be involved without it feeling like an ATM,” says Amy St. Peter, the MAG human services and special projects coordinator.

*“It’s far more effective to
meaningfully and fully integrate
instead of compete,”
says St. Peter.*

Three pilot projects have launched, each with encore volunteers serving in key leadership positions on the board and as executive directors. Six other pilots are in development. The pilots include:

Central Village. An innovative community that functions as both a village and a time bank project in which members of the village exchange skilled and non-skilled services. For every hour of service a member provides, the member earns (“banks”) an hour of service. The president of Central Village’s board and three board members are encore volunteers as is the time bank coordinator, the group’s only paid position. The time bank, which aims to connect members, keep them active and tap their talents and skills, is hoping to hire an Encore Fellow to develop a community engagement strategy, says Julie Bordelon, a community initiatives specialist for the City of Phoenix.

Tempe Neighbors Helping Neighbors. A membership village that helps residents of all ages team up to provide services to each other. Its current focus is providing transportation and basic home services. Three board members, including the president, are encore volunteers, and the group has also brought on a Service by Design volunteer (via Experience Matters) to create a marketing plan.

Northwest Valley Connect. A partnership of two nonprofits. A key focus is providing transportation to those in need. Several of the nine board members are encore volunteers. The project’s business plan anticipates relying on some 50 volunteers to fill key positions as drivers, call center operators and community ambassadors spreading awareness of the program. The expectation is that most volunteers will be retired adults, says Jennifer Drago, executive vice president of population health, for Sun Health, one of the nonprofits organizing the project.

LESSONS LEARNED

Realize that traditional aging services providers may not initially see the value in new programming. Some traditional agencies were reluctant to see why innovative programs were needed or how they would improve on services already offered. Instead of shutting out resistors, St. Peter found ways to help them to build capacity. Central Village, for instance, has partnered with a more traditional nonprofit that provides services like transportation and grocery shopping for older adults. Instead of competing for volunteers and funding, Central Village and the nonprofit are mutually supporting each other. “It’s far more effective to meaningfully and fully integrate instead of compete,” says St. Peter.

Use demographic data to generate local support and pinpoint areas where different kinds of services and programs would be most effective.

Connect existing funder strategies to encore-friendly work.

Strategically identify partners and articulate business models for each project.

Avoid turf wars. Keep in mind that money for a new program may take money away from an old program. Identify the ways a new project provides mutual benefits.

See beyond the frailty model of aging. When designing conferences and programs, the MAG leadership team worked to make sure they were covering the full spectrum of activities that could both aid and engage older adults.

MAKING YOUR TIME COUNT

The Network is changing the conversation and view of aging away from the model of frailty by encouraging residents to connect and engage and helping them find purposeful ways to become involved in their communities. A key goal of the Network grew out of an initial survey in which local respondents said that “living well isn’t about counting time but about making your time count,” says St. Peter. Older adults are driving the work and the planning, and the network is creating new opportunities for involvement as well as connecting older adults to existing opportunities. “I’m there to support,” says St. Peter. “I’m more of a kind of cheerleader. Part of what’s so neat is that everyone owns it. Everyone is sharing so freely.

Improving the student experience

RIO SALADO COLLEGE 50+ ENCORE PROGRAMS

WHAT IT IS

Rio Salado College, one of ten colleges in the Maricopa County Community Colleges District, provides both community-based and online learning. Its 50+ Encore Programs offer online teacher certification to older adults who want to pursue encore careers in early childhood, elementary, secondary, special education and arts education. Encore 50+ was launched in 2009 with a grant from the MetLife Foundation/Civic Ventures Encore College program.

The program builds on Rio Salado's expertise and commitment to online learning and its work since 1999 to offer undergraduate and master's level teaching certificates through online learning. It offers several options for encore seekers whether or not they have a college degree. Some take online classes while working fulltime. Others work in the classroom through the Teacher-In-Residence Intern Program while completing online coursework toward certification.

When the Encore 50+ program was developed, one of its key aims was to improve encore student support by hiring a success coach who could address student career concerns and technical issues. "We wanted to put someone in place who understood what that person was bringing back to the classroom as far as work experience and who also could address the anxieties of doing an online program," says Kimberly Tobey, Rio's director of teacher education innovations and initiatives.

The initial success coach, Jeanne Christen, was working in her own encore career. A former clinical lab scientist, Christen describes herself as "a perfect match" for the position. "I'm already chronologically gifted," she says. Christen, now 73, worked with the encore students on a range of issues – from financial aid to academic advising – and often served as a liaison when encore students felt reluctant to discuss problems with younger members of the college staff.

"They struggle with that perceived disconnect of online,"
says Debra Zurcher.

LESSONS LEARNED

Make the time commitment and rigor of the program clear. Some students have withdrawn because the program was more demanding than they originally expected. People think something that is largely online is going to be easy and may not factor in the classroom work and other in-person activities that are required.

Develop creative marketing approaches that engage and prepare encore seekers. Emphasize the potential for rewards – both personal and financial – and the ways individuals can use their past careers and real life experience in the classroom to make a difference for children and youth. The outreach should be realistic about the commitment and time required by both the certification program and a teaching career.

Combine online learning with personal connections. Encore students want more in-person interactions that foster community. “They struggle with that perceived disconnect of online,” says Debra Zurcher, Rio’s current online teacher program student success coach.

Develop encore-specific support. Zurcher works with all students in the online teacher program, not just the encore group. She plans to launch a monthly in-person café gathering to give encore students the opportunity to connect and get individual help, and she may also hold separate in-person orientation sessions that would be tailored to encore students and help them establish a community.

Recognize the different needs of encore students. Many have to deal with family problems or health issues for themselves or their parents. While encore students are often more responsible about speaking up when there’s a problem, they may benefit from added flexibility to deal with their life issues. “It’s just being understanding about the student as a whole,” says Jennifer Gresko, Rio’s faculty chair of teacher education and eLearning design. “That’s the importance of our student success coach. We put a lot of energy and time into figuring out where someone is struggling.”

ARIZONA NEEDS TEACHERS

Many have retired or left the profession leaving a gap – and creating opportunities for Rio Salado graduates. Since 2001, 300 encore students have completed the program, including 48 who finished in 2013 and 24 who had completed as of August 2014. In September 2014, 341 students were enrolled in the 50+ program.

Work across departments to develop understanding and buy-in for encore programs. Make sure staff understand the needs and opportunities associated with encore students and that encore students may have different preferences or perspectives in areas like academic advising and financial aid. Success coach Christen found many encore students were concerned about confidentiality issues when turning over personal financial issues. Make sure departments understand and deal respectfully with encore students on such matters.

Foster intergenerational relationships. Acknowledge the challenges of being assigned to work with a student teaching mentor who's much younger and offer guidance on how to navigate that relationship.

When possible, match encore students with a liaison in their own age group. Success coach Christen found that younger staff members often didn't understand the concerns of encore students. Encore students who had held senior leadership positions in their former careers needed guidance on dealing with younger staff.

Address how technology has changed the classroom – and the role it plays in the lives of students. Encore teachers need to be encouraged to stay open and understand the role of technology as an education tool. Extra support on multimedia projects like developing a class web site can help most get past technical obstacles.

"Encore students may need added flexibility to deal with life issues. We put a lot of energy and time into figuring out where someone is struggling,"
says Gresko.

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