

**DOING GOOD BY DOING WELL:**  
ENCORE FELLOWS BUILD NONPROFITS'  
CAPACITY TO SERVE CHILDREN AND YOUTH

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## **Table of Contents**

<b>Introduction</b> .....	3
<b>Encore Fellows: Case Studies</b>	
Cheryl Edmonds, Metropolitan Family Service (OR).....	5
Blake Sacha, Science Foundation Arizona (AZ).....	9
Donna Garban, Green City Force (NY).....	12
<b>Summary and Conclusions</b> .....	15
<b>References</b> .....	17
<b>Appendix: Methodology</b> .....	18
<b>Interview Guide</b> .....	19

## EXECUTIVE SUMMARY

Later life in the 21<sup>st</sup> century, often characterized by increased longevity and good health, offers many older adults the promise of engaging in activities that promote the social good. Encore.org, a national nonprofit, seeks to harness the experience and talents of millions of people in later life as a vital source of talent to benefit society. This article assesses the impact of one form of encore talent – Encore Fellows – in youth-oriented nonprofit organizations.

The Encore Fellowships Network® (EFN), created by Encore.org, is designed to deliver experienced talent to organizations solving critical social problems via paid, time-limited fellowships that match skilled professionals with social-purpose organizations in high-impact assignments. Additionally, the program seeks to demonstrate in the most practical terms the value of encore talent to the nonprofit sector, in order to drive change in nonprofit hiring practices.

To understand the impact of Encore Fellows, this article profiles three individuals. Each brought years of business experience to the nonprofit environment. Each possessed a unique set of skills developed over a lifetime of work, and a desire for a different life, one that combined a greater sense of mission with the desire to contribute to their communities. Each had to learn the business and the ropes. The fellows profiled are:

**Cheryl Edmonds, placed with Metropolitan Family Service, Portland, OR**

**Blake Sacha, placed with Science Foundation Arizona, Phoenix, AZ**

**Donna Garban, Green City Force, New York, NY**

Fellows, their colleagues and organization leaders were interviewed about their experiences. Despite diverse placements, prior work experience and fellowship assignments, certain observations were consistent:

- Program operators and hosts used EFN resources to secure good matches.
- Work host leadership integrated fellows into the fabric and culture of their organizations, with broad access to personnel and leadership.
- Fellows and hosts learned to listen and learn together, in on-boarding processes that generally spanned 90 days.
- Organization leaders were open to new ideas and fellows ably made cases for new approaches.
- Fellows developed and executed plans with a high degree of independence.
- The nonprofit hosts credited Encore Fellows' contributions to the organizations' missions and bottom lines as highly professional, impactful and constructive.

Conversations with fellows, colleagues and organization leaders considered fellows' project management skills, "people" skills, flexibility, motivation, initiative and degree of openness to learning a new organization's culture, vocabulary, mission and programs. In general, these attributes were consistently highlighted as essential to the success of Encore Fellows.

All three Encore Fellows profiled left a lasting, positive mark on the organizations they served, including the creation of an Encore Consultant Program (Cheryl Edmonds, at Metropolitan Family Service); an expanded network that led to a 10-fold increase in business partners (Blake Sacha, at Science Foundation Arizona); and development of programs that improved the organization's bottom line and leadership pipeline (Donna Garban, at Green City Force).

The fellows also experienced learning and growth. All continue to support the causes of the organization they served. One continues to actively support special projects at her nonprofit work host; two have transitioned to long-planned "second act" careers.

These three fellows are exemplars of many experienced individuals, who are willing, able and eager to make similar contributions to sorely needed social-purpose projects. The durable impact of their contributions should encourage nonprofits to tap into this growing pool of talent and expertise to help tackle vital issues and problems with the smarts, finesse and ability that experience confers.

As more nonprofit organizations become aware of the impact that Encore Fellows and other mature, experienced workers can deliver to social-purpose organizations, the number of opportunities to serve will rise to meet the availability of skilled, mature talent, seeking a chance to give back.

## INTRODUCTION

The Encore Fellowships Network® (EFN) program was created to deliver a new source of experienced talent to organizations that address critical social problems. These paid, time-limited fellowships match skilled, experienced professionals with high-impact assignments. The EFN includes the following elements:

1. **Program Operators**, typically local nonprofits, match individuals with nonprofits or public-sector agencies to build capacity and accomplish their mission.
2. Individuals apply to become **Encore Fellows**, working for a stipend, usually part-time, for a period that averages six months to a year, in a local nonprofit or public-sector organization.
3. Community-based nonprofits or government agencies serve as **Encore Fellowship Hosts**, providing high-impact assignments to the fellow and paying at least part of the fellow's stipend.

One objective of the EFN program has been to demonstrate the value of this source of talent to the nonprofit sector in order to affect change in the hiring practices of nonprofit organizations. Publicizing information about the transformative power of Encore Fellowships will increase demand for encore talent in the nonprofit labor market.

A Boston College research team was commissioned to provide case studies to complement a quantitative study by Encore.org, by articulating how Encore Fellows affect their host organizations. These case studies assess and describe the impact of encore talent (Encore Fellows) in nonprofits serving children and youth. (Study methodology is detailed in the Appendix.)

Little systematic research documents how older adults in nonprofits, or Encore Fellows in particular, exert their impact. Without such knowledge, nonprofits may be reluctant to invest in encore talent. As noted by Sternberg (2000), implicit theories of success derive from stories of success. These stories provide insight into the unique pathways of the “leading edge of phenomena” (Bronk, 2012; see also Colby & Damon, 1992; Damon, 2004; Van Deusen, James, Gill, & McKechnie, 2007). The research team and Encore.org identified a subset of fellows deemed to have brought significant, sustained organizational and cultural impact to their host organizations and sought to identify common factors in this level of success.

### Profiles of Partnerships

The three Encore Fellows profiled in these case reports served at nonprofits across the U.S. Each nonprofit's mission shared a focus on children and youth, while targeting diverse programs and projects.

Fellows, hosts and colleagues reflected on the fellow's strengths and challenges, motivation and sense of purpose, and a suite of professional skills: project management, “people” skills (networking), experience, emotional maturity and impact.

The three nonprofits are summarized below.



**METROPOLITAN FAMILY SERVICE (MFS) Metropolitan Family Service**, based in Portland, Oregon, empowers families to learn, to earn, to heal and to thrive. Part mentor, part motivator, part advocate, MFS provides a wide variety of programs and services designed to strengthen families and help them realize their full potential.

The organization, founded in 1950, strives to move people beyond the limitations of poverty, inequity and social isolation. It serves about 3,000 individuals of all ages in the Portland metropolitan region and in southwest Washington. MFS works as a “prevention organization” in over 33 schools in low-income communities, providing afterschool services and connecting family to services that can help them live better lives. MFS works with children and schools and provides parent education; they also have a very large program for older adult program that includes transportation and home visiting. “They cover the whole age range of need for people in the community,” Encore Fellow Cheryl Edmonds said.



**SCIENCE FOUNDATION ARIZONA (SFAz) Science Foundation Arizona** is a collaboration between businesses, educators, government and philanthropy with a common agenda: To graduate more Arizona students prepared for the global economy through science, technology, engineering and mathematics

(STEM) education. The organization was founded in 2006 by then-Governor Janet Napolitano to promote economic development within the state of Arizona. It provides graduate and postdoctoral research fellowships and some funding for research. It also hosts the Arizona STEM Network, including business, government, philanthropic and educational partnerships and awards, monitors and assists with grants to school districts for running STEM programs. According to Encore Fellow Blake Sacha, “SFAz works to improve science and math STEM education across the state of Arizona in three ways: by providing research and fellowship grants, by running educational programs and through [interactions with] the STEM network, which is a group of like-minded folks from many organizations who are interested in [STEM] an helping them to work together.”



**GREEN CITY FORCE (GCF) Green City Force** is an AmeriCorps program that engages young people from low-income backgrounds in national service related to the environment. In doing so, GCF prepares them for sustainable careers, while reducing greenhouse gas emissions and building the green city GCF envisions. According to executive director Lisbeth Shepherd, “GCF connects the dots between youth and

employment in low-income communities on the one hand and climate change and the need for cities to take action to address climate goals on the other.”

To achieve these goals, GCF recruits young people who live in public housing where there are high youth unemployment rates and also, great environmental need. These young people become part of GCF’s full-time service program. They earn stipends and get work experience as they develop essential skills. Their service also includes exposure to career paths related to sustainability, energy efficiency and renewable energy. GCF supports their progress into work or higher education by helping them develop resume-writing, interview and communication skills, while building a community of alumni who are both changing their own lives and creating positive change in their own communities.



**Cheryl Edmonds:  
Assignment, Design and Test a New Encore Consultant Program**

After a near-18-year career at Hewlett Packard and the offer of an early retirement package, Cheryl Edmonds was ready for a different kind of impact. High tech was “wonderful up to a point, but it lacked heart.” Cheryl had a long “bucket list” that she set out to check off, first by becoming the director for a startup in online blindness education and later, spending time in China teaching English. When she returned to the U.S., she learned about the

Portland EFN program through a former HP colleague and was selected to become a member of the city’s first cohort of Encore Fellows.

Her assigned task was to enhance volunteer development opportunities, working specifically with local businesses to promote volunteerism among baby boomers.

Cheryl worked within MFS and – because her assignment involved setting up an Encore Consultants program for MFS partners – with other nonprofits in the area to create new volunteer opportunities that address both the program needs of nonprofits and the expectations of potential volunteers. She developed and implemented a plan for an enhanced and comprehensive volunteer program and improved the volunteer experience at MFS, building on the Encore Fellows program model.

Rolling up her sleeves, she began asking program managers, if money were no object and you could bring in talent to help you build your program, what would that project be? When presented with ideas, she would alert them to the possibility of finding someone who could help them carry out some of these “dream” initiatives. Sometimes her respondents expressed concern about whether the added benefit was worth the effort— would the Encore Fellow try to take over or require a lot of ‘babysitting?’ She would then explain that if the fellow was brought in, given background on the organization, presented with a clear project plan with realistic expectations and informed of the leader’s level of involvement and communications style, the benefit would be far greater than the cost. She would say something like the following:

“What you should expect is that these are really highly competent, highly motivated people who know what you want, and know how to access the resources, [so my advice would be to] get out of the way and let them do it, because that’s what they are going to want to do . . . [they] do not want or need to be micro-managed.”

With her no-nonsense approach and MFS senior leadership support, Cheryl identified two projects to pilot. The pilots worked well within MFS and Cheryl felt ready to extend the idea to other local nonprofits.

Taking a similar approach to nonprofits outside of MFS, she invited organizational leaders to develop project descriptions that would increase their capacity to deliver services, and recruited encore-stage volunteers with the right skills to carry out the projects. In doing so, she put together a comprehensive Encore Consultants program. The toolkit included a clear recruitment and on-boarding process which made it possible to place “high caliber, 50+ people who could help agencies do capacity building projects” in local nonprofits. Unlike the Encore Fellows, however, these consultants were unpaid volunteers who were committed to shorter projects and fewer hours of work. The program was tested over the 12 months of Cheryl’s fellowship and was, by all accounts, very effective.

As Judy Strand, MFS CEO, said,

“I saw her innovative spirit and her ability to move us beyond where we were. I felt . . . she was a person who challenged us to think in new ways and I really welcome that kind of leadership . . . I just felt that she had the personal integrity and commitment and the strictness to get this done, despite the fact that we both knew the work was not going to be easy.

It was just a sense that I could really trust that she would follow through, both personally and professionally. We’ve been working with her ever since in different capacities. She has done a whole lot of project management for us since her fellowship ended that’s really benefited the organization.”

## **Strengths and Challenges**

According to Matt Bartolotti, chief strategy officer and deputy CEO at the time, “At first, Cheryl spent a lot of time understanding the agency culture and getting a really good grasp . . . of the organization’s strengths and interests.” She worked with leaders to find a common vocabulary, as some of the terms she carried from her business perspective did not seem pertinent to her nonprofit colleagues. She and the COO learned to communicate. Cheryl was open to feedback and strategies for blending the two cultures, retaining the most important strengths of each. From Cheryl’s perspective, coming from high tech, “which is a fast-paced, rapid turnaround world, to the nonprofit pace, where the organization is working on intractable problems, [meant that I] had to accept that they are not going to solve poverty overnight.” Cheryl said that she had to become familiar with nonprofit work styles and decision-making, members’ passions and beliefs, new metrics, board interactions and more. Cheryl and her COO developed a very close relationship in the process.

According to Bartolotti, Cheryl has an uncanny ability to keep projects moving and avoiding “scope creep” – often a challenge for organizational leaders. “She is completely knowledgeable about, and up to date on, the whole encore space (‘second act careers’), and has brought that knowledge to us so that we could use that model for encore work that we wanted to provide to our community nonprofits.”

Bartolotti also said that Cheryl built a reputation for getting things done:

“She brought a no-nonsense approach to project management . . . [She would say] ‘Okay, this is what we are doing; is it working? If it’s not, tell me. It’s nothing personal; it’s just kind of business.’ . . . Her intent was to move the project along. She just has pretty high standards as a business person and is a ‘straight shooter.’”

Colleagues noted Cheryl’s many strengths:

**Motivation and purpose.** “I sense in her a kind of intellectual curiosity and passion. She is able to kind of give that intellectual curiosity and passion to us, which really seems to be highly motivating. I mean, she just has pretty high standards as a business person.”

**Initiative.** “She was an amazing self-starter . . . she really did her homework and she made it easy for me . . . she is a highly creative person and she looks beyond what most people look beyond.”



**Solid, thorough and reliable.** “Her follow-through was just so solid. There was no hesitancy about going forward with the work we were doing together ever, because I knew I could 100 percent trust her to be there and manage it.”

**Project management skills.** “Cheryl’s project management is very strong . . . Even when problems came up, which they inevitably do, she was a great problem-solver and stepped in at just the right level. It was just sort of a complete capacity to manage this new project and yet bring in some new creative thinking.”

**People skills.** “As a consultant to vendors, Cheryl is just amazing at keeping our interests at the center of her negotiations and she does it with a commitment to kind of open and transparent business ethics . . . but she does it respectfully, cordially, in a solution-oriented manner.”

“I saw her as becoming a natural mentor for our senior staff . . . in a very quiet way. She so easily could step into that role, and yet maintained all the boundaries where they needed to be and offer insight.”

## Impact

Several colleagues mentioned the positive impact of Cheryl’s life stage on her work and their opinions of encore talent:

“Cheryl has definitely made us aware of the depth and strength and power of the 50+ crowd and what they can contribute to the nonprofit sector. I think the deeper and richer understanding of that talent pool certainly came as a result of that. We also embraced that overall philosophy and belief that intergenerational work is important”

“[Her life stage] was absolutely crucial to the success of the partnership. I think that her capacity to be reflective, particularly when we ran into differences in our cultural norms or problems that would occur [meant that] nothing ruffled her. Her comfort and her wisdom really came through.”

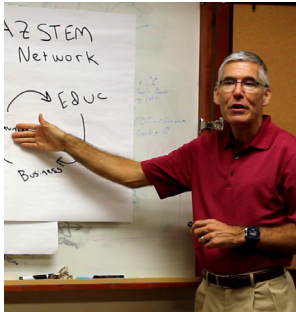
“I don’t think she would have had the kind of time or flexibility to pursue something like this if she were not where she is in her life stage.”

According to MFS CEO Judy Strand, Cheryl came to understand the organizational culture, their interests and their capacity gaps. Cheryl provided leadership with administrative/management functions, not direct services. In that capacity, Cheryl implemented an Encore Consultants program for encore-stage volunteers that could carry out needed projects for nonprofit organizations on a short-term basis. Via her program, MFS was able to place numerous “high-level, 50+, ‘second-act’ types of people in local nonprofits.” She developed a “messaging matrix” to suggest language for different audiences and helped with MFS rebranding and created programs that helped other agencies meet their program goals.

Cheryl also studied the Encore Fellows program extensively before developing the MFS Encore Consultants program, in the process, becoming a knowledgeable advocate. As Cheryl noted, pro-bono professionals who have the time, energy and desire to contribute are plentiful. “You just have to help them funnel their interests in the right places.”

“It seems like the most natural thing to do—to really embrace this idea of aging for those of us that are coming out of the 1960s era; a lot of us haven’t lost that fervor. To be able to come back through this route, and do something that really does have social impact is such a wonderful opportunity.”

Cheryl continues to work with MFS on special projects, helping to build capacity in myriad ways—adding a social enterprise element to the Encore Consultants program, helping MFS to improve their messaging, building a state-of-the-art website and creating an agency-wide database for proving and improving MFS’s impact.



### **Blake Sacha: Assignment, Systematize and Grow Science Education-Business Partnerships**

After a 28-year career at Intel Corporation, chemical engineer Blake Sacha wanted to get involved in science education. A new company-wide retirement package, which Intel made available to all U.S.-based retirement eligible employees, included the offer of an Encore Fellowship. Blake explained, “I wanted to have a chance to have an impact on education and make a lot of contacts around the state. I chose the Encore Fellowship at SFaz for the perceived opportunity to use my skills and to learn.” Ultimately, Blake’s encore career goal was to teach chemistry at the community college level.

Blake was tasked with designing a systems approach for the Arizona STEM Network, led by Science Foundation Arizona. The work ranged from designing a knowledge management system to scaling business involvement in education. He was asked to assist the director of the network in establishing partnerships. As a key aspect of the project, he was asked to examine business and industry within Arizona to determine which skills were lacking in the workforce and recommend school programs to help develop those skills.

Blake organized the network and worked with the information manager to launch an online site that allowed people to join the network for free. They populated the site with resources for STEM teachers and posted opportunities for business partners to work together or with schools to enhance the STEM focus in Arizona. There was “heavy emphasis on workforce development,” said former SFaz director of education John Kreikard, who also noted: “Blake made individual calls, traveled to various businesses [related to STEM], and gave speeches in front of large groups . . . talking about the Arizona STEM Network and how they could be involved and contribute. Through his efforts rolling out the online collaboration site, his personal contacts and his individual work, we increased the number of business partners 10-fold, and created an alive and functioning business-advocates program.”

Midyear in Blake’s fellowship, the director of the STEM Network resigned, and Blake was asked to step into that role. According to his colleagues, Blake rose to the challenge with a steady hand, and developed a structured strategic plan for the network. Along the way, he also repaired a partnership with a major funder.

### **Strengths and Challenges**

Blake’s transition from the corporate world to SFaz was challenging. “I went [from a] 100,000- person company to a small nonprofit. It was great, it was very different and I quickly realized that people just didn’t have the training, the background and so on that you just kind of naturally get when you work for a big company . . . you have to take a lot more time to explain and communicate . . . You have to be willing to do just about anything, whether it’s find your own paper or bring your own laptop. You certainly don’t have the resources and supplies. On the other hand, there are very few rules, so you don’t have the bureaucracy. It was very different but I really appreciated the opportunity to work with folks in that kind of environment.”

According to Linda Coyle, the manager of educational programs during Blake's fellowship, Blake's easy-going personality fit in perfectly. "First of all, he came in and took it as a learning experience. He attended every meeting he could so he was definitely an initiator in trying to learn and understand our small organization. He didn't come in and say, 'I have all the answers and this is how you should do it.'"

Blake's experience in strategic planning meant he liked helping a group of people craft a vision and a mission. "I have the ability to get a group of people together and help them be effective. I am very open to working with lots of different people and styles, but I also have pretty high expectations for getting results and demonstrate that to folks, so it was a very effective partnership." According to Coyle, Blake was "very systematic, very organized; he knows how to run meetings and stay on track. He has great attention to detail."

Several colleagues outlined Blake's strengths:

**Motivation and purpose.** "He had a high interest in helping schools and helping young students . . . he saw working with us as an opportunity to further enhance education in the state."

**Project management skills.** Blake "knows how to organize things, he knows how to chart things out; he knew how to remain focused on the important things," said one. "He is a systems thinker," said another colleague. "He is able to look at a problem and systematically break it down into manageable steps and schedule those steps for a successful completion of a project."

**Network and people skills.** Blake mobilized a wide network of contacts on behalf of SFAZ. In addition, observed one, "Blake has keen people skills and a very dry sense of humor. He is also very professional in using that humor to defuse the kinds of problems that inevitably arise in a collaborative work space."

Additionally, colleagues praised Blake's initiative and follow-through – and his emotional maturity. "The position that he held at Intel was one of great responsibility. He is a guy that just digs in with both hands and gets work done," said one. "He didn't wait for people to tell him what to do."

"Blake never lets emotion get in the way," according to one colleague. "[His response] is always based on fact, on accommodation, on 'how can I assist you?' and 'how can we look at this for a mutually beneficial conclusion?'"

## Impact

Blake and his colleagues agreed that his life stage was vital to the success of the partnership. These were a few of their comments:

"His work experience was so extensive and focused so he knew how to organize things and how to get things done. He was retired and working half-time, [so] he had normal scheduled days to be with us, but if an important meeting came up on another day, he had a lot more flexibility to meet that demand."

"I think . . . that when people feel they are ready to retire but not ready to stop working, they can be gracious and understanding in sharing their gifts and [your organization] can take advantage of all those resources, their brain power and their experiences. It's terrific."

SFAz experienced significant growth during Blake's fellowship year, largely because of his work there. For example, the organization went from 20 business partners to 200 partners. Blake led the production of a website that helped connect and inform both businesses and schools. His work led to increased communication among SFAz's various constituent groups. Blake's support of strategic planning for the STEM Network led to his service as interim director, until a new director was hired.

Personally, Blake appreciated the opportunity to use his skills and experience to help the organization in multiple ways. Working part-time gave him the freedom to participate in a graduate program and earn a new degree, supporting his transition to an encore career. Today, Blake teaches chemistry in a community college. He stays in touch with SFAz, and hopes to volunteer on SFAz projects.



**Donna Garban:  
Assignment, Develop Income Stream and Leadership**

After a quarter-century in municipal bonds and investment banking, including eight years as a trader at Goldman Sachs, Donna had ample experience with finance and deal-making. Yet in her final years at Goldman, Donna began to feel a need for something different. After completing a course at Harvard on nonprofit management, Donna became the chair of a local nonprofit, where she worked for approximately 18 months. When she learned that she had become an Encore Fellow, she felt that she had found her calling at Green City Force. “GCF was such a great, creative, entrepreneurial place and seemed to be a really good match,” she said. GCF represented just what Donna was looking for when she left Goldman. She said that her GCF fellowship was “the final piece of the journey I was taking toward the nonprofit world and just learning something new, trying something different.”

At GCF, Donna was charged with developing fee-for-service income through contracts that would lead to effective training for GCF participants. She was asked to build up GCF’s existing energy efficiency work stream (the State EmPower program provides services to low- to moderate-income families), to act on new leads (e.g., recycling and composting with the Department of Sanitation) and to identify new contracts that were aligned with GCF’s objectives and strengths.

Donna leveraged existing GCF relationships, fielded calls from interested other parties and developed new contacts. For example, when an elevator broke down in a building owned by the the Archdiocese of New York, with whom GCF had contract for a residential energy-efficiency project. Donna convinced the Archdiocese to hire GCF alumni to help frail residents navigate the stairs while the elevator was being repaired. As Donna said, “[This] ended up being a great work experience for them and a little bit of income for GCF.” As GCF CEO Shepherd noted, “Donna came in with a mission to look at our fee-for-service activities with the goal of expanding those to build up our revenue streams from self-generated sources.”

During her fellowship, GCF’s CFO left the organization. Donna was invited to serve as CFO; she declined, but agreed to serve as interim CFO and lead a search for a new hire. According to Lisbeth Shepherd, executive director of GCF, Donna found Ann Short, the current CFO, via the EFN, just one of many of her contributions to the organization. (She also inspired the organization to hire Encore Fellow Carol Heller to complete Donna’s original assignment.)

“Donna was able, as a senior person, to understand what was really needed and help us. The person we hired [also] happens to be a former Encore Fellow; I think that’s not insignificant in terms of the story that we have to offer,” said Shepherd.

“There was no one other than me who could really take this forward and understand what was needed in screening candidates, even just to know where to start looking. [Donna] was a senior person who had managed people before. She was able to understand the process of looking at candidates, how to screen and all of that. Before Donna, the organization had never had a ‘senior person.’ She brought some seriousness and depth of experience to the organization at a critical time,” said Shepherd.

For a large part of her fellowship, Donna was the only senior-level resource within the organization, other than Shepherd, the CEO. Shepherd said that GCF has now built more of a team orientation. Donna's work with GCF provided structure and support at a critical time, but perhaps her greatest contribution was recruiting other fellows to sustain early efforts and make them grow. The organization thus went from early piloting to actually institutionalizing and being able to have a platform for growth.

## Strengths and Challenges

Adjusting to the job was challenging; Donna indicated that "it was a steep learning curve, disorienting and challenging," but after about 90 days, she understood and was comfortable with her new role. She described having to learn about the energy-efficiency world (the terminology, government involvement, the important players) and get accustomed to differences between the nonprofit and the for-profit cultures. But, she said, "The basics of getting people to hire you are similar in both worlds."

Ultimately, Donna felt that her transactional experience gave GCF a needed set of skills that were amplified by her successors. Below are some strengths that Donna recognized in herself and which were confirmed by her colleagues:

**Motivation and purpose.** Donna observed her personal and professional evolution: "I sort of went from giving money [to nonprofit causes], to board membership, to board chair-ship, to wanting to actually understand what it would be like to work in a nonprofit organization. This was inspired by wanting to be part of my community and wanting to give back."

**Initiative.** An eagerness to learn was instrumental, she said. "I was really ready to try something new and I was receptive as well and I think that was helpful." According to her colleagues, she was also dedicated enough to be able to do something she really loved for much less money.

Shepherd, the CEO, said that Donna was "a total self-starter . . . and I think intuitively understood how she could add value. Donna indicated that she was . . . happy to work without very much direction . . . and in a situation where there are a lot of needs, it's better if you can figure things out by yourself, make a proposal and move forward." Another colleague said, "Donna just knew how to grasp the mission, grasp an objective and then translate that into executable strategies . . . She just generally had a broad skill set. She definitely helped to lay the groundwork for a social enterprise endeavor that's grown this year with our current Encore Fellow."

Green City Force was selected for participation in this study because it had worked with several outstanding Encore Fellows. The nominee whose story is told here, Donna Garban, paved the way for another fellow, Carol Heller, who took up where Donna left off, completing the assignment that Donna began. Donna's assignment shifted mid-fellowship, when she agreed to lead a search and recruitment process for a new chief financial officer. Donna's EFN connections led her to EFN alum Ann Short, who became GCF's director of finance. GCF's current CEO, Lisbeth Shepherd, sees Donna, Carol and Ann as a "trifecta" of encore talent, who have, individually and together, helped to build the young organization:

"These three Encore Fellows have all contributed to . . . [our] capacity to deliver and then to the solidity of our model in different ways . . . the sustainability of our innovative programs, getting those institutionalized. . . . The impact of not just one fellow, but one person who led us to the next person, who brought in a third person, has had a lasting and important impact on the organization's ability to deliver services to our constituents."

For purposes of this report and consistency with other profiles, we focus mostly on Donna Garban, who was the first GCF Encore Fellow who inspired the organization to welcome encore talent. The perspectives of her successors add to our understanding of what makes for a successful fellowship.

This same colleague noted, “[This partnership was successful in part] due to Donna’s ability to just roll up her sleeves, be ready to adapt and not be hung up on what the initial job description was, but be ready to revise that because, for us it was a time of crisis. . . . I just saw pretty quickly that she was able to be flexible for our needs and then I could be flexible for her needs and we genuinely had a meeting of the minds around that.”

**Project management.** Donna’s depth of experience and ability to take the long view was crucial at a time when the organization needed solid problem-solving ability. Having managed people previously, Donna was sympathetic with management, and able to recruit and help to hire new management. She had an “incredible work ethic.”

**People skills.** In addition to being a good listener, Donna’s strong people skills made her very supportive of her colleagues and helpful, working collaboratively and quietly with them to move the organization forward.

## Impact

As with all the Encore Fellows, both Donna and her colleagues felt that life stage and experience were crucial to their success. According to Donna:

“A certain level of patience with human interactions comes with age. I learned when I worked in investment banking that you should listen first and make suggestions later. That’s something I didn’t know earlier in my career; I was always very anxious to change things. I also think that many people feel nervous about performance and whether they are going to keep their job . . . but an Encore Fellow comes in, with a career behind them, and has a certain luxury of not being afraid of anything. . . . I think that comes only with age and helps you to have more perspective on problem-solving.”

GCF’s current CFO, Ann Short, said that “[the Encore Fellows program] provides great opportunity to bring talent into an organization for predefined tasks— people who want to spend more of their time focused on something mission-driven. . . . [I]t’s kind of low risk because at the end of the year, if it’s not for you, nothing lost . . . [and in the meantime,] hopefully the organization got some great work and valued added from the fellow, who can then walk away if they wish.”

By all accounts, Donna accomplished a lot for the organization: She added senior leadership at a critical time in this young organization’s history. She helped the organization realize its value, adding to the bottom line with increased fees. She identified and recruited the current Encore Fellow, who has been exemplary. She searched for and hired a new CFO, who, according to the Shepherd, has been a “game-changer” for the organization.

Donna said, “The EFN program is really extraordinary. It’s one of those enlightened ideas where both the organization and the fellow give a lot and get a lot. [My involvement] changed my life. I needed to do something I had never done before and I really needed to meet some new people and do some good; it really transformed me.”

After her Encore Fellowship, Donna realized a long-held dream and opened a bookstore. Shepherd said: “[Donna’s departure] wasn’t a failure [for either side]. In the course of the year, she figured out what she really wanted to do. And it turns out that she was able to find another Encore Fellow who . . . is a great fit for us. I think that is perhaps an unintended consequence but with a great benefit.”



## SUMMARY AND CONCLUSION

Each of the three fellows profiled came to their fellowship with years of business experience in the for-profit world. Each brought unique skills developed over a lifetime of work. Each sought a different life, with a greater sense of mission and wished to contribute to their communities. As one fellow said, “It sounds cliché, but I felt it was time to ‘give back.’” Each fellow had to learn the ropes of a new business.

In each instance, the organizations worked to welcome the fellows and give them leeway to make their contributions. First, the program operator, using the Encore.org matching platform, worked to find a good match. For the host organization, this meant very clearly identifying the work and their expectations. Each of the fellows exceeded these expectations, but they knew from the outset what the work would entail. Next, the leaders of each of these organizations gave the fellows broad access to information, team meetings and leadership at all levels of the organization to facilitate their learning the basics of the operation, the lingo (the acronyms!) and the pace of the work. Each leader spoke of being patient as fellows grappled with differences between the private sector and the nonprofit world. As one said, “I was used to being the boss with a huge support team; here, I had to get my own paper!”

Each spoke of the importance of listening and learning together, of meeting each other halfway. Each organization had to be open to doing things in a new and different way, to be receptive to the voices of the fellows. They all said that the onboarding process took about 90 days; a relatively brief time, to learn an entirely new business.

Each of the organizational leaders gradually opened to the new ideas brought to them by the fellows. Fellows were all competent at making a case for how they planned to tackle their assignments. Trusting fellows to carry out the work with little hand-holding was one of the hallmarks of success. Broadly, all of these fellows in one way or another applied the following skills developed during their work careers to their nonprofit assignments:

- **Project management skills:** The ability to organize and properly scope a project, maintain focus, follow-through on goals and metrics, solve problems and be a reliable presence in the organization.
- **People skills:** The ability to organize networks and groups, patience with process and building support for their project, listening and negotiation skills, and a generally high level of emotional maturity.
- **Flexibility:** The willingness to take on new roles and responsibilities and to be flexible in developing their own time commitments within the needs of the organization.
- **Motivation:** Their interest and engagement with the needs of their community and their commitment to the mission of the organizations they served.
- **Initiative:** The ability to work with minimal supervision, to find creative and self-directed ways to contribute and the eagerness to exceed expectations.
- **Openness to learning:** The ability to adjust to a new culture, business and working with fewer resources and support, and excitement about new skills they developed along the way.

In the end, these Encore Fellows left a lasting, positive mark on the organizations they served. Among other benefits of their work:

- MSF gained an Encore Consultants Program.
- SFA gained an expanded STEM Network, including a 10-fold increase in business partners.
- GCF increased its sustainability through increases in fee-for-service and bringing in more encore talent in leadership positions.

The fellows also experienced personal learning and growth. One continues to work on special projects; two have transitioned to 'second act' careers. All three continue to embrace and support the cause of the organization they served.

These fellows are typical of many experienced individuals who are willing and able to make similar contributions to sorely needed social-purpose projects. Encore.org founder Marc Freedman has suggested that the "encore" years represent an "extraordinary coming together of experience, perspective, motivation, capacity, and the time to do something with it all . . . or a time when many have insights about what matters, a special impetus to act on this wisdom, and the ability to do so." Freedman and colleagues urge the best-educated cohort in history to get involved in civic activities, support for nonprofits, and other activities to benefit society, even as they urge existing social-purpose organizations to harness the unique skills and talents of encore talent.

As more nonprofit organizations become aware of the potential impact that Encore Fellows and other mature, experienced workers can deliver to the nonprofit social service sector, encore opportunities to serve will rise to meet the availability of encore talent, looking for a chance to give back.

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**The Center on Aging & Work at Boston College** seeks to make longer lives better lives. We promote quality and choice of paid and unpaid work across the lifespan, with a particular focus on older adults. Through research studies, collaborations with business leaders, and engagement with an interdisciplinary network of scholars and practitioners, we bridge the worlds of research and practice.

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## Appendix: Methodology

A Boston College research team worked with an Encore.org liaison team to identify “highly successful” Fellow-nonprofit partnerships.

The Encore.org liaison team reached out to program operators to request nominations for highly successful Fellow-organization partnerships. Program operators were contacted and invited to nominate exemplar Fellows, defined as “those whose work produced a sustained positive impact, i.e. whose work was transformative for the organization and its constituents.” In order to be considered, Fellows had to have worked at organizations that:

- Served children or youth, directly or indirectly;
- Had at least 10 employees, to assure sufficient resources to participate and
- Could provide a knowledgeable representative to discuss the Fellow’s work and impact.

Thus, the research team used the exemplar methodology, i.e. a sample selection technique that involves the intentional selection of individuals, groups, or entities that exemplify the construct of interest in a highly developed manner (Brank, 2012, p. 1). The BC team worked with a committee at Encore.org to identify a list of 10-20 Fellows deemed to have brought significant, sustained organizational and cultural impact to their host organizations (exemplars of success). The purpose of this report is to present common factors in this level of success among 3 of these exemplars who agreed to participate.

Using this process, eight regional program operators working in the Encore Fellowships Network nominated 15 Fellows whom they had matched in the past two years with host organizations. The BC team and the liaison team met to rank the nominees thus narrowing the list to 3 Fellow-organization partnerships and one alternate. Nominees were then contacted by the liaison team to further inform them about the study and make the connection with the BC team. Since all three organizations that were invited to participate agreed to do so, the alternate was not contacted.

Members of the BC team then invited the organizational leader, the Fellow him- or herself, and at least one colleague or key stakeholder to share their experiences of the partnership. (In the case of one Fellow-organization partnership, Green City Force, we decided to include a description of how the selected Fellow interacted with two additional Encore Fellows in strengthening the organization’s capacity to carry out its mission.)

In addition to the Fellows, interviewees included:

Metropolitan Family Service: Matt Bartolotti, Chief Strategy Officer/Deputy CEO and Judy Strand, CEO

Science Foundation Arizona: John Kreikard, then Director of Education (no longer at SFAz); Linda Coyle, then Manager of Educational Program Development who became Director of Education when John left.

Green City Force: Lisbeth Shepherd, Executive Director; Carol Heller, Encore Fellow; Ann Short, Director of Finance

With consent, 10 structured telephone interviews (30-45 minutes) were conducted during the months of May and June, 2015. The conversations were audiotaped, transcribed and coded for unifying themes. Interview questions (below) were open-ended and followed an interview guide with probes for examples, meanings, and other clarifications.

## Interview Guide for Case Study

### Questions for Supervisor, Close Associate and Fellow

- 1) First, please tell me a little bit about your organization—what does it do?
- 2) For hosts/colleagues: What was the role of the Encore fellow? For fellows: What was your role?
- 3) For hosts/colleagues only: Please tell me a little bit about this organization/fellow partnership—what made it so successful from your perspective? Probes:
  - a. Was he/she your only choice or did you select from a number of applicants?
    - i. If choice among several, what about the candidate led to your choice?
    - ii. Did the candidate you selected seem to embody more of the characteristics you were looking for from someone at this life stage more than other candidates?
- 4) From your perspective, what motivated (you) your fellow to perform above and beyond? Probes:
  - a. Path to employment?
  - b. The desire to leave a legacy, help the next generation (generativity)?
  - c. The sheer pleasure of the work, engagement with it?
  - d. Belief in the cause? Identified with the cause?
    - i. Volunteer history—worked in this area of social purpose work before?
  - e. Searching for “what’s next”?
  - f. Need for structure\self-esteem\identity\social interaction in face of retirement?
  - g. Lack of other options?
- 5) What did the organization do to make it work—
  - i. What kind of “onboarding” did you (they) do?
  - ii. How did you (they) help the fellow (you) get oriented to the organization;
  - iii. What kind of support did you (they) provide?
- 6) For host and colleagues only: From your perspective—What did the fellow (you) do to make it so successful? Probes:
  - a. Did he/she start out strong and get better? Or was there some other pattern?
  - b. What were the fellow’s (your) greatest strengths?
  - c. What challenged him/her (you) the most?
  - d. How important is the (your) life stage of the fellow to his/her (your) success?
  - e. Were there any roles that (you) the fellow took on that reflected changes after coming on board? If so, why were these changes made?
  - f. Were there any unanticipated results of the fellowship? To what do you attribute these?
- 7) [For hosts/colleagues only] What has been the impact of this (your) fellow’s work on your (the organization’s) capacity to deliver your services to children and youth?
  - a. What has happened to this impact since the fellow completed the 12-month term?
  - b. Is the fellow still involved? Volunteering? Hired as a regular staff member?
  - c. Is there evidence of the impact of this fellow’s work on your constituents? Is that continuing?
  - d. Have you applied to have other encore fellows work within your organization? What has been the result?
  - e. Have you hired any other individuals at this life stage as a result of the fellowship experience?
  - f. Have you changed your recruitment processes or any HR policies to encourage more people from this life stage to become part of your talent pool?