



## **An Encore of Service: Experienced Americans Helping Vulnerable Youth**

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*by Shirley Sagawa and John Bridgeland*

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## FOREWORD

At the turn of the last century, William James – at 64, a visiting professor at Stanford University – delivered an historic address, urging young people to engage in service to the larger world. James’ “The Moral Equivalent of War,” widely considered the origin of the U.S. national service movement, was less an invocation of lofty ideals than a plan to knock some sense into the nation’s youth, a wake-up call to life’s realities.

In 2012, retired General Stanley McChrystal offered a far more uplifting appeal for universal service at the Aspen Ideas Festival, when he proposed national service as a rite of passage for all young people. Then 57, he joked that service should be for everyone 56 and younger.

We heartily endorse the clarion call to service by young people, but isn’t it time – with the converging demographic and longevity revolutions – for those of us in the second half of adulthood to take this call to action to heart. Shouldn’t we heed our own advice and ally with practical idealists of all generations to build a stronger future, and leave the world better than we found it?

In this report, authors John Bridgeland and Shirley Sagawa urge those over 50 to answer the call to service. And they exhort our nation to meet these experienced individuals halfway, making this commitment a real and practical possibility for large numbers of older people drawn to this path.

Bridgeland and Sagawa are deeply engaged in bringing to life General McChrystal’s call for youth service through the Service Year Alliance, giving everyone from 18 to 28 the opportunity to contribute in this way. Here, they extend the invitation and imperative to serve to those in the ‘encore’ stage of life, arguing that engaging the energy and experience of this group can help solve significant societal challenges, most especially through improving the prospects of vulnerable children and youth.

We endorse this broad vision as well as their recommendation for an encore year of service that parallels the expectations the national service movement has set for young people. We’re all the more enthusiastic about this agenda because encore service is so often a gateway to a multi-year commitment comprising a new stage of work focused on civic engagement and social purpose.

Expanding the call to service beyond our nation’s youth will provide a compelling opportunity for millions of Americans moving into their 50s, 60s, 70s and beyond. Indeed, as 11,000 Americans a day celebrate their 65th birthdays, and the first Gen Xers cross into their 50s, embracing the desire to serve could transform the age wave into an experience dividend.

What’s more, starting with today’s cohorts moving through these decades of life doesn’t mean ending there. Indeed, these first efforts can shape a new tradition that sets expectations for those generations coming on our heels, expectations for a lifetime of commitment and contribution that is both personally meaningful and means something beyond themselves.

Service with this emphasis reinforces and capitalizes on the natural cycle of life – that rising impulse in midlife to invest in the well-being of young people. Erik Erikson called this desire *generativity*, and argued that the hallmark of successful adult human development could be encapsulated in the phrase, “I am what survives of me.” Yet for the past half-century, American society has often done much to thwart that behavior, consigning older people to age-segregated environments and stifling the instinct to connect with and develop young people.

By encouraging and establishing encore service by experienced adults on behalf of young people, we can help turn this trend around, replacing the outdated ‘graying as playing’ ethos with one that runs *with* the grain of human nature – and aligns with 21<sup>st</sup> century realities and opportunities: An era when developed societies across the globe will include increasingly larger numbers of older people, and relatively fewer children and youth, all the more precious as a result.

In so doing, we can provide a windfall of support for young people and create sustainable societies that make the most of the great gift of longer lives.

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# **An Encore of Service: Experienced Americans Helping Vulnerable Youth**

## **EXECUTIVE SUMMARY**

*An Encore of Service* makes the case that millions of our nation's most vulnerable children stand to benefit from a vast, untapped resource: The fast-rising population of Americans age 50+, whose longevity, vitality, expertise and knowledge represent a robust (and replenishing) natural resource. Our call to action outlines a nationwide initiative that will marshal the talents of millions in Encore Service to boost the prospects of vulnerable children and youth.

The value of service for older adults has long been recognized. But the present opportunity is unique in history: Never before has the country had a comparably powerful human resource, poised to contribute, and never before has the need been so great, with millions of vulnerable youth at risk of not reaching productive adulthood. The policy and practice agenda set forth in these pages can begin to transform the longevity revolution into a social revolution, benefiting Americans of every generation, today and for generations to come.

### **ENCORE SERVICE: A Definition**

Encore Service is national service in the second half of adulthood – the “encore” years – when people who are 50+ serve for a continuous period of time (six months or more) to address a public problem, sometimes receiving stipends or other benefits. We distinguish Encore Service from episodic or shorter-term volunteering and from full- and part-time employment. We also distinguish it from many other important ways that the generations support one another, such as informal caring relationships inside and across families and communities. Encore Service connects encore-stage adults in direct-service and capacity-building projects and programs.

### **THE WAY FORWARD: Making the Vision Real**

At the heart of Encore Service for Youth is the goal of channeling millions of older Americans into service programs for a sustained length of time. To that end, we outline a policy and practice agenda that can spark and promote the best ideas, leading to high-impact Encore Service programs to improve the lives of children and youth. What follows is a brief overview.

### **Introduce an Encore Service Year**

An Encore Service Year should be supported through public and private efforts, creating a purpose-focused corps of experienced adults dedicated to enhancing the life prospects of vulnerable children and youth. This force would deploy its accumulated experience to improve, among other things, early

childhood education, child literacy and the transition of students from high school to either work or higher education. This year can also serve as a transition to an encore career – as it does now for many in Encore.org’s Encore Fellowships Network®, working with a national network of corporations and nonprofits.

This ambitious initiative will require both creative ideas and support. Among our proposals:

**Fully Fund the Serve America Act:** The Edward M. Kennedy Serve America Act, passed in 2009 but never fully funded, would expand AmeriCorps from 75,000 to 250,000 positions by 2017 and explicitly targets 10 percent of all positions for people age 55+. In addition, the Act expands age and income eligibility for the Foster Grandparent program; creates the Silver Scholarships program, through which people 55+ can earn a \$1,000 education award transferable to a child or grandchild and establishes Serve America Fellowships and Encore Fellowships.

**Create Innovative Self-Funding Vehicles:** Promising possibilities include a new tax-advantaged savings vehicle, perhaps modeled on 529 college-saving plans, and actuarially-neutral, phased Social Security that would permit individuals to start and stop payments to fund service work.

**Develop an Encore Service Year Exchange:** The online Service Year Exchange facilitates development of service positions for young adults and helps connect programs and participants. A similar exchange for Encore Service would accelerate the expansion of such positions and help encore-stage adults identify opportunities to serve.

**Expand the Participation of 50+ Adults in Existing Public Service Programs:** The Peace Corps provides federally funded international service options for older Americans, but there is great room for growth, as only 7 to 11 percent of current participants are over 50. An “Encore in the Peace Corps” program would allocate funding to grow the Peace Corps to at least 10,000 positions each year, 20 percent of which would be 50+.

**Create Encore-Stage White House Fellowships:** Founded in 1964, the prestigious White House Fellowships offer exceptional young men and women first-hand experience working at the highest levels of the federal government. We propose creating a similar program for experienced Americans, with a focus on youth-serving initiatives.

**Redesign the Senior Community Service Employment Program:** This federally funded community service and work-based training program should be transferred from the U.S. Department of Labor to the Corporation for National and Community Service, and redesigned to support innovative strategies to help low-income adults gain experience helping vulnerable youth that will bridge transitions to encore careers.

**Harness Intergenerational Power:** Programs where older and younger adults or youth serve together benefit all generations. More such efforts will counter increasing isolation and historically low levels of social trust. One possibility: Establishing an intergenerational service corps, where youth and older adults work side by side in pursuit of shared goals.

**Make Encore-Stage Service Easier:** Proposed policy changes include raising the charitable mileage deduction, streamlining background checks, facilitating transportation, addressing other logistical challenges and providing financial incentives to motivate and reward service.

**Leverage Existing Funds for Maximum Impact.** In 2014, the federal government spent \$354 billion on children through programs across numerous agencies.<sup>1</sup> In many cases, use of these dollars is narrowly restricted, making it harder to leverage them for maximum impact. By making these funding streams more flexible and incentivizing the incorporation of Encore Service, the federal government would increase the likelihood of impressive outcomes.

Additionally, the President could consider an executive order instructing departments and agencies to identify existing federal programs serving youth that could use Encore Service members.

### **Accountability, not Anecdotes**

In the 21<sup>st</sup> century, investments are premised on data-based evidence of impact. We accept and welcome the use of quantitative data to identify top Encore Service ideas and innovations.

Increased focus on data and evaluation must go hand-in-hand with expanding Encore Service. In particular, the Corporation for National and Community Service should expand evaluation funding for both Senior Corps programs and Encore Service programs not presently funded by the Corporation.

We also propose national recognition to reward excellence, expressed in an Encore Service Prize, to recognize high performance and share good ideas.

### **CONCLUSION**

The Encore Service for Youth initiative would tap the talents of experienced Americans who want to leave the world better than they found it by helping vulnerable youth climb the ladders of opportunity – today, and for generations to come.

Our times cry out for such a large-scale effort to foster the spirit, and create the reality, of one nation committed to the young people who are our collective future.

## WHAT WE KNOW: The Rationale for Encore Service

### 1. A win:win scenario: Vulnerable children and youth benefit from relationships with older adults, who in turn, benefit from relationships with younger people.

Emerging research shows that encore-stage adults are well-suited to work with children, particularly youth who have experienced stress or trauma. Experienced adults bring a lifetime of skills, empathy and experience that equips them to deliver direct services such as tutoring, mentoring and coaching, and family support, as well as expertise in areas that build capacity, such as fundraising, volunteer management, technology, and communications.

Encore-stage adults are ready, willing and eager to improve the lives of vulnerable children and youth. In turn, they also derive benefits: Extensive research links service with improved life satisfaction, health and longevity. Most encore-stage adults consider helping people in need more important than a personal desire to stay healthy and active – but service work offers both, and also opens pathways to encore careers, of interest to the millions of 50+ workers contemplating alternatives to retirement.

### 2. Quantitative evidence – hard data – show that Encore Service programs significantly enhance the skills and life prospects of vulnerable children and youth. Consider:

**Tutoring:** Experience Corps, which mobilizes older Americans as literacy tutors, has been linked to improvements in reading, behavior and teacher satisfaction.

**Mentoring:** Across Ages, a mentoring program developed by Temple University's Intergenerational Center, showed statistically significant positive outcomes of intergenerational tutoring on a variety of measures. Along similar lines, a New York City truancy prevention initiative that assigned ReServists as Success Mentors to at-risk middle school students showed increased in school-wide attendance rates over other city middle schools.

**Enhancing school readiness and success:** Jumpstart mobilizes both college- and encore-stage talent to work with preschool-age children, leading to significant gains in reading, school behavior and social and emotional skills.

**Enhancing college prep:** The READY program engages ReServists, stipended workers age 55+, to help over-burdened college counselors in high-need urban high schools.

**Caring for children with special needs:** The National Council of Aging's Family Friends program significantly decreased the need for hospitalization of children with special needs – and significantly increased caregivers' mental and physical health.

**Building capacity:** Programs shown to significantly expand the capacity of youth-serving organizations to provide services include Encore Fellowships, which provide stipends to skilled experienced professionals in high-impact roles with social-purpose organizations.



### **3. Successful youth-related Encore Service opportunities substantially benefit kids, via direct service or capacity-building, while respecting the lifestyle needs of encore-stage adults.**

Successful Encore Service programs understand the value of long-term engagement and retention – both to children and adults – and they offer encore-stage adults the opportunity to make a real difference. The best approach to engage experienced adults is to offer part-time, intensive opportunities that include social opportunities with like-minded peers, flexibility and autonomy, within the organization’s mission.

### **4. Encore Service programs can narrow the opportunity gap and help to create a more just and equitable society.**

A disturbing and increasing “opportunity gap” divides children of “have” and “have not” backgrounds, with far too many children missing the daily developmental supports that children of high-income parents routinely experience.

These are the sort of human hurdles that experienced Americans are demonstrably able to help young people surmount through guidance, support, tutoring and mentorship, among other activities. Moreover, at a time when the generations risk increasing isolation, most people in the United States see the need for more intergenerational interaction, and want their policymakers to facilitate these powerful connections.



## An Encore of Service: Experienced Americans Helping Vulnerable Youth

*"It's not enough for a great nation merely to have added new years to life – our objective must also be to add new life to those years."* – President John F. Kennedy, 1963.

### INTRODUCTION

Millions of Americans are living longer and are eager to give back to their country in their later years. Millions of vulnerable youth in low-income families are, for the first time in history, unlikely to do better than their parents. These two historic dynamics in American life can and should converge in a national effort to engage experienced Americans in “encore” service to help vulnerable youth. Such an effort could transform our country for generations, by boosting opportunities for younger and older Americans alike.

#### The Opportunity

America, like many other developed nations, is in the midst of an unprecedented demographic shift. Since the beginning of recorded history, of all the people who have *ever lived to the age of 65, two-thirds are alive today.*<sup>4</sup> Americans over 50 dominate the landscape in the United States by their sheer numbers alone: There are 109 million Americans in this age group, including 76 million Baby Boomers born between 1946 and 1964, compared with “only” 49 million Gen Xers and 82 million Millennials.<sup>5</sup> These experienced adults are healthier, better educated, more highly skilled, more active and more likely to have decades of robust health and energy after leaving their midlife work than any previous generation. How our country defines the role of post-midlife Americans – by further marshaling their abilities or by encouraging passive purposelessness – reflects our country's values and will shape its

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future. We know that active, engaged 50+ Americans who give back to their communities improve their life satisfaction, health and longevity. But there is another central reason to tap their talents: There is a great need that experienced Americans are uniquely poised to fill. Experienced adults represent a resource our nation needs – at a time of acute challenge for our country's young people.

Consider one of the central issues facing us today, which undermines America's creed of equality of opportunity: For the first time, children in lower-income families are no longer likely to climb higher on the socioeconomic ladder than their parents.<sup>6</sup> The churn of economic and social mobility has slowed, threatening our core belief that all children, regardless of their circumstances, have an equal chance for a good education, a college degree and a family-sustaining job. We have the ability, with the support of encore-stage adults, to boost such opportunities for all children.

The authors of a landmark study published by the National Academy of Sciences stated, "Virtually every aspect of early human development, from the brain's evolving activity to the child's capacity for empathy, is affected by the environments and experiences that are encountered in a cumulative fashion, beginning in the prenatal period and extending throughout the early childhood years."<sup>7</sup> As Robert Putnam catalogs in his groundbreaking book, "Our Kids: The American Dream In Crisis," however, children of lower-income parents have much less face time, reading time, verbal encouragements, family dinners, enrichment activities and other everyday developmental supports than do children of higher-income parents.

Imagine for a moment that every parent in need had a trained, caring advisor who would coach them in how to support the healthy development of their infants and young children. Imagine that every vulnerable child had a mentor, a tutor, a coach and a personal

### ***Two Encores of Service***

Deeply depressed following the death of her son, Carleaner McKinney found herself at age 73 getting out of bed at noon, eating and watching television in an unhealthy, unproductive cycle. Her daughter-in-law, who worked for a preschool, urged her to volunteer with the Jumpstart Foster Grandparent program. After persistent pushing, McKinney decided to put her experience as a mother of four and grandmother of 23 to work four days a week, helping low-income preschoolers get ready for kindergarten. Of the 182 children she and her fellow corps members mentored for a year, 96 percent showed gains in language and literacy skills and more than half gained skills on one or more developmental levels. Not only did the program help the children, it gave McKinney "a reason to get up in the morning." In addition, her Encore Service provided McKinney, a survivor of a heart attack and stroke, the opportunity to do something physical -- keeping up with the active preschoolers she mentored. As a result, she went from using a walker, to a cane, to walking without assistance.<sup>2</sup>

Throughout his 26-year career as an Intel programmer, Jim McNerney had a passion for music. Retirement gave him the opportunity to blend his passion and skills at the Phoenix Conservatory of Music (PCM), as an Experience Matters Encore Fellow. PCM had talented young musicians who needed recording space but lacked the budget and technology to make that a reality. At PCM, Jim put together donated equipment, a lifetime's worth of know-how and – with the help of an intern – created three new recording units. Students can now make the recordings they need for college applications, and can record and sell their own music, with a small share of the revenue coming back to the school. Some earn enough to pay for their own post-secondary training. And PCM has a new student – Jim, who now studies piano at PCM, fulfilling a lifelong dream.<sup>3</sup>

college advisor. Imagine that every family working to help their children climb the ladder of opportunity had a guide to local services and a family financial advisor. Evidence shows that such efforts can boost the health, education and economic opportunity of children in need.<sup>8</sup>

Then imagine that just one tenth of the more than 100 million Americans over 50 – 10 million people, each with a lifetime of experience – were willing to step up into these and other roles.<sup>9</sup> Through such service, experienced Americans could have a measurable impact on improving the lives of the approximately 15 million children at risk of not reaching productive adulthood,<sup>10</sup> while improving their own health and well-being.

This paper imagines just that. It defines what we call “Encore Service” and makes the case for why America needs such service, now and in the future. It examines the history and proof points of Encore Service. It shares powerful examples of service already in place around the country and what we can learn from these programs. It then examines data that can help us assess the opportunity presented by older adults to address the needs of today’s youth and their families. And finally, it offers a policy agenda to update Encore Service over the next decade, and spark a national dialogue among U.S. presidential candidates, governors, mayors and leaders of nonprofits, businesses, foundations and communities that together, could move a nation.

### **What is Encore Service?**

Encore Service is national service in the second half of adulthood – colloquially, an encore role or career – whereby an older American serves for a continuous period of time (six months or more) to address a public problem, sometimes receiving a stipend or other benefits. We distinguish Encore Service from traditional, episodic volunteering and from full-time or part-time employment. We also distinguish it from many other important ways that the generations can support one another, such as advocacy, fundraising for causes, and informal caring relationships inside and across families and communities.<sup>11</sup> Encore Service connects encore-stage adults in direct-service and capacity-building projects and programs.

### **Why Now?**

Americans desire but lack opportunities for shared experiences across diverse backgrounds and ages that remind us of our common heritage of personal freedom and the responsibility to help one another. Generations are increasingly isolated,<sup>12</sup> and communities across America are fraying. Trust in one another, and in key institutions, are at their lowest levels in generations.<sup>13</sup> Many of the other indicators of our civic health are also at equally low levels.<sup>14</sup>

We see the effects of this broken citizenship all around us – in places of tragedy such as Ferguson, Baltimore, and Charleston; in cities and towns where children of low- and middle-income families no longer do better than their parents; and in our statehouses and Congress, where not knowing one

another leads to division and paralysis. Some even threaten a growing battle between older and younger generations over budget entitlements, given the current projection that Social Security will only be able to pay 77 percent of benefits as Boomers reach retirement age<sup>15</sup> and as the financial burden to fund such programs falls on younger, working Americans. There is much to divide us; we need more opportunities to reunite us, as people, communities and a nation. Americans in local communities are going to have to step forward, as generations have done in the past, to renew our sense of common purpose, to work together to get things done – and to restore trust in each other and the institutions that move America forward.

### ***Encore Adults Are Ready***

Encore-stage adults are worried about the future and are ready for a call to action. A nationally representative survey of Americans ages 44 to 79 showed that 55 percent of adults believe that they will leave the world in worse condition than they inherited it.<sup>16</sup> Encouragingly, those already engaged in service feel less pessimistic. The survey also showed that more Americans rank “helping people in need” above “staying healthy and active,” although many of course see the benefits of both.<sup>17</sup> In addition, according to a 2010 study conducted by Harris Interactive for Generations United, a large majority (78 percent) of people in the U.S. want their policymakers to facilitate and promote intergenerational interaction.<sup>18</sup>

Of all of the service activities in which experienced Americans might engage, the most attractive is to mentor and tutor young people.<sup>19</sup> Anthropologist Margaret Mead recognized the importance of this link when she wrote, “Somehow we have to get older people back close to growing children if we are to restore a sense of community.” Thought leaders have echoed this call to service across the decades, from Richard Danzig’s seminal study on national service in the 1980s,<sup>20</sup> to the Milken Institute’s work to redefine aging in the 21<sup>st</sup> century.<sup>21</sup>

### ***Encore Service Helps Youth***

While 50+ adults have much to offer in response to a wide range of challenges facing America today, life experience confers special benefits for children and youth. Across life’s developmental stages, from infancy to young adulthood, young people need caring, guidance, tutoring and coaching beyond what their parents may be able to offer. Experienced adults are well-suited to provide this kind of assistance. In fact, emerging research suggests that emotional stability improves over a lifespan, which may mean that 50+ adults are particularly well-suited to work with children, particularly those who have experienced stress or trauma.<sup>22</sup>

In “Our Kids,” Robert Putnam describes a disturbing opportunity gap between children from “have” and “have-not” backgrounds. Among the solutions he prescribes, based on evidence of effectiveness, is to focus national service programs “massively on mentoring for poor kids . . . as a sign of real national commitment to narrow the opportunity gap.”<sup>23</sup> In chapter after chapter, he highlights the need for more caring, loving adults in the lives of vulnerable children. We focus here on what encore-stage adults can do to help – and share the evidence that service strategies work.

### ***What Adults Can Do To Help***

Experienced adults have a lifetime of education, skills and often, parenting experience that could, for example, provide:

- **Guidance to young parents** to advance the health and development of their children;
- **One-on-one attention** to children in early childhood programs;
- **Respite care** for families with children or family members with disabilities;
- **Classroom support**, to maintain a positive learning environment;
- **Tutoring** to students who need extra help;
- **Mentoring** for students who have social, emotional and academic challenges;
- **Coaching** to develop conflict resolution skills;
- **Translation assistance** to help families with limited English proficiency navigate systems on behalf of their children;
- **Non-academic enrichments in community settings**, like libraries, recreation centers, and afterschool programs, to inspire young people to develop new interests and learn life skills (such as cooking, personal financial management or business skills) that will promote their independence;
- **Coaching sports**, to provide athletic opportunities to children;
- **College-advising**, to help young people and their families plan for and apply to college;
- **Career coaching**, to help young people discover possible careers and understand how their academic experiences relate to successful futures;
- **Support to young adults** transitioning out of foster care and homeless youth; and
- **Job and interview coaching**, to help young adults succeed in the workplace.

All of these roles require training – and they all take advantage of the wisdom and experience experienced adults can offer as parents, extended family, in the workplace, and as informal coaches in a variety of settings. A 2015 report by Americas Promise concluded that “national service can be a game-changing resource for closing the graduation and opportunity gap for America’s young people.” That study additionally determined that caring adults – including adults 50+ who serve as volunteer mentors and tutors – make the critical difference in the lives of millions of children and youth, supporting their education, growth and eventual success.<sup>24</sup>

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***Caring adults . . . make  
the critical difference in  
the lives of millions of  
children and youth.***

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In addition to working one-on-one, many encore-stage adults possess significant skills that could help build the capacity of organizations that play important roles in advancing youth and family success. Such skills could include helping organizations:

- Write grant proposals,
- Maintain facilities,
- Develop business processes,
- Manage or market their programs,
- Analyze data,
- Recruit and supervise volunteers,
- Better use technology,
- Organize events and
- Mentor less-experienced staff.

Intergenerational program designs in which older and younger adults or youth serve together intentionally benefit all generations by linking them. For example, youth and older adults might serve side-by-side in an intergenerational service corps, each contributing their unique assets. Dual mentoring programs enable young people to teach adults specific skills (such as new technologies), while learning different skills (such as writing) from their older partners. Generations United has identified a wide range of societal benefits to intergenerational programs. For example, interacting with 50+ adults enables youth to develop social networks, communication skills, problem-solving abilities and positive attitudes towards aging, while 50+ adults learn to adapt and experience lower levels of isolation through interacting with youth.<sup>25</sup>

### **Accountability and Encore Service**

A national movement has emerged to use data and evidence to guide investments in what works – to sharpen the impact of programs, practices and policies. A handful of Encore Service programs, including tutoring and mentoring programs, have been carefully evaluated and have shown significant results in boosting outcomes for youth. (Other programs have demonstrated positive results but have not specifically evaluated service delivered by encore-stage volunteers.)

When the nation works to mobilize experienced Americans to help vulnerable youth, policymakers and other stakeholders should support increased investment in evaluation and direct resources to efforts that work, while innovating and experimenting with other approaches to learn more about what is effective over time.

Following are some examples of evidence-based efforts that could become Encore Service focus areas:

## ***Tutoring***

AARP Experience Corps mobilizes older Americans as literacy tutors for children in disadvantaged schools. Washington University of St. Louis/Mathematica Policy Research used a randomized, experimental design to measure outcomes of more than 800 first-, second- and third-grade students at 23 urban schools who were tutored through Experience Corps in three cities. They found:

**Improved literacy skills:** 60 percent of tutored children had greater gains in two critical literacy skills (sounding out new words and reading comprehension)

**Accelerated progress:** Students with Experience Corps tutors got a boost in reading skills equivalent to the anticipated gain from being assigned to a classroom with 40 percent fewer children.<sup>26</sup>

Johns Hopkins University used a quasi-experimental design to measure outcomes of 1,194 children in grades K–3 at six urban elementary schools with Experience Corps tutors and found:

**Better test scores:** Third-graders scored significantly higher on a reading test, the Maryland School Performance Assessment Program, than children in the control schools;

**Better behavior:** In schools with Experience Corps tutors, referrals to the principal for classroom misbehavior decreased by half, even as referrals in other schools remained about the same; and

**Teacher approval:** Teachers and principals reported high satisfaction with Experience Corps tutors.<sup>27</sup>

## ***Mentoring***

A substantial number of studies validate the impact of both formal and informal mentoring on youth. One multidimensional model, Across Ages, developed by Temple University's Intergenerational Center, combines youth community service with mentoring by experienced adults who help children develop the awareness, self-confidence and skills they need to resist drugs and overcome overwhelming obstacles. An initial evaluation, utilizing a randomized control-group design, found that mentored youth showed statistically significant positive outcomes on multiple measures, including attitudes toward school and the future, attitudes toward adults, self-perception and knowledge about older people. They also showed improved school attendance and fewer school suspensions, compared to control group youth. Qualitatively, the more mentoring a student received, the greater the positive effects. Replications of the program also found statistically significant gains on these outcome measures for mentored youth.<sup>28</sup>

## ***Early Childhood***

Jumpstart, a national program that mobilizes both young adults and encore-stage Americans to serve young children in low-income neighborhoods, was evaluated in a randomized controlled trial by Illinois State University. The study evaluated the impact of Jumpstart's college-age corps program in 2011, showing significant gains in reading, school behavior and social and emotional skills compared to the control group.<sup>29</sup> The program has since been adapted to engage encore-stage adults as members of the corps in neighborhoods where it has been difficult to recruit college students. Extensive research shows



that HIPPY (Home Instruction for Parents of Preschool Youngsters), a home-based preschool education program deploying AmeriCorps members to help parents acquire new knowledge, confidence and skills to help their children learn, offers many positive benefits for children and families, including improved school readiness, enhanced parent involvement, and higher academic achievement for children in reading, math and social studies in third, fifth and sixth grades. A stunning 96 percent of parents who participated in HIPPY reported spending more time reading to their children.<sup>30</sup> HIPPY AmeriCorps members are members of the community served and are diverse in age, including parents who have themselves been helped by the program.

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***The more mentoring a student received, the greater the positive effect.***

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### ***School-Age Youth***

In addition to tutoring and mentoring, national service corps members and volunteers play a variety of roles assisting school-age youth. For example, former New York City Mayor Michael Bloomberg's Interagency Task Force on Truancy and Chronic Absenteeism and ReServe collaborated on an interagency truancy prevention initiative. Teams of ReServists – adult professionals over the age of 55 – were trained as Success Mentors and assigned to New York City middle schools with large numbers of students whose chronic absenteeism combined with behavior and academic problems put them at risk of dropping out. Working with an average of 15 to 20 students each, the Success Mentors greeted students in the morning and called their homes if they were absent, created lunchtime study sessions, organized peer mentoring and peer tutoring initiatives, identified online tutoring resources, made “good news” calls to parents and solicited corporate donations as rewards for good attendance. After just a semester, the two schools where ReServists were placed showed the greatest increases in school-wide attendance across New York City's middle schools.

Other examples of service programs serving school-aged youth include Playworks and Citizen Schools. Randomized controlled trials of Playworks, which engages full-time service year coaches to lead recess activities and physical play through the day and after school, show widespread benefits, including less bullying, more physical activity and more time for teaching.<sup>31</sup> While the typical Playworks coach is a young adult, the program also trains adults of all ages in its methods. Citizen Schools engages community volunteers, including adults 50+, to teach semester-long “apprenticeships” after regular school hours, based on the volunteer's own skills and expertise. A rigorous longitudinal study of its Boston program from 2001 to 2010 found that at-risk students enrolled in Citizen Schools's afterschool apprenticeship program showed increased engagement in school achievement and graduation.<sup>32</sup>

### ***College Access and Success***

A four-year college degree remains the surest path out of poverty. However, upper-income students (who are more likely to have help from college-educated adults in preparing for and applying to college) are ten times more likely to attend college than are children with fewer resources.<sup>33</sup> Intensive, tailored coaching significantly increases college enrollment for many economically challenged students. Increasingly, organizations engage service participants, including experienced adults, to coach students through the admission process and encourage them to persist to graduation.

For example, iMentor connects students and mentors to work one-on-one, in-person and online, to develop strong personal relationships, nurture college aspirations, navigate the college application process and build critical skills that lead to college success. In New York City, iMentor partners with public schools to ensure that every student in the schools receives a mentor. In 2013, 97 percent of iMentor high school seniors, most of whom were low-income, completed college applications, and 75 percent of iMentor's 2013 high school graduates enrolled in college, compared with only 50 percent of low-income students.<sup>34</sup> Four out of five iMentor students who entered college persisted into their second year, compared to the national average of two out of three first-generation college students.

READY, created with the support of local foundations, AmeriCorps and the New York City Department of Education, engages experienced adults as READY ReServists to help overburdened college counselors in high-need urban high schools. They meet with students and their families to familiarize them with their college options, organize college information workshops, help students research colleges and scholarships, coach them through the essay-writing and application process, assist them and their families in applying for financial aid and help them evaluate their financial aid offers. Serving 15 hours a week, READY ReServists are placed at approximately 50 high schools in all five boroughs of New York City as well as schools in Miami, Florida. A preliminary study of the READY ReServist program found that more than 90 percent of the counselors who supervised the AmeriCorps members believe they helped students plan for college. ReServists also freed up the counselors' time for other work.<sup>35</sup>

### ***Children with Disabilities***

Families of children with special needs often require a range of services to enhance health, well-being and quality of life, including respite care, which enables families to attend to their other children's needs or take a stress-relieving break from caregiving.<sup>36</sup> The Family Friends program, led by the National Council on Aging for many years, arranged for 50+ adults to provide weekly respite care for families with children with special needs. Volunteer-delivered respite care has proven successful in many situations, but is too rarely available.<sup>37</sup> Researchers have found that volunteer-provided respite care significantly decreased the need for hospitalization of children with special needs and significantly increased the mental and physical health of the primary caregivers.<sup>38</sup>

### ***Building the Capacity of Youth-Serving Organizations***

Nonprofit organizations, including those serving children and youth, often report limitations in their capacity in many arenas, including fundraising, volunteer management, technology, communications and other areas.<sup>39</sup> For five decades, VISTA has provided human capital in the form of service-year participants to help build the capacity of anti-poverty organizations. A longitudinal study of AmeriCorps, including AmeriCorps VISTA volunteers, found that members had a strong impact on organizational capacity. Most organizations in the study (93 percent) reported that members helped them to serve additional persons in the community, 84 percent reported that AmeriCorps and its members helped them to leverage additional volunteers, nearly all (88 percent) reported that the AmeriCorps program and members contributed to their organization's ability to develop additional partnerships with other organizations and 62 percent reported that the members helped to bring in donations of goods or services.<sup>40</sup>

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***Encore Service helps young people and improves the lives of encore-stage adults.***

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In recent years, specific initiatives have directed experienced professionals to provide intensive, sustained service to build the capacity of nonprofit organizations, including those serving vulnerable children. Encore Fellowships, a program of the national nonprofit Encore.org, provide stipends to skilled, experienced professionals placed with social-purpose organizations in high-impact assignments. Piloted in Silicon Valley, the program now engages a network of more than 250 fellows in 20 metropolitan areas. A pilot evaluation found that the program provided long-term value to social-purpose organizations when fellows were placed in significant, capacity-building assignments that used their specific skills and expertise.<sup>41</sup> New York City-based ReServe offers professionals age 55+ a variety of part-time, flexible assignments with a modest hourly stipend. The effort has expanded to additional East Coast and Midwest locations. Many ReServe postings relate to children and youth in schools and in the community.

### **Encore Service Boosts Health**

Encore Service helps young people and it improves the lives of encore-stage adults. As highlighted by the National Institutes of Health, national service programs can lead to significant improvements in physical activity and health. For example, a 2006 study of AARP Experience Corps suggested that program participants who previously reported “low activity” experienced an average 110 percent increase in their physical activity,<sup>42</sup> while another Experience Corps study found short-term gains in corps members’ executive function and brain activity.<sup>43</sup> A 2010 study showed that after two years, individuals serving in Experience Corps experienced fewer depressive symptoms and functional limitations than controls, while the similar-aged control group had increases in both categories.<sup>44</sup> Other studies of volunteers engaged in varied service activities also show higher quality of life, increased life satisfaction and self-esteem.<sup>45</sup> In March 2015, a groundbreaking randomized controlled trial conducted over a two-year period showed a correlation between participation in the Baltimore Experience Corps and reversed or halted declines in brain volume in regions vulnerable to dementia and Alzheimer’s disease in male participants.<sup>46</sup>

Previous research has shown that volunteers live longer lives, possibly due to reducing stress and isolation and maintaining a sense of purpose. A study of Americans

#### ***From Encore Service to Encore Careers***

Although Cherie Scott’s professional experience focused on managing and marketing senior housing, in 2011, Cherie decided it was time to find a fulfilling service opportunity that utilized her creative skills. Free Arts for Abused Children of Arizona offered her the chance to use art as an expressive tool to mentor abused and homeless children. For two years, Cherie gave her free time to Free Arts. When a staff opening became available, Cherie saw a clear alignment between her past professional skills and the Community Liaison and Volunteer Manager position at Free Arts. She was hired in 2013 to increase volunteer recruitment and community partnerships for Free Arts.<sup>50</sup>

After a career as a senior finance executive, Howard Zuckerman had accomplished most of his professional goals. When he retired and moved to be closer to two of his sons, Howard left an active life serving on nonprofit boards and a successful painting business. He wasn’t necessarily looking to work in a nonprofit when he learned about ReServe, and an open financial advisor position for a ReServist at a preK-grade 8 charter school. The school, in a period of transition, was struggling to find personnel to manage its bookkeeping and accounting requirements and overhaul its financial infrastructure. Howard, a seasoned MBA, was a quick study who helped to hire and train a new accountant/bookkeeper and part-time controller. As a ReServist, he worked with the school’s auditor to prepare financial statements, helped to select members of the board of director’s finance and investment committee, identified cost-saving opportunities in the school’s banking and investment relationships and carried out many other financial-related activities. Eventually, the school asked him to become its chief financial officer. Zuckerman currently works there part-time, for a stipend of \$10 per hour through ReServe.<sup>51</sup>

over age 60 found lower levels of disability and higher levels of well-being in volunteers. *Notably, volunteer status had a greater positive impact than other factors, including income, education level or marital status.*<sup>47</sup> Volunteering may be particularly helpful for older Americans undergoing life stress or for those who are at risk of social isolation. One study found that volunteers who had recently lost a spouse or another loved one experienced a shorter course of depression than those who did not volunteer.<sup>48</sup> As more Americans continue to live longer and health-care costs continue to mount, we believe that Encore Service on a massive scale would benefit encore-stage adults and a health-care system that is working to lower costs as it improves the quality of care.

### **Service as a Bridge to Encore Careers**

Service, particularly full-time, substantial service, provides a well-worn path for individuals to explore and launch new careers. Recent college graduates, in particular, often use a service year as a way to develop contacts, learn about a field, build skills and knowledge, and ultimately advance in public service careers, including teaching, health care, economic development and nonprofit management. Experienced adults can also use the service-year experience as a strategy to transition to an encore career in a new field. Early research on the paths of Encore Fellows validates this concept. A 2009 independent evaluation of the Silicon Valley Encore Fellowships pilot program confirmed that the fellowship supported experienced professionals who transitioned from private sector careers into high-impact, nonprofit roles. Through the fellowship experience, the 10 fellows developed a better understanding of nonprofit work culture and discovered how their corporate skills could be applied to nonprofit contexts. All but two of the nonprofits in the pilot offered fellows continuing paid work, and all 10 fellows chose to pursue encore careers in the social sector.<sup>49</sup>

National service programs have a strong track record of sending alumni into public service careers. A longitudinal study of AmeriCorps found that 60 percent of alumni were working in public service careers in either government or the nonprofit sector.<sup>52</sup> A 2014 poll of AmeriCorps alumni confirmed that 64 percent work in these sectors (compared with just six percent of college students who plan to work in public sector institutions).<sup>53</sup> In addition, the poll found that nearly all alums (88 percent) believe their AmeriCorps service was among their most significant professional experiences, providing valuable workplace skills (64 percent strongly agree).<sup>54</sup> In 2011, the first independent nationally representative survey of 11,000 returned Peace Corps volunteers (RPCVs) found that almost half (47 percent) said that developing career/leadership skills motivated them to join the Peace Corps. Almost all RPCVs (92 percent) agreed that the Peace Corps experience changed their life, and 60 percent of respondents reported that their service influenced their career choices. After returning from service, one-third of RPCVs pursued careers in education, while another third worked in the nonprofit sector.<sup>55</sup> Various public-service fields (including community health, economic development and education) have invested in national service as a strategy to attract new talent.

Increasingly, service year programs have developed strategies to enable corps members to build their skills and credentials, in some cases including the ability to earn college credit. In recent years, programs have formed partnerships with colleges and universities to develop innovative strategies that enable participants to earn postsecondary credit for college-level learning through their programs, and

incorporated opportunities to earn “microcredentials” as well as traditional certifications. These opportunities would be of significant benefit to any individual looking to enter a new career, regardless of age, and could help 50+ adults transition to an encore career with purpose.

## History of Encore Service

The value of service for encore-stage adults has long been understood. In fact, long before Ethel Percy Andrus founded AARP in 1958, she wrote that adults “have a responsibility to remain active in retirement . . . [and] to cooperate with responsible . . . agencies concerned with programs and activities that will make our nation strong.”<sup>56</sup> Andrus founded AARP with the motto “To Serve, Not to Be Served” and believed, “We learn the inner secret of happiness when we learn to direct our inner drives, our interest and our attention to something outside ourselves.” Honoring Andrus after her death in 1967, President Lyndon Johnson said, “The life of each citizen who seeks relentlessly to serve the national good is a most precious asset to this land . . . by her enduring accomplishment, she has enriched not only us, but all succeeding generations of Americans.”<sup>57</sup> The first U.S. Commissioner on Aging, William Bechill, said, “Dr. Andrus was one of the first to realize that our nation was neither seriously facing the questions of meaningful use of the retirement years nor concerned enough with a place of respect and purpose of older people in the world around us.”<sup>58</sup>

The earliest federal programs supporting service for experienced adults, created a half-century ago, were means-tested. The Senior Community Service Employment Program (SCSEP) was authorized in 1965. Authorized by Title V of the Older Americans Act (OAA), SCSEP started as Operation Mainstream, a demonstration program funded by the Office of Economic Opportunity that employed about 300 older men in rural community beautification projects in four states.<sup>59</sup> That same year, Congress authorized the Foster Grandparent program, based on a model developed by the National Council on Aging, to provide small stipends to low-income older adults to assist vulnerable children and youth. In the early 1970s, the Senior Companion Program was authorized to employ a similar model to engage low-income seniors to help frail elderly and disabled adults to remain in their own homes, and the Retired Senior Volunteer Program (RSVP) was created to engage adults 55+ in community service. In 1990, authorizations for Foster Grandparents, Senior Companions, and RSVP were doubled, and in 1994, they became known as Senior Corps, newly administered by the Corporation for National and Community Service. While appropriated funding for Senior Corps programs grew steadily, to a high of \$221 million in 2010, funding and available service opportunities have since declined.<sup>60</sup>

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***The earliest federal programs supporting service for experienced adults [were] created a half-century ago.***

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In addition to these programs for experienced Americans, national full-time service programs initially designed for young adults have also successfully engaged 50+ adults. Originally aimed at recent college graduates since its creation in 1961, the Peace Corps today engages a growing number of encore-stage adults. Authorized in 1994, AmeriCorps also originally focused on attracting young adults to serve their country, but had no age cap. It provided funding for Experience Corps, proposed by John Gardner and launched by Marc Freedman, Linda Fried and Tom Endres, to engage 50+ adults to assist in elementary school classrooms.

Based on the success of this and other AmeriCorps programs engaging experienced adults, the Edward M. Kennedy Serve America Act of 2009 authorized a minimum of 10 percent of AmeriCorps positions for older adults, and made education awards transferrable to a child, grandchild or foster child. It also created a new Silver Scholarships Grant Program, providing a \$1,000 higher education scholarship not connected to AmeriCorps to people age 55+ who complete at least 350 hours of service in a year in an area of national need, as well as an encore fellowship program, neither of which has ever received appropriated funding. Unfortunately, federal programs for service have experienced limited growth over the last decade, notwithstanding extraordinarily high levels of demand.

In recent years, a movement advancing skilled volunteering has coincided with the first waves of Baby Boomers reaching retirement age. A range of nonprofits and other initiatives have targeted pro bono opportunities, increasing nonprofit utilization of skilled volunteers, and service by experienced adults using their professional capabilities. These efforts have been enabled by online platforms, including for-profit social media sites such as LinkedIn and Catchafire.

Encore.org (then Civic Ventures), the organization that piloted Experience Corps, has continued to contribute to this field by developing the Encore Fellowships Network, which connects experienced adults with nonprofit organizations; The Purpose Prize, which honors older social innovators; and other initiatives. Encore.org has been joined by AARP, which in addition to taking over responsibility for Experience Corps, has promoted volunteering through its Create the Good initiative. Another growing effort, ReServe, incubated by the Blue Ridge Foundation, has become New York City's primary pathway for connecting professionals 55+ with part-time, modestly stipended service opportunities in nonprofits, community-based organizations, government agencies and other public institutions. It has expanded to additional cities. Generations United, founded in 1986 to advocate for inter-generational collaboration and support, has long championed intergenerational service as a major strategy to bridge older and younger generations.

### ***A Model for Encore Innovation***

After decades in the tumultuous telecommunications industry, Charles Fletcher retired in the 1990s at the age of 58, cash-strapped and full of stress. As a child growing up poor in Tennessee, Charles worked in cotton fields and factories to pay for his first horse. As a retiree, he drew on his long love of horses to find some peace of mind through volunteering at a Dallas-area equine therapy center for children with disabilities.

At the center, Charles witnessed a special connection between the children and horses, but he thought the program could do more than offer feel-good pony rides. It had the potential to heal. Fletcher spent countless hours researching equine therapy methods. He reached out to medical specialists, learned about brain development and began building a network of experts. He plowed his Social Security checks into launching SpiritHorse, which grew over time into the nonprofit SpiritHorse International.

In 2001, Charles, then 63, opened the gates of his Texas ranch with just three riders and two ponies. Word quickly spread, mostly through referrals from parents and doctors, and Charles launched an encore career that has since changed more than 5,000 lives worldwide.

Through innovative therapies, nonverbal children have spoken their first word, "go," atop a SpiritHorse pony. Others have walked their first steps or sat up independently for the first time. Two independent studies have documented significant decreases in autism symptoms; 12 children originally diagnosed with autism have achieved the designation "non-autistic."

These outcomes have garnered attention worldwide, from equine centers and academic researchers. Charles and his staff have trained and licensed 91 other centers in the U.S., South America, Africa and Europe. Based on this work, Charles received The Purpose Prize in 2014.

The next generation of service efforts engaging experienced Americans to help vulnerable youth will and should integrate two powerful trends that are shaping current and future public policy today – the role of social innovation (and the structures being put in place to foster it), and the call for greater evidence to prove the effectiveness of programs over time, so they can be expanded to meet rising need. Based on its extensive evidence base, Experience Corps was awarded a Social Innovation Fund grant to pilot a lower-cost model, to increase the number of children reaching the critical benchmark of reading fluently by the end of the third grade. The AARP Foundation will be evaluating whether this more cost-effective and scalable small-group intervention is as effective as the higher cost, one-on-one tutoring approach.

## Best Practices

As the nation explores engaging 50+ Americans to serve vulnerable youth at this critical juncture, such efforts must employ best practices that reflect a comprehensive understanding of the attitudes and behaviors of older adults. All service projects benefit from some common elements – most notably, strong management, provided by staff or other volunteers; training; and recognition for a job well-done. However, while experienced adults are a diverse group, with a wide range of preferences and capabilities, certain practices are generally correlated to successful service engagements of encore-stage adults, particularly Baby Boomers.

**Time.** Evidence suggests that experienced adults prefer service opportunities that are intensive, but less than full-time.<sup>61</sup> Part-time service opportunities can have a tremendous impact, particularly if they are sustained over a number of years. Tailoring service programs to complement the schedules of encore-stage Americans can increase the likelihood of such longer terms of service.

**Flexibility and Control.** Experienced adults, like others, value the opportunity to set their own hours and choose their activities, whether they are retired or still working.<sup>62</sup>

**Long-term.** Individuals who serve for longer than a year are likely to continue to serve, which suggests that organizations interested in engaging and retaining experienced adults might begin to engage them before retirement and enable them to continue to serve as long as they wish.<sup>63</sup>

**Stipends, Incentives and Compensation for Expenses.** Research from Experience Corps shows that even modest financial benefits can lead to longer periods of service and increased participant diversity. In fact, the study found that participants with and without stipends had similarly altruistic motivations, but volunteers with stipends reported higher perceived benefits of participation than volunteers without them. These results suggest that stipends may promote program inclusion, efficiency and effectiveness.<sup>64</sup> Additional benefits, such as rewards and discounts, transportation reimbursement, reciprocal service or other tangible incentives might also increase participation. AARP has been extremely effective

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***Part-time service opportunities can have a tremendous impact. . . . Intergenerational service can help build social trust and strengthen social cohesion.***

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at providing membership incentives and rewards to its members. Similarly attractive benefits should be developed by other groups for encore-stage Americans who step up to serve their communities and the nation.

**Social Opportunities.** Experienced adults are drawn to opportunities where they can work with like-minded individuals toward a common goal. Successful recruitment efforts establish a positive group identity. The social aspect of service – being part of a team, meeting new people and social opportunities connected to service – support retention and health benefits. As discussed earlier, many people choose to serve after they have lost a spouse, possibly as a way to counter isolation and meet new people. In addition, evidence suggests that individuals who volunteer with a spouse are more likely to be retained in service.<sup>65</sup> Such service among people of different backgrounds, including intergenerational service, can also help build social trust and strengthen social cohesion in communities, even when such trust and cohesion are at historically low levels.

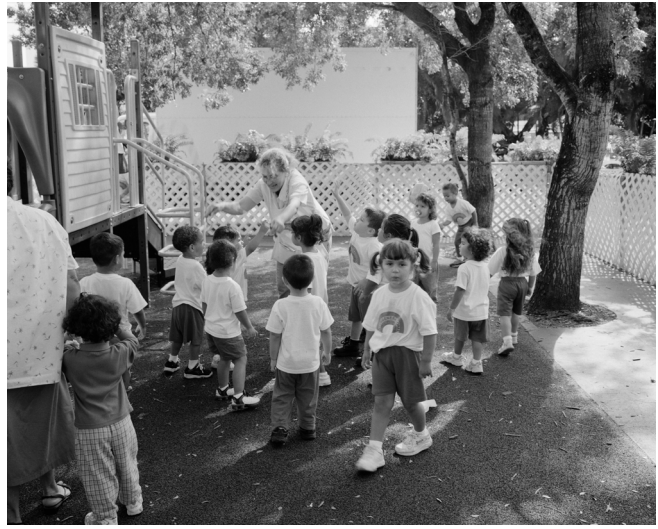
**Skills and Interests.** Many experienced adults prefer to use their well-honed skills rather than engage in relatively unskilled activities. Alternatively, they may choose service activities that help them to build new skills, potentially leading to an encore career. Surveys show that many of the most highly skilled people in the U.S. workforce are eager to serve, including by helping vulnerable youth.<sup>66</sup>

**Impact on Children and Youth.** In surveys of volunteer preferences, serving children and youth through education and other programs ranks second, with only religious service rated higher.<sup>67</sup> Furthermore, the ability to see the impact of service and be part of something larger contributes to both retention and a sense of purpose, which is strongly related to positive health outcomes for those who serve.<sup>68</sup> Recruitment should therefore emphasize the overall mission of the project, not just the task at hand.

**Barriers.** Barriers may deter encore service by experienced adults in support of children and youth. In some cases, a basic lack of interest in service, skepticism about the value of service or limited capacity to recruit and manage volunteers may limit engagement regardless of participants' age. Ageism presents an additional barrier, as organization staff may imagine 50+ adults to be less able than younger adults, picture encore-stage volunteers performing stereotypical volunteer functions that require little skill or offer little value, or hold a variety of other inaccurate views.<sup>69</sup>

On the other hand, some prospective volunteers may be deterred by difference or intimidated by the unfamiliar; for example, they may be hesitant to travel to new areas or work with youth in communities that are unknown to them. Logistical challenges, such as transportation, limited digital literacy, or lack of resources to support background checks or other costs associated with service, may also deter older adult participation or recruitment. Adults of all ages, including 50+ adults, may have responsibilities at home that limit their ability to participate in service. Finally, without a personal connection, organizations and potential service participants may not find one another, as organizations may be limited in their ability to undertake outreach and experienced adults may not know where to find opportunities. These barriers are real and must be adequately addressed as the nation works to harness the talents of encore-stage adults and help close the opportunity gap for young people.





## THE WAY FORWARD

The national need to link older and younger generations could not arise at a more compelling moment. The crisis is clear – a growing opportunity gap for young people, the lack of access to ladders of social and economic mobility, historically low levels of trust in each other and in key institutions, a political climate defined more by paralysis than by progress, the emerging insolvency of our entitlement programs and the possibility of generational infighting over all of these struggles. It is time to act. We propose a new initiative called, “Encore Service for Youth,” a bold national challenge and set of public policy proposals and private initiatives that will tap the talents and energies of a generation of experienced Americans who want to give back to their country.

### ***Encore Service for Youth***

The public, nonprofit, philanthropic and business sectors should collaborate to create a nationwide initiative, **Encore Service for Youth**, to marshal the talents of **encore-stage adults to boost opportunity for vulnerable children and young people within a decade.**

To achieve this, service opportunities should be developed by infusing existing efforts and funding streams with desperately needed human capital to help disadvantaged youth, and through innovation funds, various existing programs, and more flexible program designs and other strategies that support impact rather than dictate a specific intervention or delivery system. We do not recommend new federal programs focused on single models. Rather, we have outlined a policy and practice agenda that can spur a national competition for the best ideas.

### ***An Encore Service Year***

At the heart of this new effort to engage millions of experienced Americans, an Encore Service Year should be supported through public and private efforts that could, by 2025, mobilize one million experienced adults every year to dedicate a year of service to improve the life prospects of vulnerable youth.

As Marc Freedman has stated, highlighting the 50<sup>th</sup> anniversary of the Foster Grandparents Program, these people “would deploy their accumulated experience to improve early childhood education, help children read and assist high-school students graduate and make the transition either to school or work. . . .Doing so could help transform the longevity revolution into a social transformation benefiting every American, not only now, but for generations to come.”

**Fully Fund the Serve America Act.** Existing law, if funded, could provide the base for Encore Service Years. AmeriCorps, supported in part by VISTA and National Service grants along with nonfederal funds, enables adults of all ages to spend a year providing full-time (or substantial part-time) service. Members receive a modest living allowance, health care and child-care benefits, as well as a Segal education award, which can be used to pay for college or pay back student loans, and can be transferred to a child or grandchild. Fully funding the Edward M. Kennedy Serve America Act would increase opportunities for Americans of all ages to serve by increasing AmeriCorps from 75,000 to 250,000 positions by 2017, with 10 percent of positions targeted to engage people age 55 and older. It authorizes provisions to improve service options for experienced Americans by expanding age and income eligibility for Foster Grandparents. It also creates a Silver Scholarships program through which individuals 55 and older who perform 350 hours of service receive a \$1,000 education award, and establishes Serve America Fellowships and Encore Fellowships. The Act has not, however, received sufficient appropriations to achieve these goals. None of these efforts has yet received appropriated funding.<sup>70</sup>

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***An Encore Service Year, supported by public and private efforts, could – by 2025 – mobilize one million experienced adults every year.***

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**Self-Funding Options.** New funding options should be developed to help experienced adults support their own Encore Service Year. For example, Marc Freedman has proposed that “individual purpose accounts” – tax-advantaged savings accounts to underwrite transitions to an encore career – could be modeled on 529 plans, or that new options be created in Social Security, to enable individuals to stop and start Social Security payments without regard to age. An individual interested in a transitional service year might opt to start Social Security payments for a year at any point after age 50 and then suspend the payments the following year, to pursue an encore career. (The benefit could be made actuarially neutral by requiring the individual to continue to work an extra year before resuming Social Security benefits.) Freedman notes, “These modifications in Social Security would allow many individuals to make fuller use of the great gift of longer lives, and the growing necessity of continuing to earn a paycheck beyond traditional retirement age. It would, likewise, send an important signal that the nation needs and values the vast human capital present in the older population – and is willing to do more than simply exhort people to keep contributing. It would demonstrate a willingness to meet them halfway.”<sup>71</sup>

**Service Year Exchange.** In addition to providing funding for these authorized programs, making Encore Service Years a common opportunity will require systems to help match those who want to serve with appropriate opportunities. Such a system could be based on the newly developed private-sector Service Year Exchange, currently targeted at young adults, which is designed to facilitate the develop-

ment of new positions and to help connect programs and participants. The exchange permits any public or private organization to create and certify full-time, full-year service positions. It enables individuals to search for positions that suit their interests and attract public, private or crowd-funding to support living stipends. The Exchange will incorporate learning functions to accelerate the ability of corps members to earn credentials and college credit.

**Peace Corps.** The Peace Corps, a two-year service commitment that sends Americans of all ages to nearly 80 countries around the world, is increasingly tapping the talents of encore-stage Americans. Through recruiting efforts, the Peace Corps now reports that 7 percent of its volunteers are 50+. A nationally representative survey of more than 11,000 returned Peace Corps volunteers showed that the number may be as high as 11 percent. Consistent with Encore Service projects for vulnerable youth, many Peace Corps volunteers are teachers, work in health care or on environmental issues in ways that benefit rising generations. The President should initiate an “Encore in the Peace Corps” program, including the allocation of additional funding, to grow the Peace Corps to at least 10,000 positions each year, of which 20 percent could be filled by volunteers age 50+, who would bring their skills and talents to Peace Corps projects in education, health and conservation.

**White House Fellowships for Encore-Stage Americans.** Founded in 1964, the President’s Commission on White House Fellowships is described as “one of America’s most prestigious programs for leadership and public service. White House Fellowships offer exceptional young men and women first-hand experience working at the highest levels of the Federal government. Selected individuals typically spend a year working as a full-time, paid Fellow to senior White House Staff, Cabinet Secretaries and other top-ranking government officials. Fellows also participate in an education program consisting of roundtable discussions with renowned leaders from the private and public sectors. Fellowships are awarded on a strictly non-partisan basis.”<sup>72</sup> Missing from this scenario are opportunities for experienced-adult Fellows to contribute at the highest levels of government. New efforts could focus on how encore-stage adults could be mobilized to meet the goals of youth-serving programs.

**The Senior Community Service Employment Program.** Authorized by the Older Americans Act, this community service and work-based job-training program provides training for low-income, unemployed Americans over age 50. Participants also have access to employment assistance through American Job Centers. It is funded at approximately \$400 million annually. SCSEP participants gain work experience in a variety of community service activities at nonprofit and public facilities, including schools, hospitals, day-care centers and senior centers. Participants work an average of 20 hours a week, and are paid the highest of federal, state or local minimum wage. This training is intended to serve as a bridge to unsubsidized employment opportunities. The SCSEP should be transferred to the Corporation for National and Community Service and redesigned to support innovative strategies to help low-income 50+ adults gain experience through service and support the transition to encore careers.

**Intergenerational Corps.** Service-year programs could incorporate intergenerational elements at no additional cost, connecting older and younger corps members and bridging the generations in shared service. For example, the Civic Spark program in California engages part-time, encore-stage corps

members as regional coordinators, each leading three to eight young AmeriCorps members in environmental activities. While few programs currently intentionally incorporate intergenerational elements, many programs, including youth corps, could benefit from an intentionally intergenerational approach, particularly those that incorporate formal or informal mentoring.

### ***Innovation, Competition, Accountability***

As new technologies become available and increasing evidence emerges regarding “what works,” innovation is essential to identify and test strategies. Innovation must be coupled with a system to measure impact, in order to direct funding to programs that can achieve the greatest impact most efficiently. In recent years, new policy tools have emerged to identify and scale up high-performing interventions that could accelerate the development of high-impact Encore Service programs.

**Social innovation.** The Social Innovation Fund (SIF), administered by the Corporation for National and Community Service, provides grants to private-sector grantmakers and other intermediary organizations to support the scaling of programs that are backed by high levels of evidence. These grant funds are matched twice – first, by the intermediary, and then, by the program. In just three years, a total of \$241 million federal SIF dollars have leveraged an additional \$516 million nonfederal dollars in support of results-focused programs to improve the lives of people living in low-income communities.

The existing authority for the SIF would allow for prioritizing programs that use Encore Service. In 2015, AARP Experience Corps received \$3 million in SIF funding to help grow Experience Corps to improve childrens’ reading skills, enrich the lives of volunteer tutors and strengthen schools in local communities. The AARP Foundation will use a competitive grant program to identify seven sites with high proportions of struggling readers, representing 28 schools and 4,000 children. An independent evaluator will investigate the effectiveness and efficiency of small-group tutoring (three to four children) and small-group-plus-classroom-wide assistance strategies, with the goal of expanding the impact and reach of the program to greater numbers of children and schools. (The original Experience Corps model pairs one student with one tutor.) By targeting schools in communities with large percentages of K-3 students who are reading below grade level and providing well-trained experienced adult volunteers as literacy tutors, it is hoped that the young students served will accelerate their literacy achievement and read on grade level by the end of third grade.

In addition to prioritizing service delivered by adults in encore roles, the SIF could also be modified to enable programs to provide a portion of its matching requirement in the form of service hours, including skilled volunteering, which could provide a boost to Encore Service. Other agencies could develop innovation funds that would open doors for service strategies. For example, Head Start, which has a complex set of program delivery requirements, could be authorized to issue competitive grants to inspire innovative approaches like Encore Service to achieve specified outcomes.

**Place-based strategies.** Over the last decade, hundreds of communities have undertaken “collective impact” efforts, in which organizations align around the achievement of agreed-upon goals.

One well-known example, the Strive Partnership, engaged more than 300 cross-sector leaders in 2006 with one goal in mind: to improve academic success in greater Cincinnati's urban core. They agreed on a common set of goals, outcomes and success indicators, including kindergarten readiness, fourth-grade reading and math scores, high school graduation rates and college completion. The partnership recognized that aligning their work, setting goals together and investing in a common vision would fundamentally change how they approached the larger system of education. Due to this effort, 89 percent of the indicators the partnership tracks and reports on annually were trending in the right direction in 2012-13.<sup>73</sup>

In Madison, Wisconsin, the superintendent of schools sought to reduce the achievement gap between white students and students of color. In response, the local United Way convened a diverse group of volunteer programs, including RSVP, to tutor children in reading. In less than a decade, the achievement gap was closed.<sup>74</sup>

In 2014, the Corporation for National and Community Service experimented with place-based grant-making with Operation AmeriCorps, which provided AmeriCorps grants, VISTA AmeriCorps members and temporary support from the National Civilian Community Corps based on plans submitted by local leaders. A similar approach could inspire the use of Encore Service to solve an important problem facing youth in the community.

**Expand the evidence base.** Data are essential to determine which innovations are successful for which populations. However, the nonprofit sector in general is underinvested in data measurement and evaluation. The Innovation Network's State of Evaluation 2010 reports that many nonprofits face significant challenges in conducting effective evaluation, with 71 percent indicating that limited staff time is a significant barrier, followed by lack of financial resources (57 percent) and lack of in-house evaluation expertise (43 percent).<sup>75</sup> This challenge is particularly pronounced for small organizations. Although experts recommend nonprofits spend 5 percent of their budget on evaluation, for organizations using low-cost human capital strategies such as service, 5 percent of the budget may be too little to fund a meaningful study. More than a third of nonprofits reported that none of their funders supported their innovation work.

In addition to traditional evaluation strategies, technology has made it possible for organizations to participate in shared data sets that enable them to measure and compare outcomes with other similar organizations. For example, Algorhythm.io offers youth-serving organizations, including those using service strategies, to participate in a data-sharing peer network that uses reliable, valid metrics. Such shared databases can advance the use of predictive analytics, statistical techniques commonly used in the private sector to analyze current and historical facts and identify patterns that inform decision-makers predictions about future, or otherwise unknown, events.

Because of the importance of measuring impact to advancing practice and attracting resources,<sup>76</sup> increased investment in data and evaluation in the field go hand-in-hand with expanding Encore Service.

The Corporation for National and Community Service should expand evaluation funding for both Senior Corps programs as well as Encore Service programs not funded by the corporation. This fund should prioritize participation in shared data sets and provide evaluation support using the tiered-evidence model adopted by the Social Innovation Fund.

**Pay for Success.** “Pay for Success” is a program that ties funding to outcomes; pilots are underway at all levels of civic and state government. In some cases, private investors provide upfront funding and receive a modest premium on their investment if goals are achieved. Ideally, programs are structured to allow providers the flexibility to adapt their services (including the mix of services, who provides them and how they are offered) for greater impact or to reduce costs. Programs receive public funding only if they achieve agreed-upon benchmarks. In most cases, these programs involve public-private partnerships, where private investors assume the risk of failure and the government pays only if success is achieved. Existing “Pay for Success” programs focus on reducing recidivism (Massachusetts and New York), providing early childhood programming in order to reduce special education referrals (Utah), workforce development (multiple sites) and other challenges.<sup>77</sup> “Pay for Success” programs could be developed to utilize Encore Service in a variety of ways. For example, contracts could be structured to engage:

- Foster Grandparents, RSVP and Experience Corps members, to support early reading efforts, with funding provided once specific reading achievement levels are attained;
- RSVP and other Encore Service members, to support youth employment through the process of applying for, obtaining, and succeeding in a job, with funding provided once youth have been employed for a specified length of time;
- Foster Grandparents, RSVP and other Encore Service programs, in providing coaching to new parents, with funding provided only when the children meet goals for their health and development goals.

**Encore Service Prize.** Prizes have also emerged as a way to stimulate, develop, identify and celebrate innovation, often at a relatively modest cost. The Eisner Prize, for example, was launched in 2011 to recognize excellence by an individual or a nonprofit organization in uniting multiple generations, especially seniors and youth, to bring about positive and lasting changes in a community.

An Encore Service Prize could be jointly sponsored by the Corporation for National and Community Service, a youth-serving federal agency and a private-sector funder to identify ways that Encore Service can improve outcomes for youth. The President could honor winners at The White House, and the private sector could create similarly attractive events and related social media to ensure that the best ideas and model programs are shared widely with policymakers and stakeholders at the community, state and national levels.

### ***Encore Service through Youth-Focused Funding Streams***

In 2003, the White House Task Force for Disadvantaged Youth reported that 339 federal programs across 12 departments and agencies spent \$225 billion annually to help disadvantaged youth.<sup>78</sup> A decade later, the White House Council on Community Solutions reported that there was an economic case for investing in vulnerable youth, given that there are millions of “opportunity youth” who are disconnected from school and employment and cost taxpayers \$93 billion every year.<sup>79</sup> Public dollars support myriad programs to benefit vulnerable youth from infancy to young adulthood, such as Head Start, Maternal and Child Health, the Elementary and Secondary Education Act, TRIO and youth employment. In many cases, these dollars are linked to specific interventions provided through identified delivery systems, some of which lack the flexibility to incorporate Encore Service or fund nonprofit partners. Others offer sufficient flexibility but no incentives to look beyond traditional approaches.

Policymakers interested in leveraging the significant resource represented by experienced adults could make youth-focused funding streams more flexible and incentivize the incorporation of Encore Service. For example, Head Start, which is supported by federal grants to nonprofit organizations and public agencies to operate Head Start centers, might pilot the use of Encore Service to provide early literacy skill-building programs based on the Jumpstart model, given the strong evidence-base of its effectiveness in boosting literacy, school readiness and social and emotional development.<sup>80</sup>

Building on the work of the White House Task Force for Disadvantaged Youth and the White House Council for Community Solutions, the President could issue an executive order instructing departments and agencies to identify existing programs serving youth that could utilize Encore Service members to boost outcomes. Armed with such information, initiatives could be developed within such departments and agencies to support modest living stipends and other funding to engage encore-stage Americans to help youth. Such an initiative would have a triple bottom line – improving outcomes for vulnerable children, improving health and wellness of older Americans and improving trust and cooperation between the generations.

**Senior Corps.** Senior Corps provides long-term funding based on three different models: Foster Grandparents, which serves vulnerable children and youth, Senior Companions, focused on the frail elderly, open only to low-income seniors who receive modest stipends; and RSVP, which is open to all adults 55+ and does not restrict the service or stipends for those who serve. All three programs are supported directly by the federal government. Unfortunately, significant legislative and regulatory restrictions make it difficult to redirect funding to new locations or new grantees as new opportunities emerge.

Both Foster Grandparents and RSVP, however, provide significant flexibility at the local level, in terms of service activities. While this flexibility is important, it also leaves each grantee without guidance regarding effective interventions to support their locally determined goals and funders without clarity regarding

the programs' impacts. To address these issues, and enable the programs to thrive and grow in today's policy climate, policymakers should incentivize grantees to participate in a common data-collection framework that enables them to measure their outcomes at a low cost and in a manner that enables not only cross-program comparisons, but also helps programs determine the appropriate interventions and "dosages" (such as the amount of time spent with each child), for service recipients and volunteers alike. A competitive pool of funding should be set aside to support individual program evaluations for grantees that show evidence of greatest impact. Those organizations whose programs demonstrate consistently good results should receive waivers that provide them greater latitude for innovation and experimentation with program design and implementation. They should also have access to research and development funds in order to test innovations. Those that are successful should be promoted throughout the Senior Corps network.

In addition, the Corporation for National and Community Service should expand opportunities for non-federal funding of Foster Grandparent programs, similar to its AmeriCorps partnerships. For example, Syracuse, New York, Public Schools are providing funding so that every first- and second-grade classroom has a Foster Grandparent for extra support.<sup>81</sup>

## Barriers and Incentives

To encourage and facilitate Encore Service, policymakers should remove barriers and provide incentives that will appeal to a wide variety of encore-stage adults.

**Raise the Charitable Mileage Deduction.** Volunteers who drive their own cars for a charity can only deduct 14 cents per mile driven, far less than the 58.5 cents per mile that is the current norm for business driving.<sup>82</sup> While the business rate was raised in 2008 to account for climbing gas prices, the charitable mileage deduction has not been changed since 1998.<sup>83</sup> Legislation in Congress to raise the charity rate to 58.5 cents-per-mile should be passed.

**Streamline Background Checks.** Background checks of encore volunteers working with children and youth should be performed prior to their service and kept current. Unfortunately, federal policy has made background checks for individuals funded by the Corporation for National and Community Service, including Foster Grandparents, more expensive and cumbersome, without necessarily increasing safety. National Service Criminal History check regulations have been in effect since November 2007 when specific programs first required two-part background checks, and only for individuals in recurring contact with a vulnerable population. Coverage was expanded in 2009 to all national service programs and covered individuals even without contact with vulnerable populations. Beginning April 21, 2011, the law required that programs conduct three-part checks – including FBI, statewide repository and sex-offender registry checks – on individuals who will have recurring contact with vulnerable populations. Not only do these checks sometimes fail to reveal criminal activity in a jurisdiction that does not report to the FBI, or does not report in a timely manner, they are costly and may need to be repeated multiple times as volunteers

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***A Volunteer Fast-Pass  
[would] enable  
volunteers to share their  
background screening  
results with multiple  
organizations.***

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change positions. Policymakers should review and revise this system to ensure that background-check requirements are effective, streamlined, affordable and portable. For example, the law might allow for systems such as the Volunteer Fast-Pass, which enables volunteers to share their background screening results with multiple organizations, to suffice for most Encore Service volunteers.

***Ease the Transition into Encore Service.*** Although Encore Service appeals to a large segment of 50+ Americans, identifying positions and opportunities to serve can be a barrier. Programs like the Encore Fellowships Network and ReServe play an important role in matching skilled individuals to opportunities with nonprofits, but they presently operate on a small scale, relative to the potential market. Public investment in infrastructure, including technology and awareness, could help individuals transition to new opportunities.

In addition, data shows that individuals who volunteer while working are likely to continue to serve into retirement. Tax incentives could encourage employers to enable employees nearing retirement to reduce their work hours or gain flexibility if they volunteer a certain number of hours a week.

***Provide incentives.*** A nationally representative survey of experienced Americans showed that they prefer transferable education awards to group health insurance, monthly stipends and vouchers, and recognition by the President as a key motivator to increase service and volunteering.<sup>84</sup> Toward this end, the federal government should expand and fund the Silver Scholarships program, which was authorized in the Edward M. Kennedy Serve America Act, to provide transferable education awards (explicitly allowing the award to be used by the individual's child, foster child, or grand child) of a minimum of \$1,000. Transferability should be expanded to enable the older adult to transfer the award to the child who is being mentored or otherwise helped. A pilot of the Silver Scholarships program could test the degree to which such scholarships serve as an incentive to engage more experienced adults in service, keep them engaged and boost outcomes for the youth they serve. Public agencies, nonprofits, higher education institutions and businesses could offer incentives in addition to education awards, to individuals who make a substantial commitment to service. Such incentives could include free transportation, museum, theater, and movie tickets, college courses, park passes, store discounts and property tax breaks.



## CONCLUSION

An Encore of Service for Youth would tap the talents of experienced adults eager to help vulnerable youth climb the ladders of opportunity and counter concerns they are leaving the world in worse condition than they found it – both now, and for generations to come.

Ample evidence from an increasing number of programs and initiatives to engage experienced Americans in serving youth prove of their effectiveness. America suffers many challenges that an Encore of Service could help address – the opportunity gap that is limiting the life chances of millions of children; a health crisis among an aging population whose service could add so much life and engagement to those increasing years; and low levels of social and institutional trust that are fraying our communities.

Experienced, encore-stage adults are ready to serve. They possess vast stores of knowledge and experience, developed over a lifetime. Our times call for a large-scale community-based effort to engage experienced Americans in reaching across the generations and to help our most vulnerable youth reach their potential – and to rekindle the spirit of our nation, united in its commitment to the future and future generations.

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<sup>84</sup> See Bridgeland, J., Putnam, R., & Wofford, H. (2008). More to Give: Tapping the Talents of the Baby Boomer, Silent and Greater Generations. *Civic Enterprises with Peter D. Hart Research Associations*. Encore.org. (2015).

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