

Life Options

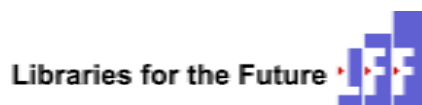
BLUEPRINT

Civic Ventures
Libraries for the Future
The Virginia G. Piper Charitable Trust

May 2003



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Civic Ventures

Civic Ventures is a national nonprofit organization that works to expand the contributions of older Americans to society, and to help transform the aging of American society into a source of individual and social renewal. Civic Ventures seeks to tap the talents and skills of older Americans by developing avenues for meaningful community service. In pursuit of this mission, Civic Ventures promotes new ideas, strengthens infrastructure, and establishes new institutions.

Civic Ventures has developed the Life Options concept to assist adults making the transition from midlife to a new life stage characterized by opportunities for connection and direction. The Life Options initiative builds on the knowledge that access to meaningful choices for work, service, lifelong learning and community connections plays an important role in the health and ongoing development of older adults and to linkages to the life of the community and its needs.

Libraries for the Future

Libraries for the Future is a national nonprofit organization that champions the role of libraries in American life and helps individual libraries become more effective community institutions for the future. Founded in 1992 and now working in 25 states, LFF mobilizes private and public support for libraries, schools, and community partners to achieve equal access to the information and knowledge essential for a democratic society. LFF works to promote awareness, expand support, and increase use of libraries, as well as to develop their capacity to serve increasingly diverse communities in the digital age. Libraries for the Future manages programs including Life Options Libraries, Youth Access, a program that builds literacy and communications skills and civic participation, and Family Place, a program that transforms libraries into centers for healthy child development and family literacy.

The Virginia G. Piper Charitable Trust

The Virginia G. Piper Charitable Trust is dedicated to honoring Virginia Piper's legacy of philanthropy to nonprofit organizations whose work enhances the lives of people in Maricopa County, Arizona. Virginia Piper, the widow of Paul Galvin who founded Motorola, left a legacy of giving, a passion for service to others and a sense of stewardship, which are the cornerstones of the Trust that bears her name. Following her lifelong commitment to improving the community, the Trust directs assistance to programs that support children, the elderly, arts and culture, healthcare and medical research, education, and religious organizations. It endeavors to be a partner, educator, and problem solver as well as a grantmaker.

Acknowledgements

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Welcome to the Life Options Initiative!

- ✓ Today the average American can expect to celebrate 77 birthdays.
- ✓ In the 1950s men retired at about age 67 and women at 68. Today retirement age is much lower — around age 62 for men and 61 for women.¹
- ✓ One of 77 million Baby Boomers turns 50 every 7 and a half minutes. By 2030, every boomer will be 65 or older.²
- ✓ Americans 45 years or older accounted for 35% of the population in 2000. By 2025, that share will be 43%.³

The reality of an aging nation has been discussed so much that the statistics no longer shock us. The figures, though, can still prompt us to marvel at the tremendous effect that more people living longer is having on our communities.

With support from The Virginia G. Piper Charitable Trust, Civic Ventures and Libraries for the Future have joined forces with other organizations in metropolitan Phoenix to respond to aging trends in a notable, creative way. The Phoenix-area effort, this Life Options Initiative, along with others across the U.S. will move all of us from the “wow” of aging to determining how institutions can assist residents with the transition to another life stage — that of meaningful retirement.

Our goal now for metropolitan Phoenix is to implement the ideas behind Life Options in real time with real people. Demonstration sites are the next logical step, and pilot planning builds on the significant accomplishments of the Maricopa County Commission on Productive Aging. Between September 2002 and January 2003, this group of 71 community leaders studied how aging and retirement are changing and how new ideas about service, community spaces, and choices might be put into practice. The Commission’s energy and insights began an exciting process of change in metropolitan Phoenix and set the stage for this Life Options Initiative.

We hope the *Life Options Blueprint* assists you and your institution to look at aging in new ways, and then helps you create places and programs that marry productive aging to civic engagement. As we have said before, the Life Options Initiative is “not just a new coat of paint” on outmoded practices and ideas for those over 50. We are looking for the bold statement, the bright contrast...the big ideas that will benefit older adults and communities everywhere.

Marc Freedman
Civic Ventures

Diantha D. Schull
Libraries for the Future

Maricopa County Commission on Productive Aging

Chaired by civic leader Jack Pfister and City of Phoenix Department of Libraries director Toni Garvey, the Commission initiated a process of change in metropolitan Phoenix — altering attitudes toward older adults, retirement, volunteering, expectations of institutions, designs for public and educational places, and how professionals and activists understand and relate to one another’s work. The Commission was developed and staffed by Libraries for the Future and Civic Ventures as the first component of a Life Options Libraries project. The Life Options Initiative capitalizes on Libraries for the Future’s push for libraries that strengthen education and civic life and complements Civic Venture’s vision for educational and service opportunities for older adults.

Using the *Life Options Blueprint*

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The *Life Options Blueprint* seeks to answer the questions you may have as you begin planning your Life Options project and provides examples and resources that will spark your creativity.

Most important, it:

- Defines What a Life Options Center is and what distinguishes it from other types of programs
- Describes the standard features and practices expected in a Life Options Center, regardless of whether the project is in Cleveland or Phoenix
- Provides an annotated list of print and web resources for future reference

Just as Life Options is no ordinary idea, this Blueprint includes an unorthodox feature for its users. Often a planning process for something outside the proverbial box makes us examine our own beliefs and their effects on our work. To help you develop your own insights, you will see “Life Options Exercisers.” These quick questions or activities are intended to make the planning process rewarding for you personally as well as professionally.

Many wise people have counseled that the journey is as important as the destination. This advice certainly relates to Life Options. As you use the Blueprint, enjoy the process of learning and creating something new and exciting.

Part I

Why Life Options Now?

For the past 30 or 40 years, few ideas have resonated with as many Americans as the idea of freedom represented by:

Choices Options Possibilities

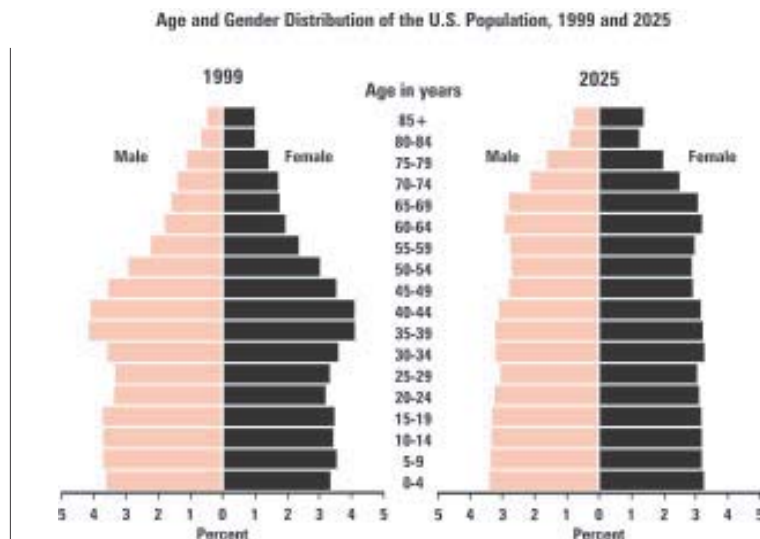
The generation born between 1946 and 1964 was the first to enjoy a stunning array of new freedoms and opportunities. Along with it came the license to: “Go your own way” and “Do your own thing.” Now “in less than a decade, this nation will be home to the largest, richest, healthiest, most mobile cohort of 60-somethings in world history.”⁴ Today’s big question, once again, is about choices: What will these lifelong “doers” decide to do next?

Some observers say that the efforts of our next group of seniors could, and should, help reweave the tears in our social fabric. Others point to the wide diversity of this most-watched generation and caution that tomorrow’s seniors will not be unified in wanting the same things. Others simply acknowledge that it is time to help this group – representing nearly 30 percent of the nation’s population – think about their next life stage and identify choices that will serve both themselves and their communities. No matter what you think about the future, though, perspectives on age and retirement are clearly undergoing a major overhaul.

A Word About Words

A lot of brainpower has already gone into deciding how to refer to those who are over 50, 55, or 65. The *Life Options Blueprint* avoids the difficulty by using every current word for older Americans synonymously. But—and this is vital—everyone designing Life Options Centers will need to test which words work and which don’t in their areas and with their target audiences. Also, Life Options Initiative and Life Options Center are used interchangeably.

Figure 1. The Future Will Feature More Older Adults



Source: AmeriStat, Population Reference Bureau.

New Outlooks on Aging and Retirement

Today's "Young" Retirees and Soon to Bes Are Likely to:

- Have multiple interests
- Be wealthier and healthier than their predecessors
- Be part of the "young old" today, but maybe without a plan for the "old old" stage
- Look at retirement as a beginning, not an ending; a transition not a destination
- Be interested in meaningful community service or "work in the public interest"

It's becoming clear that people aren't over the hill at 50 anymore . . . Smart marketers will capitalize on this knowledge and create the image of an ageless society where people define themselves more by the activities they're involved in than by their age.

— Maddy Dychtwald

American Demographics, April 2003

In recent years, study after study has shown that attitudes about retirement are changing markedly. The stereotypes of rocking chairs on porches and shuffleboard courts in "adult" communities have been giving way to expectations for second careers and the pursuit of long-held dreams. However, this ongoing shift from retirement as a well-deserved rest in the "golden years" to a new period of opportunity is just one more chapter in our collective social history.

Before Social Security began in 1935, there had been little question about retiring. With no "safety net" for their elder years, Americans had few options except to work as long as possible and then rely on family members for assistance in old age. In fact, this Depression-era initiative was as much about freeing up jobs for younger people as it was about taking care of our elders. Social Security for the first time offered those in their 60s (a relatively advanced age in the 1930s) the financial freedom to enjoy a looked-forward-to, albeit short, time of leisure. The idea of retirement as R&R, however, did not always work well in its application. Many people lost their connections to accomplishment and family when they retired and found little to fill the void left by not having work to do.

The opening of Del Webb's Sun City in 1960 heralded a revolutionary shift in outlook. Retirement was redefined as "an active new way of life" that offered people novel ways to stay busy and enjoy their elder years.

This evolution in outlook continues among many of today's recently retired or soon-to-be retired residents. They are thinking about staying in the labor force or starting down completely different paths. As *Newsweek* has reported, "Demographers anticipate the boomer generation will rewrite what it means to be a senior citizen. They'll take tai chi classes in their 90s, start second careers in their 60s, and begin romances that will bring frowns to the foreheads of their grandkids."⁵

Or, as pollster Peter Hart notes in his report on a July 2002 poll of Americans 50-75 years old, many will want to be of substantial and meaningful service. "Volunteerism is about something much more substantial and real than taking up time in their day. Civic engagement is about filling a need to both make a difference and be involved. This attitude about volunteering is part of a new approach to retirement."⁶

As Hart sees it, community service — some would call it civic engagement — is a "new priority for retirement" among Americans. His eight key findings provide a window on the thinking of Americans who are at the right stage for Life Options.

1. **Older Americans see these as tough times.** More respondents than in a similar survey in 1999 saw today as “not such good times.”
2. **The tough times motivate volunteerism.** More than half have spent some time in the past three years volunteering, and a quarter spend at least five hours a week.
3. **Increased volunteerism is part of a new way to look at retirement.** Retirement is increasingly a new chapter in life and that means looking for significant ways to spend time. Service offers a way to fulfill personal needs, while doing something valuable for others. Compared to the 1999 study, nine percent more respondents said they consider volunteering an important part of their retirement plans.
4. **Volunteerism fills important needs for older Americans.** Those who volunteer now credit their service with helping them to feel vital, active, and part of a group with an important purpose.
5. **Volunteers tend to have healthier attitudes.** Research shows that positive outlooks make a difference in aging. Volunteers say they feel more optimistic and productive than those who do not.
6. **Organizations do a good job of providing opportunities for community involvement.** Those surveyed say the activities available to them use their skills and give them a sense of satisfaction.
7. **Room remains for the government to do more.** The older volunteer force could double if small incentives were offered.
8. **Prescription-drug benefits top the list of incentives to volunteer.** Although many say they would volunteer without any compensation, access to drug benefits was the most attractive incentive for those in the survey.⁷

The survey results underscore what other recent research has shown: “People want to be productive, they want intellectual stimulation, they want something significant to do, and they want to be physically active.”⁸ Volunteerism satisfies these needs during this new chapter of life.

Retirement today is being dramatically redrawn as another stage of life with many exciting, different choices. It is much less about age and much more about how individuals choose what they want to do and accomplish for the next quarter century or so. Think about it. Retirement, for many, will last longer than many Americans spent in school or actively raising a family. For most, only their working years will outnumber their retirement years. Considering how big the numbers are and the depth of society’s needs, this recasting of retirement as another stage of activity rather than a rest is good news for communities.



**Life Options
Exerciser**

Write down 10 words that describe your personal outlook on retirement today.

Can't Afford to Lose Them

Big Numbers

“Life expectancy at the time of the Roman Empire was about 28 years ... from the birth of Christ to 1900, each year of history saw an average gain of three days in life expectancy. Every year since 1900, however, has seen a gain of 110 days in average life expectancy.”⁹ Men and women now routinely expect to live into their 80s. Advances in health care and technology will continue to extend the years and the quality of life for millions of seniors.

Not surprisingly, today's older Americans and those approaching “elderhood” represent a substantial portion of the population, the workforce, and our public and private leadership. “In 2000, this group (over 65) included 35 million people, about 12 percent of the population. By 2025, as Baby Boomers age and life expectancy continues to increase, the number of seniors will double, to more than 70 million people. To put this in perspective, the U.S. will have twice as many seniors in 2025 as it has



Life Options Exerciser

Think about someone outside of your immediate family who is newly retired or about to retire. How would you describe them? What are they looking forward to? If you were retiring, what would you be planning?

Table 1. Life Options Could Apply to Millions of Americans

Ages	2000	2025	% Difference
50-54	17,585,548	19,318,000	9.9
55-59	13,469,237	18,452,000	37.0
60-64	10,805,447	18,853,000	74.5
65-69	9,533,545	19,844,000	108.1
70-74	8,857,441	17,848,000	101.8

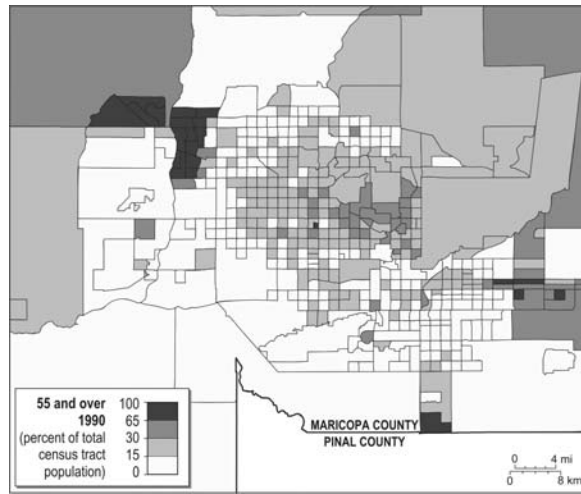
Source: *Mapinfo and American Demographics*, April 2003.

African Americans today.”¹⁰

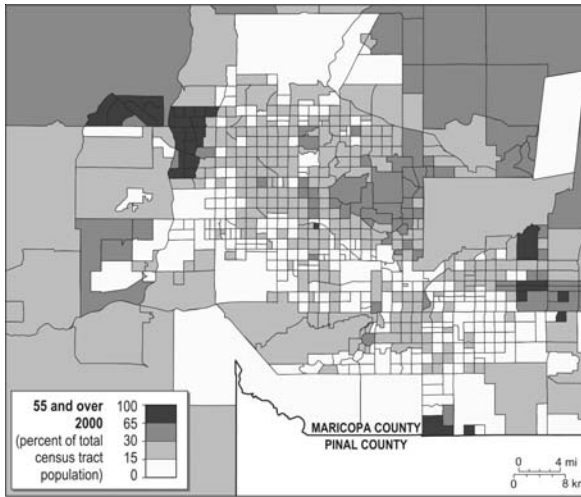
One in four Arizonans is a boomer, so aging makes a difference right here at home. The state's over-60 set represented 17 percent of the population in 2000. However, that proportion will swell to 24 percent in 2020 and 26 percent in 2050. The number of Arizonans 65 and over will be roughly comparable to the number of children under age 17 in less than 30 years.¹¹ In metropolitan Phoenix, recent growth shows some particular patterns for elders. (See Figure 2.)

Figure 2. Population Growth and Aging Combine to Give Metro Phoenix Distinct Patterns

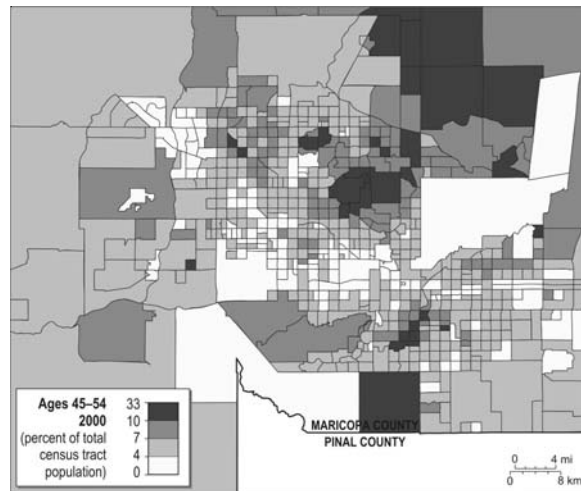
Residents 55+ in 1990



Residents 55+ in 2000



45-54 Year Olds and the Future Distribution of Elders



Source: *Choices for Another Age*, Maricopa County Commission on Productive Aging.

Needy Communities

Beyond the numbers a scan of the next retirees' "generational resume" gives an idea of the extent to which valuable skills and talents will be lost if communities do not act to retain or recapture the time and attention of their soon-to-be-retired citizens. Today academic, political, and business leaders are talking about "talent" as one of the most important facets of economic growth. This concept applies equally well to community revitalization and civic life. Whether it is matching mentors with school children, providing health care for homeless people, building homes for low-income families, or teaching music to children without access to the arts, no community is without work that its citizens think needs to be done and that can be completed through the brainpower of experienced older residents.

Wanting to Work or Something Like It

Work, despite our love-hate relationship with it, supplies much of our sense of identity and the relationships and networks that retirees often say they miss. In a statewide survey of Arizonans ages 40-59 completed in 2000, about half of the respondents reported that they intend to keep working beyond the age of Social Security eligibility. This finding is in line with national research that points toward work (or something that feels like it) as an activity that will continue to be important for the next elders. While the Hart survey reveals that a quarter of older Americans say they must work to make ends meet, others expect to seek employment for other reasons.

This attachment to work is important because it shows the extent to which soon-to-be elders want to remain engaged in important activities and their continuing willingness to make substantial, ongoing commitments. Cornell University professor Phyllis Moen has shown that formal volunteering — something that resembles employment because it is regular, meaningful, and intentioned — provides not just the routine and order people seek, but also the identity and social networks they desire.

Redefining senior volunteering as "working for the city" or "work in the public interest" could help boost the image of service and, at the same time, improve the places where our most seasoned talent wants to invest its time.

Insufficient Assistance for Personal Transitions

In the U.S. today, no institution exists to assist older adults make the transition to a life stage that may last as long as three decades. Professionals increasingly report that people in their 40s, 50s, and 60s have no idea how to choose or plan for a time that is not defined by work. While information on options may be common, the sheer volume of choices can be overwhelming. In addition, knowing something is available is different than being able to plan for it and act on it.

Retirement planning today is almost completely about dollars and cents. While financial well-being is certainly critical, it does not address what people want to *accomplish* with their time and talents. Civic Ventures' research has shown that older adults are seeking help with navigating a new phase of life. The types of questions they are asking reveal a need for assistance in identifying options, acting on them, and connecting with others. From discussions with older adults coast to coast, Civic Ventures has identified four major needs and desires among older Americans that cut across all income categories, educational levels, and races or ethnicities.

People Are Seeking...

1. Opportunities to consider and plan the next stage of life, particularly among those 55+
2. Opportunities to retool skills, obtain new training, or pursue educational interests
3. Flexible work or service opportunities that use their skills and experience in meaningful ways
4. Opportunities for connections to others of their age and throughout the community

Filling these needs in the context of community needs is at the heart of Life Options.

Communities Need to Transition Too

Today about half of older Americans say they volunteer regularly. And Peter Hart's 2002 survey showed that many current volunteers feel that most organizations have done a pretty good job of accommodating them. However, many observers of the nonprofit landscape have said that the "envelope stuffing" image of volunteers remains all too strong and prevalent. Established organizations may not yet be ready to accept the newly retired executive in a community "job," or make volunteer service possible for the person who cannot afford transportation to a central office. The good news is that the Life Options Initiative offers organizations and communities the opportunity to look at themselves and adapt to a new breed of customer.

Life Options Could Fit in Many Community Places

Of course, numerous community-based organizations and educational institutions already serve middle-aged adults and seniors. Adult education projects, senior centers, community colleges, religious institutions, public libraries, community centers, and intergenerational programs have all entered the aging arena, and some are deeply rooted in their communities. With the attention given to the aging of the "me generation," many organizations have already begun to consider how they must change to work effectively with the next agers.



Life Options Exerciser

What does meaningful service mean to you?
Are you currently engaged in such service?
What specifically makes it meaningful?



**Life Options
Exerciser**

How do the Life Options ideas relate to your outlooks on age? Do you start from a position of “possibilities” or “lack”? Will your perspective need to change before bold steps can be taken?

However, an issue for many institutions is that their programs – valuable as they are – have been defined by clients’ frailty, rather than health. They have focused on services to those in need, rather than choices for those who could help others. They have restricted their work to low-income elders, rather than anyone in the community.

Senior centers, for example, (44 in Maricopa County alone) originated to support older adults who needed meals, socialization, and access to social services. Federal funding in the 1960s expanded senior centers’ reach substantially. However at that time as many as 30 percent of seniors were poor. Today, the figure is less than 10 percent. With the “oldest old” the fastest-growing portion of our population, the number of low-income, frail, ill seniors will continue to grow and require support services. However the vast majority of aging Americans will not need that type of help for many years, if at all.

What Americans say they want instead are places and programs that encourage them to remain healthy, active contributors to their communities. In response, Life Options looks both to support and engage older residents who are a long way from needing traditional services, and indeed, want choices for using their experience and talents in novel, beneficial ways.

Senior centers, public libraries, community centers, and community colleges have particular opportunities now to gain from and give to an effort such as Life Options. By reframing their programs to view elders as healthy contributors with many assets, the existing organizations will adapt to a very different service environment. By bringing their substantial resources and experience to a Life Options Center, these treasured local institutions will touch a new generation of residents.

So, given the background on aging and retirement, where will Life Options take root and become a reality for individuals and institutions? The answer, really, is in any place that faithfully implements a dramatically different model for older residents and emphasizes choices, transitions, and service.



Part II

What Defines a Life Options Center?

When it comes to older Americans and the soon-to-be retired, the time is right for dramatic changes in institutions, expectations, and activities. So, now the exciting work of turning great ideas into concrete, innovative places and programs begins.

As the old adage says, if you don't know where you're going, any road will get you there. Fortunately the Life Options' destination is clear, and a great deal of thought has already gone into the road map. Its main signposts – the following Guiding Principles and Core Components – resulted from substantial research, analysis, and discussion. This straightforward, usable framework provides the direction you will need to get started on planning for Life Options in your community.

Life Options Fundamentals: Guiding Principles and Core Components

According to Civic Ventures and Libraries for the Future:

Life Options Initiatives encourage the development of destinations and approaches that assist older adults make the transition to a new stage of life characterized by individual and social renewal. The Life Options Initiative builds on the knowledge that access to meaningful and self-directed choices for work, service, lifelong learning, and community connections play an important role in the health and ongoing development of older adults. Life Options Centers and programs leverage organizational resources to create a common ground, learning resources, and access to information for transitions that link people in their middle and older years to the life of the community and its needs.

Life Options Initiatives understand how aging and attitudes toward retirement are changing and operate from a base of older adults as:

- Active, healthy, and ready to learn
- Highly diverse in their interests and skills
- Interested in meaningful community engagement

Think Life Options — Think:

- Transitions
- Renewal
- Interaction
- Conversation
- Engagement
- Choices
- Leveraging
- Partnerships
- Linking people to community needs
- Comprehensive
- Energy, action, comfort
- Accessible
- Accommodating
- Everything in one place

A Life Options Center on the Way

Central Florida Community College — Ocala, Florida Central Florida Community College plans to launch a Life Options Center late in 2003. The center will include a personal life-planning tool that focuses on: Significant Service, Choice Careers, Lifelong Learning, Wellness, and Friends and Fun. Volunteer facilitators will help participants find community resources through their own networks and via the Internet. A certified coach will oversee the work of the volunteers. For those who want more, the college provides in-depth assessment services, a self-paced learning lab, wellness opportunities, and courses to move people toward their personal goals.

The organizations and communities involved in Life Options Centers work together to:

- Take advantage of older adults as resources
- Accommodate the needs and interests of older adults for independence, flexibility, and meaningful engagement
- Form innovative community partnerships and collaborative efforts
- Involve older adults as leaders to plan and implement programs and services
- Use the best-available technologies to promote productive aging and social change

Life Options Initiatives recognize the fundamental importance of building programs and services that are accessible, culturally sensitive, and connected to the larger community.¹²

How do these ideas become a Life Options Center? The answer is by implementing a combination of the five core components shown in Table 2. Without these, there may be some valuable activities, but it won't be a Life Options Center. The potential power of this concept comes from the combination — or the whole is greater than the sum of its parts.

Table 2. Life Options Core Components and Optional Programs Make for a Nontraditional Mix

Life Options Core Components

- **Life Planning Programs**
- **A Gateway and Venue for Civic Engagement**
- **Lifelong Learning for New Careers and Enrichment**
- **Spaces and Programs that Promote Social Connections and Foster a Community for All Ages**
- **Information and Assistance with Resource Navigation**

Life Options Optional Programs

- Leadership Development
- Employment and Careers
- Computer and Information Literacy
- Health and Fitness
- Caregiving
- Financial Planning
- Relationships
- Spirituality

As you can see, Life Options encompasses:

Ideas	About older adults as assets, plus a deeply felt philosophy of choices, transitions, and service
Programs	Planned by and for older adults on many topics, with many choices, and with significant service as an outcome
Places	Comfortable and homey, but with the latest in technology
Ways of Working	Starting from a positive position of strength and health, with new audiences, new outlooks, and new images

This combination of components and assumptions results in a comprehensive, one-stop resource where midlife and older adults can — using the best tools community collaborators can provide — explore their Life Options.

This multifaceted mix, under one roof or in a single virtual place, sets Life Options apart from other efforts for elders and underscores why quality design is viewed as such a priority. With this framework, there are countless ways to create a Life Options Center, although as yet no institution has done so. And no one organization will be able to do everything required for a full Life Options Center. Partnerships will be crucial for creating the complete package.

However, achieving together and working differently are often easier said than done. For Life Options to be successful, all stakeholders will have to stand ready and willing to:

- Keep the focus on the future for users and partners
- Develop a common vision
- Involve potential users in significant roles
- Engage collaborators beyond the “usual suspects”
- Go for the bold statement, the bright contrast...the big ideas

Interaction Plus Engagement

Life Options Initiatives require seeing older residents as significant players in improving communities. Indeed, the emphasis on civic engagement is one of the features that differentiates Life Options from past efforts for seniors. But for many, civic engagement and its frequent companion “social capital” remain fuzzy concepts in need of definition.

I get by with a little help
from my friends.

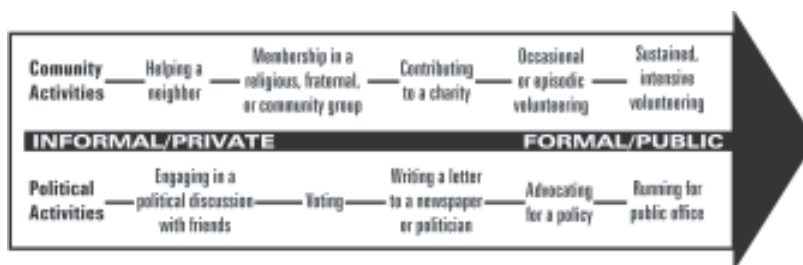
— Joe Cocker

It is good to have an end to journey toward, but it is the journey that matters in the end.
 — Ursula K. LeGuin

A simple definition of civic engagement comes from higher education institutions that are working among youth. Campus Compact, for example, says that civic engagement is “the interactions of citizens with their society and their government.”¹³ Scholar Robert Putnam defined “social capital” in his landmark work ***Bowling Alone: The Collapse and Revival of American Community*** as “social networks and the norms of reciprocity and trustworthiness that arise from them. It is civic engagement among citizens that creates social capital.” The more social capital in a community, the more readily communities will be able to address local issues and improve residents’ well-being.

As Figure 3 shows, civic engagement generally relates to community and political activities and ranges on a continuum from very informal acts of helping to long-term, intensive volunteering. As researchers and scholars work to understand more about the whys and wherefores of community life, Life Options can spread the word about the many possibilities for civic engagement.

Figure 3. The Continuum of Civic Engagement



Source: Civic Ventures, Adapted from David Crowley, Social Capital, Inc.

Core Life Options Components

Five types of programs are envisioned in a Life Options Center. Each is described briefly below and illustrated with existing programs that reflect an aspect of the Life Options approach. The examples are intended to showcase a variety of types of organizations and ideas. Thus, you will see national efforts side-by-side with small-scale local activities. Some examples describe sweeping initiatives, while others focus on narrow purposes. All of the projects function at different levels and are at various stages of development, but each one provides some food for thought. In addition, the following component descriptions include a list of potential partners.

It is worth emphasizing that the Life Options approach continues to be a work in progress. Complete Life Options models do not exist at this time, although many organizations are in the planning stages. The examples offer

one piece or another of the approach, but we will have to wait to see fully developed Life Options Centers. With the number of development efforts underway, several full models should emerge over the next year or so.

Life Planning Programs

Life Planning is not a “one-time event” since it goes far beyond traditional career and retirement planning efforts. As Boston-based career coach and author Margaret Newhouse describes it, Life Planning defines “how you want to live, what you want to do and be in the different arenas of life...The canvas is much broader, with paid and unpaid work or leisure being only part of the picture.”¹⁴

Life planning started in the private sector as a process to assist employees with the transition to retirement. Now the public and nonprofit sectors have embraced the idea as well. Life planning programs feature counselors, seminars, and other events and resources to help people, whether or not they already have a passion for something, create a plan for the future and locate the resources they need.

Professional life coaches and career counselors have recognized the changes in individuals’ needs and preferences in the middle and older years and, as a result, are increasingly including Life Planning ideas in their work. In 2002, a group of New England-based professionals formed the Life Options Planning Network to work together on developing the field and creating new Life Options tools. This type of resource would be worth looking for in your community along with the other potential partners.

Table 3. Primary Life Planning Activities

Component	Major Questions
Assessing — Looking Inward	<ul style="list-style-type: none"> • Who am I now? • What do I want to leave behind? • What are my strengths, passions, and purpose?
Visioning — Discovering and Exploring Possibilities	<ul style="list-style-type: none"> • What is available in familiar and unfamiliar areas and places? • What can I create that fits me? • What is the right mix of such options as work, service, learning, family, and leisure?
Making Choices — Setting and Implementing Goals	<ul style="list-style-type: none"> • How do I turn my dreams into goals? • What assets and barriers do I have? • How will I make the goals happen?

Source: *Making the Most of the Rest of Your Life*.

It's time to nurture a changed culture that supports elongated lives in much more creative, thoughtful, and respectful ways.

— *Aging in the 21st Century*, Stanford University

Potential Partners for Life Planning Programs

- Career and life counselors and coaches
- College and university career counseling centers
- Chapters of human resources professional associations
- Corporate work–life professionals
- Financial planners
- Pre-retirement planners
- Groups of retirees such as guidance counselors, social workers, or psychologists

Life Planning Examples

New Directions — Boston, Massachusetts

www.newdirections.com

The Portfolio Program is aimed at senior executives and professionals who are leaving traditional jobs for lifestyles that balance work, retirement, continuing education, service opportunities, and recreation. The program helps participants to reexamine values and then balance schedules and income needs with family, leisure, learning, and humanitarian interests. Participant fees and dollars from public and private sponsors support New Directions, a firm which also assists clients who are seeking reentry into full-time work.

Newton Free Library — Newton, Massachusetts

www.ci.newton.ma.us/Library/default.htm

Newton's public library hosts a series of forums that have been organized by a community initiative called "Discovering What's Next" led by members of the Massachusetts Coming of Age Coalition. These forums have focused on "Exploring Your Options in Retirement," "Can I Really Afford to Retire," "Working in Retirement," and "Resiliency in the Face of Life Changes: The Mind/Body Connection." The forums have been successful in bringing older community members together to learn and share their experiences.

Newton Community Education Program — Newton, Massachusetts

www.newtoncommunityed.org

In collaboration with "Discovering What's Next," Newton Community Education offers special event workshops targeting the life planning issues of older adults. These workshops include: "Passion and Purpose: Creating a Road Map for the Rest of Your Life Seminars®." Created by a career and life coach, this in-depth opportunity for personal planning often leads participants to include service in their new plans. The special events are complemented by assistance in such traditional areas as financial planning for retirement. The community education program is part of Newton Public Schools.

A Gateway and Venue for Civic Engagement

Every community has opportunities for service. However, individuals often report difficulties either navigating through the myriad of options or being mismatched with what they find. The Life Options Center, through sophisticated referral and matching activities or the operation of specific programs (such as Life Planning), will make it easy to link skills with community needs and help individuals give back to their communities. The words “gateway” and “venue” offer the Life Options planner a myriad of new ways to approach significant paid and unpaid service. From being a broker of specific opportunities to planning events which could assess needs that Life Options users could fill, the service gateway could have a long reach and definite influence.

Potential Partners for Service and Civic Engagement

- Civic leadership programs such as Valley Leadership in metro Phoenix
- RSVP, Senior Companions, Foster Grandparents
- Americorps, VISTA, Teach for America
- Experience Corps
- SeniorNet Learning Centers
- AARP
- Church-sponsored programs
- Intergenerational networks
- College and university nonprofit management programs
- Service learning programs
- Volunteer action centers
- Civic organizations

Gateway and Venue for Civic Engagement Examples

Temple University Center for Intergenerational Learning

www.temple.edu/cil/

Since 1979, the Center for Intergenerational Learning has created model programs, provided training and technical assistance, carried out research and evaluation, and published valuable materials. With programs such as Full Circle Theatre, Experience Corps, Across Ages, HomeFriends, and others, the center provides the means for people of all ages to tackle big problems and make a difference in their communities. For those wanting to increase civic engagement, the center has much to offer in terms of ideas, materials, and experience.

The commission process focused on the tactics we, and others, need to keep revisiting: the power of partnerships, the value of elders, the importance of place.

— Commission on Productive Aging Member

Imagine what a harmonious world it could be if every single person, both young and old shared a little of what he is good at doing.

— Quincy Jones

Experience Corps — Washington, D.C.

www.experiencecorps.org

With programs in Baltimore, Boston, Cleveland, Durham, Indianapolis, Kansas City, Minneapolis, New York, Philadelphia, Phoenix, Portland, southeastern Texas, and San Francisco, Experience Corps places older adult volunteers in schools and youth organizations in their communities. These volunteers work one-on-one with young children, create before- and after-school programs, get parents more fully involved in schools, and serve as advocates for children and their needs in the larger community. State and federal funds and private sources support Experience Corps.

Bay Area Literacy — San Francisco, California

www.volunteerinfo.org/balit.htm

Local libraries involve seniors in tutoring programs. This site contains links to the participating library web sites throughout the San Francisco Bay Area. The library-based adult literacy programs listed enabled over 200,000 adults to improve their skills so that they could reach a number of other personal goals.

Lifelong Learning for New Careers and Enrichment

Older adults and soon-to-be retired individuals often say that they most look forward to having time to learn something new. Certainly, lifelong learning opportunities, whether for another job or to satisfy an interest, appear to be the most prevalent of current programs for older residents. Countless options exist in community colleges, libraries, universities, nonprofit programs, and much more.

However, the point is not simply to put elders back in the classroom. The learning opportunities most relevant to Life Options are those that focus on exploration, hands-on experiences, and connection to the community. In other words, traditional courses should be complemented by information sessions, self-paced online learning, or experiential learning outside of the Life Options center. To respond to the appeal and convenience of one-stop access, educational offerings will have to come to the customer, not the other way around. Partnerships will be important to provide a wide range of educational resources.

Employers have voiced concerns about an aging nation for fear of not having sufficient skilled workers. With a shrinking pool of new labor force entrants, experienced workers may find new opportunities in their current career fields or new ones. How to maintain career momentum, retool for a second, or third career, or navigate temporary work, consulting, and starting a business may be important Life Options services.

Whether the different career path is one that requires a degree (such as for teaching) or a technical certificate (such as for a computer support position)

or simply a revised resume, job seekers will require assistance from those who know the local labor market well and are adept at matching desires with training programs in many settings. Job training may have to be more formal than other types of learning.

Potential Partners for Enrichment Learning

- Institutes for Learning in Retirement at colleges and universities
- Adult education centers
- College and university Extended Education departments
- Community education programs sponsored by municipal parks and recreation departments
- Senior centers
- Public libraries
- Alumni associations
- Retirement community activities programs
- Hospital-sponsored wellness programs
- Faith-based programs

Potential Partners for Employment Learning

- Corporate human resources programs
- Work/family companies, such as LifeCare, Working Solutions, Work/Family Directions
- Community college certificate and training programs
- Outplacement firms
- Private career counseling/life coaching professionals
- Pre-retirement counselors
- Workforce Investment Boards

Lifelong Learning Examples

North Carolina Center for Creative Retirement – Asheville, North Carolina

www.unca.edu/ncccr

The North Carolina Center for Creative Retirement provides workshops, seminars, and retreats that involve older adults in lifelong learning, personal enrichment, community service, and intergenerational activities. The publication *Shifting Gears in the Second Half of Life* is designed to help groups begin learning circles. The University of North Carolina at Asheville sponsors the Center for Creative Retirement. The Center for Creative Retirement is a member of the Elderhostel Institute Network also.

How old would you be if
you didn't know how
old you are?

— Satchel Paige

Allegheny County Library Association — Pittsburgh, Pennsylvania

www.acla.org

The Allegheny County Library Association has organized partnerships to expand the educational options for older adults served by 17 library branches. Through the “Third Age Learning Community” the University of Pittsburgh brings university-level classes to local libraries. The noncredit sessions range from day-long events to a series of three to four classes. The “Senior Center Library Connection” works with 15 Pittsburgh-area senior resource centers to offer book discussion groups that are held alternative months at the centers and libraries. Participants choose the books to be featured. With the “Elderhostel Conversation Salons” residents have a local Elderhostel experience. The facilitator-led monthly discussions among approximately 12 people focus on current events and issues. The library association and Highmark sponsor the monthly Highmark-PALS bookclub for those over 65. “One Book, One Community” in which residents read and discuss the same book at the same time has also worked well to engage older adults in learning and libraries.

Troops to Teachers — Nationwide

www.proudtoserveagain.com

Troops to Teachers recruits military personnel (especially those retiring) to new careers as teachers in public schools serving low-income students. The program focuses especially on preparing teachers for math, science, and special education. State placement offices assist applicants with certification requirements and employment leads. The web site provides a job referral system plus links to state Departments of Education and state certification offices, examples of model resumes, and other job listing sites in public education. The *No Child Left Behind Act* will fund this program through 2006.

Senior Environmental Employment Program — Washington, D.C.

www.epa.gov/ohros/see/brochure

This Environmental Protection Agency program draws upon the skills of retired and unemployed seniors interested in helping improve the natural environment. Participants assist federal, state, and local programs with pollution prevention and reduction. SEE workers are involved in a variety of assignments ranging from clerical work to technical positions to writing and research to accounting in 10 regional EPA offices throughout the country. EPA funds six national aging organizations to administer the program.

Operation ABLE — Southfield, Michigan

www.operationable.org

Operation ABLE (Ability Based on Long Experience) is a private, nonprofit organization that provides employment resources for mid-career and older job seekers. Services provided by Operation ABLE include job placement assistance, computer and other skills training, job fairs, advocacy, and collaboration with public agencies and the business community. Operation ABLE has affiliates in Boston, Chicago, Los Angeles, Michigan, Nebraska, Vermont and Washington, D.C. Individuals, corporations, foundations, and public agencies provide financial support.

Spaces and Programs that Promote Social Connections and Foster a Community for All Ages

Life Options initiatives are anything but the “same old same old.” One of the reasons why is that Life Options activities focus as much on creating inviting, productive public spaces for all ages as on the services and connections that cater to older adults. The face-to-face interaction that occurs when people convene in an actual place is critical to the social dimension of the Life Options approach. More than just intergenerational activities, Life Options Centers should ask: How can we integrate ages and strengthen our community bonds?

A dedicated space that is attractive, active, pleasant, and vital should create a space where older residents can connect with each other and people of other ages. They will be the kinds of places where people would naturally gravitate.

In his book, *The Great Good Place*, Ray Oldenburg describes the spaces that would provide a model for Life Options.

Ray Oldenburg’s Characteristics of the “Third Place”

- **Exists on Neutral Ground** — Where individuals may come and go as they please. No one is required to play host. All feel at home and comfortable.
- **Is a Social “Leveler”** — No formal criteria of membership. Inclusive. A sense of social equality. Personality, not class or station in life, is what counts.
- **Conversation is the Primary Activity** — Talk is lively, scintillating, colorful and engaging. Wit and humor reign.
- **Is Accessible and Accommodating** — One may go along at almost any time of the day or evening with assurance that acquaintances will be there. A community life exists. Hours are accessible during both the on and off hours of the day.
- **Character is Determined by the “Regulars”** — Set the tone of conviviality. Regulars’ mood and manner provide the contagious style of interaction. Newcomers are accepted and initiated into the group life.
- **Maintains a Low Profile** — Plain and unpretentious, encourages “dropping in” as part of a daily routine.
- **The Mood is Playful** — Joy and acceptance reign over anxiety and alienation. Psychological comfort and support are extended.
- **Is a Home Away from Home** — Offers a congenial environment where one expects to see familiar faces, and absences are quickly noted. A place where individuals are regenerated and restored. Warmth abounds.

Source: *The Great Good Place*, 1999.

I have become more aware of the value of a sense of place and realize that a special area that appeals to a specific age group, with services and surroundings tailored to their needs, is very important.

— Commission on
Productive Aging
Member

A place for meeting and greeting, for working together on issues of interest, for learning new skills...

— *Commission on
Productive Aging
Member*

Social and Community Connections Examples

Mather Café Plus — Chicago, Illinois

www.matherlifeways.com/

Mather Café Plus combines a restaurant, gathering place, and educational center under one roof. The three Chicago-area locations of Mather Cafes primarily serve active, independent older adults. Programs and classes supplement the restaurant and are offered in areas such as exercise, computers, and art. Day trips, monthly parties, and community events encourage new relationships and social interaction. Social workers and health care professionals provide individual consultations and referrals. Connections with other senior groups and health care providers ensure strong support networks for those involved. The Mather Cafes are part of the Mather Lifeways Foundation.

Connecticut Life Options Libraries Project — Hartford and New Haven, Connecticut

www.lff.org

This Life Options project connects children and older adults with education and libraries. The effort improves the educational environment for young children in two cities by strengthening the capacities of public libraries to tap the experience and skills of the state's growing population of older adults. The intergenerational pilot projects will test the potential of library-based programming that links the skills of older adults with at-risk children. The library also will convene community dialogues to explore all of the possibilities for connections between seniors and children. A statewide forum for policy makers, service providers, educators, and library professionals will follow the pilot phase. Life Options Libraries will train librarians on emerging best practices also.

Information and Assistance with Resource Navigation

Communities are complex, multifaceted places, and individuals' desires and needs are just as complicated. Far from being obsolete in today's technological age, information services and help with finding and using the needed resources remain vital, valuable sources of assistance.

Residents planning for retirement or seeking meaningful civic and service opportunities need reliable information and help in matching their skills to local needs. Life Options Centers will involve substantial assistance with and access to information. Some initiatives will include development of a clearinghouse of community service opportunities. Others may create community-wide inventories of older adults' skills and resources. Others may partner with a volunteer center for information. Whatever the strategy, public libraries will play important roles as partners in Life Options Centers, drawing on their traditional expertise in community information and referral.

With the Life Options emphasis on technology Centers may choose peer-led training in technology along with cutting-edge information resources.

Potential Partners for Information Resources

- Public libraries
- Community information and referral organizations
- Local online networks
- Associations of nonprofit managers
- Web-based information firms

Information and Resource Examples

Langeloth Convalescent Education and Information Center, Crandall Public Library – Glens Falls, New York

www.crandalllibrary.org/medical/about.asp

Crandall Public Library's healthcare resources are extensive with books, medical texts, health newsletters, videos, online databases, and patient handouts as well as a professional medical librarian on staff. Frequent programs help to communicate on many health issues. The service is free of charge. Glens Falls Hospital provides funds for the project.

SeniorNet – U.S., Japan, and Sweden

www.seniornet.org/php

SeniorNet is an international, nonprofit organization that provides older adults with access to computer technology and skills. SeniorNet publishes instructional materials, operates more than 200 Learning Centers nationwide, provides resources and courses online, holds regional conferences, and collaborates in research on older adults and technology. Senior instructors and coaches teach computer classes to their peers. Members pay tuition fees to support the services.

Multnomah County Library Cyber Seniors – Portland, Oregon

www.multcolib.org/seniors

Multnomah County Library Cyber Seniors trains older Portland-area residents to use computers comfortably, with a focus on library resources. Training sessions include email, using the online library catalog, and searching the Internet. In addition to the in-person session at the library, two online tutorials, Computer Basics and Internet Basics, are available. The site also includes a class schedule, and registration information, and other links of interest to seniors.

Wilton Library Association Senior Center – Wilton, Connecticut

www.wiltonlibrary.org/senior

The "Seniors Enter Here" link on the library's home page is an obvious invitation to the Life Options audience. The Local Resources portion describes all of the library resources for seniors and provides the latest issue of *Corridors*, the Wilton Senior Center magazine. Other pages provide information on retirement living, health and fitness, financial and legal concerns, and more and provide links to other credible web sites and resources for seniors. Wilton Library sponsors this service.

Optional Programs, Services, and Information

Of course, many other types of offerings would complement the five core programs. The following areas are examples of fields that could enhance any Life Options Center. What optional offerings a Life Options Center pursues will depend on the preferences of its community users.

Leadership Development

Some adults may never have had an opportunity to learn to lead others. Leadership development efforts would especially complement the Gateway and Venue for Civic Engagement component.

Health and Fitness

Some experts say that fitness facilities and health programs may serve as “traffic builders” for Life Options Centers. At the very least, information and access to local programs will provide an important balance to center offerings. By working with local hospitals, fitness centers, or alternative health networks, Life Options may be able to offer different types of health programs.

Caregiving

Many of today’s boomers find themselves “sandwiched” between children and older parents, while older adults may be providing care for another senior. Services for caregivers and information on community resources could be an important component of a Life Options Center.

Financial Planning

Making decisions about money can be difficult for some or simply an issue residents want to know more about. As with health and fitness, financial planning may attract older adults and provide an introduction to Life Options programs.

Relationships

Relationships with family and friends can change over time. Some older residents will want to explore how to develop new or deeper relationships with others.

Spirituality

From meditation to building a particular faith, there are many ways of addressing spirituality and a growing interest in the area among all ages.

A Life Options Center clearly can take many forms and should reflect what its users want and need. A coherent planning process, as presented in Part III, will allow your initiative to take shape.



Part III

Planning a Life Options Center

Today and tomorrow's seniors are potential markets big enough to get anyone's attention. However as any advertiser worth their salt will tell you, today a "massive" market does not translate into a "mass" market, especially in relation to the people Life Options wants to reach. In other words, a plan for a Life Options Center, like any other product or service, must be tailored and targeted. Yet, it must also remain true to the mission and values of the sponsoring institutions.

This section will help you make the decisions that will result in the "accessible, culturally sensitive, and connected" services and programs which will resonate with "active, healthy, and ready to learn" older adults who are "interested in community engagement and highly diverse in their interests and skills."

Planning and Creativity Go Together

In recent years, planning has unfortunately acquired a passive image. For example, "planning to plan" is often a euphemism for inaction. Critics complain about wasting resources on planning products that just "sit on the shelf." At the same time, an initiative as different and far-reaching as Life Options will not get off the ground without thoughtful, inclusive planning. So, think of "planning" and "creating" at the same time. Your thoughts and actions will result in dynamic change and bring to life a noteworthy resource for your community.

To Plan: A scheme or program for making, doing, or arranging something.

To Create: To cause to come into existence; bring into being; make; originate; esp., to make or design (something requiring art, skill, invention, etc.)

Source: Webster's Third College Edition

The Life Options planning process includes five core strategies:

- Dare to Be Different: Creating Your Life Options Workplan
- Looking Outside and In: Identifying Needs and Assets
- Better Together: The Why and How of Collective Action
- Hitting Your Target: Reaching Your Audiences
- What Works, What Doesn't, and Why: Evaluation

Each of these is described below and illustrated with exercises.



Life Options Exerciser

Think about planning a terrific vacation. What excites you about that process? How can that same enthusiasm be applied to the Life Options process?

Dare to Be Different: Creating Your Life Options Workplan

As noted in Part II, a Life Options Initiative has a clear purpose and a burgeoning audience. And, to bring the ideas to their full potential for people and places, organizations will have to do things differently. Remember the caution about not simply putting a “new coat of paint” on traditional services? A Life Options Workplan should be as definite as you can be since it will push you to clarify your goals, define your objectives, and set you on a path of action! Realistically, however, Life Options must still be in tune with why your organization exists. Thinking through what you have now and what you want — in relation to your organization’s strategic goals and master plan — is a critical part of planning a Life Options Center.

Successful aging means the ability to maintain three key behaviors or characteristics:

- Low risk of disease
- High mental and physical function
- Active engagement with life

— *Successful Aging:*
The MacArthur
Foundation Study

Quick Planning Review

- **A goal is a change in behavior.** Example: Older adults will be mobilized for meaningful community service.
- **Objectives are a state of being.** Example: Community skill bank developed and maintained cooperatively by volunteer center, library, and university.
- **Assumptions are starting points to be tested.** Example: Seniors are unaware of meaningful service options.
- **Action steps answer What do I do first...and then ...and then?**
Example:
 - Inventory existing volunteer programs for older adults.
 - Survey community resident 40-55 years of age to learn about their outlooks on and knowledge of the community service.
 - Design and test two service choices.
- **Evaluation provides feedback for improvement on planning and service components.** Example: Documentation on what was done, what worked, and what didn’t is compared to what was planned and expected. Strategies for improvement are created.

Work Plan Template

GOAL:
STAKEHOLDERS:
PARTNERS:
Objective 1
 Assumption
 Action
 Action
Objective 2
 Assumption
 Action
 Action
Documentation
 Source
 Source

In Step with Stakeholders Too

A colleague’s story about how an assignment early in her career changed her outlook on who stakeholders are and how they should be involved is a good one in the context of Life Options. She was given an assignment to develop a new strategy for a very important public issue. She studied, researched, and wrote – by herself. Then, the new initiative was announced, but no one adopted it or even paid attention. Without a network of stakeholders with ownership, even the best work won’t make a difference. With Life Options, those stakeholders include midlife and older adults, service providers, businesses marketing to older adults, educators, policy makers, library professionals, and more. You will need to decide exactly who your stakeholders are, in addition to midlife and older adults, and involve them in your Life Options planning and implementation.

▣ Exercise: Your Life Options Stakeholders

Who are your stakeholders? How will you reach and involve them?

- _____
- _____
- _____

▣ Exercise: Life Options Alignment

Life Options is to assist older adults with choices and transitions and civic engagement. How is Life Options aligned with your institution’s goals and plan? How does this initiative fit into your institution’s master plan?

- _____
- _____
- _____

Looking Outside and In: Identifying Needs and Assets

A frequent customer of a specialty shop asked the owner if she enjoyed what the customer perceived as essentially shopping for herself in stocking the business. The owner replied that she would not be successful if she worked that way. She had to buy according to her customers’ tastes. Her broad experience and network of colleagues in similar businesses were touchstones and great assets, but customers’ needs and preferences dictated the majority of choices. This anecdote highlights the necessity of combining internal assets with a thorough understanding of external needs and desires, whether in Life Options or in business.

We need service opportunities that tap into intellectual capacities.
— Commission on Productive Aging Member

An external assessment – some might call it an environmental scan – would identify and analyze the gaps or needs in the community as well as the skills and experience of those the initiative would seek to serve. The external assessment can provide the start of a “skills bank” or clearinghouse of information on who is doing what in a community.

To carry out an external assessment, especially among target groups you may not be familiar with, identify the local leaders or organizations that are most knowledgeable. These experts are potential partners and can link you to what is happening in their community.

▣ **Exercise: Questions, Sources, and Strategies for Looking Outside**

Why is a Life Options initiative a good idea in your community?

•

What existing facilities, networks, attitudes, or traditions does your community have that could contribute to or encourage a Life Options initiative?

•

What do potential champions and users outside of your institution think about the idea?

•

What are the “hot” issues in your community? Do they relate in any way to Life Options?

•

The answers to these questions can come from such sources as demographic statistics and market research for products or services targeting older adults as well as from residents, organizational leaders, and elected officials or a systematic mapping and analysis of existing community resources. Tools such as focus groups, key informant interviews, surveys, meetings with advisory groups, and tours of various institutions would commonly be used to generate information. To get started, ask yourself:

- What information or tools do I have to answer these questions?
- What else do I need?

Looking Inside

Of course, the tangible and intangible resources your institution has (or expects to have) to work with such as money, people, or reputation will have a lot to do with how Life Options works out. The following exercise will help you understand the resources you have.

☐ Exercise: Life Options Assets Scorecard

On a scale of 1 to 10 where 1 is starting from scratch and 10 is everything you need, where does your organization stand on?

- _____ Staff already attuned to Life Options ideas with the skills needed to make it successful
- _____ Real or virtual facilities or spaces either ready for use or that can be redesigned for the initiative
- _____ Reputation or credibility for this type of initiative
- _____ Portions of Core Programs already in place
- _____ Total resources required for Life Options

At the conclusion of this portion of the process, you will have ideas for new partners, a start on a skills bank, a good understanding of your institution's strengths and what resources you will need. With this knowledge of where you stand, the next steps should be fairly clear. And as shown in the next component, the first priority is probably joining with others.

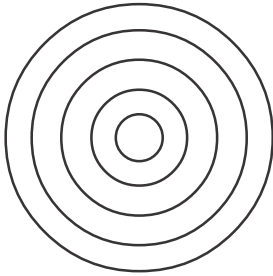
Better Together: The Why and How of Collective Action

Who would have thought that cooperation and collaboration would emerge as the best strategies for coping with competition? Why has working together become so important? The short answer is that very, very few institutions have all of the resources and know how needed to deal with the realities of both competition and today's complex issues. Because problems are multifaceted, solutions must be so as well.

As with the need for stakeholder involvement and the Life Options emphasis on community and connections, cooperation and collaboration stand out as the best ways to ensure success for this project. Being collaborative, however, demands time and depends on skills that many will have to learn. Be prepared to learn more yourself, and to guide others, through the dos and don'ts of working together.

Why Cooperate?	How to Cooperate
Efficiency	Participation
Depth	Commitment
Breadth	Vision
Credibility	Clarity
Perspective	Communication

Source: Libraries for the Future



▣ Exercise: The Meaning of Collaboration

What five words define the meaning of collaboration for you?

• _____

What do you and your institution need to do to become better at collaboration?

• _____

▣ Exercise: Circle of Friends

A series of circles provide a way of illustrating your institutions current, potential, and, at this point, unknown partners. Put the organizations most likely for your group to work with in the center circle. Continue until you get to completely new “friends” in the outer ring. You may not have a relationship with the groups on the outer ring. How will you create a meaningful one?

Hitting Your Target: Reaching Your Audiences

Behavior expert Richard Bandler has said, the “quality of your communication is the result you get.” If the ideal user is walking in the door (or logging on), if community leaders are talking about the value of Life Options, if an increasing number of partners is volunteering more resources, your marketing, communications, and public relations efforts must be hitting their marks and meeting your audiences’ and the community’s needs. If not ... it’s time to review.

Often organizations categorize a wide variety of strategies for reaching people under the term “outreach.” This is simply a subset of a comprehensive strategy that should feature:

- **Messages** – what you want to say and how you *need* to say it
- **Communication Vehicles** – the myriad of ways to “talk” to your audience in many situations
- **Public Relations** – building awareness of and an image for the project
- **Marketing** – making sure your audience is “buying” your products and services

There is no substitute for research with your stakeholders and target audience to get your communications and language right. Research has shown that services for “older Americans only” are not very attractive to older Americans. So, successful centers may want to stress creating a sense of being “connected to” and “valuable to” the community. This approach will contribute to creating an understanding of older adults as community assets, not burdens. Planners will need to determine how to refer to the target audience as well. “Seniors” is a positive term, for example, to some, and a negative label to others.

Many institutions fail to follow through on reasonable plans in this area. Long-term strategies and persistence in marketing, communications, and public relations will pay off especially if the efforts follow 10 tried-and-true guidelines.

10 Guidelines for Reaching Your Audiences

1. Plan WITH your audiences, not FOR them
2. Be clear about who you are trying to reach
3. Know where to reach your target group
4. Use appropriate language and style of communication
5. Devise “hooks” to communicate message
6. Listen hard and learn about community priorities
7. Communicate respect and sensitivity
8. Be creative and persistent
9. Don’t wait for people to come to you
10. Experiment continuously

Source: Libraries for the Future

☐ Exercise: The 10-Word Test

You’ve just met a local philanthropist who is a potential Life Options funder. How would you describe your Life Options initiative in 10 words or less?

- _____
- _____
- _____
- _____

What Works, What Doesn’t, and Why: Evaluation

Defining and tracking the progress, success, and failures of your Life Options initiative are critical to accomplishing your goals, making adjustments, and making the case about the project’s value to others. Funders, community partners, and policy makers will want to know what your Life Options initiative has accomplished and how you know what impact it has had on the community.

Many professionals view evaluation as mysterious and fearsome. On the contrary, strong evaluations provide reliable, “actionable” information by asking simple questions that relate directly to the Workplan. Feedback begins with: What do you want to know? Who will use the information? How will they use it?

Evaluations usually fall into one of three categories: Process, Outcomes, or Impact. For Life Options, you will most likely want to consider a combination of the three since you seek to know how things are proceeding as well as

I appreciate the contacts I was able to make with various agencies, organizations, and services that work with older adults in our community. I intend to seek them out for assistance in enhancing our services and resources to assist older adults.

— Commission on Productive Aging Member

Evaluation Types

Process: Focuses on program implementation and operations

Outcomes: Looks at what specifically happened to participants, as a result of the effort

Impact: Explores the long-term impacts and whether the project had the desired effect. Could the effects have happened without this program?

what people think, what has happened to them, and how the project carried out the Life Options principles.

To start the evaluation process, determine what you and your stakeholders must know and from the beginning make gathering relevant data part of everyone’s job. Then, consider other resources for information such as surveys, interviews, focus groups, and observations.

☐ Exercise: Need to Know – Want to Know

Describe what you need to know about your project’s effects and what would be nice to know. What tools best suit those questions?

Want to Know	Best Tools	Need to Know	Best Tools
•	•	•	•
•	•	•	•
•	•	•	•
•	•	•	•
•	•	•	•

By now, your Life Options Workplan has started to take shape and you will soon be ready to share your product with others. That does not mean that your planning phase has come to an end. Planning – aided by evaluation – must be a continual process to ensure that your Life Options Initiative becomes and remains successful by achieving the desired outcomes and goals.



Part IV

Must Read Print and Web Resources

This Life Options Blueprint is simply a starting point for planners and leaders. The following print and web resources offer more depth on the topics touched on in this guide and additional ideas for organizations and communities. This was created to provide just a taste of the best. Countless more resources are available.

Print Resources

Prime Time

Marc Freedman, 1999, Public Affairs

Prime Time was written as a response to America's narrow focus on the solvency of entitlement programs when it comes to issues of aging Americans. The book includes portraits and stories of people across the country serving as role models for how to use time, talents, and experience to strengthen their communities.

The New Face of Retirement: An Ongoing Survey of American Attitudes on Aging

Peter D Hart, 2002, Civic Ventures

This brief research paper reports on the findings of a survey about older Americans and volunteerism. The sample consisted of 600 Americans aged 50-75, 300 volunteers and 300 non-volunteers. The eight conclusions are: 1) Older Americans see these as tough times 2) The tough times motivate volunteerism 3) Increased volunteerism is part of a new way to look at retirement 4) Volunteerism fills important needs for older Americans 5) Volunteers tend to have healthier attitudes 6) Organizations do a good job of providing opportunities for community involvement 7) Room remains for the government to do more and 8) Prescription-drug benefits top the list of incentives to volunteer.

Candy Striper, My Ass!

Jason Tanz and Theodore Spencer, *Fortune*, Aug. 14, 2000

This article describes the culture clash between retiring high-powered executives and the genteel world of volunteers.

Successful Aging

John Rowe, and Robert Kahn, 1998, Pantheon Books

Based on the landmark 10-year MacArthur Foundation Study of Aging in America, this book explains what medicine knows about aging. Ways to affect the aging process are provided. For those new to aging issues, this book is a good place to start.

Also Check Out

Revisioning Retirement,
Survey of consumers by
AIG SunAmerica
[www.re-
visioningretirement.com](http://www.revisioningretirement.com)

Staying Ahead of the Curve,
AARP survey on work
and careers, 2002 [http://
research.aarp.org/econ/
multiwork.html](http://research.aarp.org/econ/multiwork.html)

Sites Worth a Look

Strengthening Services for Older Missourians—Missouri Task Force on Libraries & Seniors
www.sos.state.mo.us/library/development/services/seniors/report/background.asp

Talk Time at Seattle Public Library—Seniors are recruited to engage in structured discussions for non-native English speakers.
www.spl.org/literacy/talktime.html

Recasting Retirement

Margaret Mark, 2002, Civic Ventures

This study identifies strategies, messages, and language that can begin to communicate how retirement is changing and help us think differently about mobilizing the retirement population for civic action.

Bowling Alone: The Collapse and Revival of American Community

Robert D. Putnam, 2000, Simon and Schuster

This landmark study refocused the attention of many on the status of “social capital,” “civil society,” and “civic engagement.” Combining vast amounts of data on everything from bowling leagues to fraternal organizations and television, Putnam argues we have become increasingly disconnected from one another. He concludes with some general suggestions for the reinvigoration of community life.

Transitions: Making Sense of Life's Changes

William Bridges, 1980, Perseus Publishing

This book walks the reader through transitions of all types, pointing out strategies to recognize and seize new opportunities that arise in the process. Three areas are emphasized: 1) endings-effectively dealing with things that end in life 2) “the neutral zone”- what to do in the midst of transition 3) making the most out of new beginnings.

The Coming of Age: Scenarios for the Future and The Future of Aging, Health and the Capacity to Care

St. Luke's Health Initiatives, 2002

This Arizona resource provides a recent look at trends in the state, data from those 40-59, and discussion of community issues. The scenarios present four different potential futures for the state and are valuable tools for looking at individuals outlooks on aging.

Web Resources

Civic Ventures

www.civicventures.org

Civic Ventures offers an education on aging and civic engagement on its web site. Highly interactive, the site offers many practical ideas and resources. An electronic newsletter provides information on new developments in the field of civic engagement by older adults and a forum for the exchange of ideas and information within the field. Information on conferences and other current news and events is featured. Full-text research and advocacy reports are available. In addition, this is one of the primary places to learn about Experience Corps.

Libraries for the Future

www.lff.org

Libraries for the Future's site provides a wealth of ideas about how libraries can play even bigger roles in education, community, and economic affairs. The information is helpful to library professionals as well as anyone interested in aging, literacy, children, and families. This is the best place to find information about Life Options Libraries and the work of the Maricopa County Commission on Productive Aging. Libraries for the Future manages an intergenerational program entitled MetLife Foundation Reading America along with Family Place and Access programs for a wide variety of audiences.

Cleveland Successful Aging Initiative

www.successfulaging.org

This site shows the many possibilities for learning and communication with organizations and individuals. Geared for residents throughout greater Cleveland, the site features lifelong learning options, personal development, and services and programs at specific centers in the Cleveland vicinity.

The Vital Aging Network

www.van.umn.edu

This web site is designed to serve "vital agers" 55+. It offers links to opportunities for productive activities and provides an online space where individuals and organizations can work collaboratively to promote self-sufficiency, community participation, and quality of life for older adults. The web site is organized into three pathways: 1) Finding Personal Direction with specific tools and practical resources 2) Seeing All the Options with information on such topics as spirituality, transportation, health, recreation, volunteering, and employment 3) Advocating for Vital Aging with tools for employers, communities, providers, and a "what's needed and who's working on it" section.

Visiting Nurse Survey of Seniors in Maricopa County

www.pipertrust.org

The Visiting Nurse Service of New York conducted a survey in 2002 of people over 65 in 10 areas nationwide. Maricopa County was included as one of the survey sites. Survey questions touched on health, well-being, transportation, use of services, civic engagement, and service needs.

Project for Public Spaces

www.pps.org

This site defines and describes quality public spaces and how to create them. The site covers:

- Public buildings and civic design
- Markets and local economies
- Civic squares, plazas, and parks
- Transportation and livable communities

Information and tools are augmented by fee-based publications and services.

More Worth a Look

Third Age Initiative-
Leadership — Greater
Hartford Leadership
development for older
adults

www.leadershipgh.org

Massachusetts Institute
for New Teachers —
Intensive preparation for
mid-career professionals
www.coemass.org/mint

Shepherds Centers —
Interfaith programs,
learning and service.
www.shepherdcenters.org

OASIS — National non-
profit educational
organization
www.oasisnet.org

U.S. Administration on Aging

www.aoa.gov

A major source of information on a variety of issues, the administration site is valuable for individuals and program planners alike. Look especially for the materials available for Older Americans Month, including a logo, fact sheets, posters, and a guidebook. Regional contact information is included.

Elderhostel Institute Network—Boston, Massachusetts

<http://www.elderhostel.org/ein/intro.asp>

Elderhostel Institute Network is an association of independent Institutes of Learning in Retirement. The network promotes communication among the member institutes, encourages the development of new institutes, and promotes the concept to new people and communities. Elderhostel, Inc., a prominent provider of travel and learning opportunities for older people sponsors the network.



Endnotes

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