

Making Experience Matter  
in the Second Half of Life



A Report on  
**The Next Chapter Initiative**  
in Maricopa County, 2003-2007

*Final Report*  
July 2008

VIRGINIA G.  
**PIPER**  
CHARITABLE TRUST



# *The Next Chapter*<sup>™</sup>

## **A Report on The Next Chapter Initiative In Maricopa County, Arizona, 2003-2007:**

**Making Experience Matter in the Second Half of Life**

***FINAL REPORT***

***July 2008***

***Civic Ventures***

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### **About Civic Ventures**

Civic Ventures is leading the call to engage millions of boomers as a vital workforce for change. Through an inventive program portfolio, original research, strategic alliances, and the power of people's own life stories, Civic Ventures demonstrates the value of experience in solving serious social problems—from education to the environment and health care to homelessness. Founded in 1998 by social entrepreneur and author Marc Freedman, Civic Ventures works to define the second half of adult life as a time of individual and social renewal. For more information, visit [www.civicventures.org](http://www.civicventures.org).

### **About The Next Chapter**

The Next Chapter™ initiative provides expertise and assistance to community groups across the country working to help people in the second half of life set a course, connect with peers, and find pathways to significant service. Local Next Chapter projects and related programs exist in dozens of communities nationwide. For more information, visit [The Next Chapter](#).

### **About Virginia G. Piper Charitable Trust**

A private independent foundation, Virginia G. Piper Charitable Trust is dedicated to honoring Virginia Piper's philanthropic commitment to changing lives and strengthening community in Maricopa County. By investing in nonprofits and encouraging strategic planning for the future, Piper Trust strives to make Maricopa County a stronger, more nurturing and vibrant community. For more information, visit [www.pipertrust.org](http://www.pipertrust.org).

### **Acknowledgements**

Civic Ventures would like to thank Piper Trust for its ongoing support of The Next Chapter initiative. Work with Piper Trust was a true partnership in innovation.

Both Civic Ventures and Libraries for the Future contributed to the early work, supported by Piper Trust, to develop the nascent Next Chapter concept into *The Blueprint for The Next Chapter* that continues to serve nationally as the starting point for many community organizations interested in launching their own Next Chapter pilots.

Rhian Evans Allvin and Josh Allen of the Brecon Group served as Civic Ventures' local consultants through most of the project. It would have been impossible for Civic Ventures to understand the subtleties of the local landscape, identify the required breadth of potential players and manage the close-up, day-to-day aspects of such a complicated endeavor without them. The Brecon Group's knowledge of strategy, organizational structures, project and partnership development, and their passion for the big idea we were advancing together were critical to the project's success.

Next Chapter leaders from Chandler, Mesa, Scottsdale and Tempe were true innovators who tried, assessed and retried countless ways to implement concepts in the *Blueprint*. Their spirit of adventure, persistence and passion are responsible for the lessons in this report. The boomers of Maricopa County will be well-served by their willingness to build something entirely new.

Civic Ventures staff and advisors working on this project include Marc Freedman, who originally articulated the need for community institutions to create a new approach for people making transitions from midlife to a new life stage. Judy Goggin, Nancy Peterson, Steve Weiner and Stefanie Weiss were instrumental in bringing the concept to life.



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## FOREWORD

The first wave of the nation's 78 million—and Maricopa County's 900,000—boomers began entering their 60s two years ago. Unlike their parents, they look ahead to a new stage of life stretching for decades between the end of midlife careers and the beginning of true retirement, a stage that's unlikely to resemble the golden years' vision of full-time leisure. For many boomers, this new life stage presents an opportunity to find new meaning and to use their experience in new ways that improve the quality of life in their communities. For Maricopa County, this “encore” stage of life and work presents the possibility of an extraordinary pool of social and human capital with the potential to make a significant contribution to education, health care, the environment, and the nonprofit sector.

Every six seconds, another American turns 60. If we, as a society, take steps now, we can help these millions of boomers direct their considerable talents where they are needed most. To reap this experience dividend at the local level, communities must galvanize and unite committed philanthropists, innovative organizations and farsighted policymakers to create new ways of engaging boomers' time, talent and experience.

In Maricopa County, these critical steps are well underway, making the county a bellwether for the nation. Ahead of the curve in the aging of its population, Maricopa leads a movement, shaping a new vision of success for the second half of life—and bringing it to life.

Seven years ago, Civic Ventures began to work with Virginia G. Piper Charitable Trust, a new foundation in Maricopa County with a broad vision for productive aging for its community. Over five years, from 2003-2007, Piper Trust provided leadership and financial support for the Maricopa County Next Chapter initiative. The goal was, and is, to find new ways to help people in the second half of life set a course, connect with peers and find pathways to significant work and service.

Today, Maricopa County individuals, institutions, and communities have new language, new actions and new aspirations to capture the experience of boomers to address social problems. Next Chapter projects in four cities—Tempe, Mesa, Chandler and Scottsdale—are now connecting people over 50 to meaningful opportunities to serve. Of course, much remains to be done.

This report explores how these four local projects launched innovative approaches in their communities and how, in the process, they began to move forward a much broader social movement toward encore careers with social impact. These groundbreaking programs and practitioners provide important ideas and insights for other foundations, community leaders, program designers, funders, researchers, and policymakers interested in making experience matter in the second half of life. For the sake of those who want to follow in Maricopa's footsteps, this report is both candid and critical. There is always much to learn.

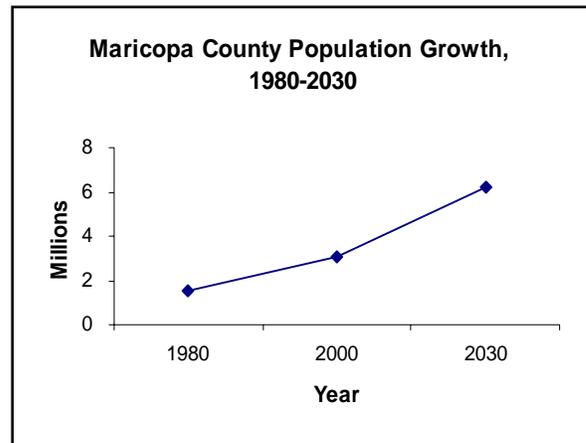
Marc Freedman  
CEO and founder, Civic Ventures

## MARICOPA COUNTY: A BELLWETHER FOR CHANGE

### Maricopa County—An Indicator, Foretelling Future Trends

With its 3.7 million residents, Maricopa County is the fourth most populous county in the nation, exceeding the population of 23 states. The county includes 25 cities. The largest is Phoenix, the county seat and Arizona’s state capital, with a population of almost 1.5 million people. The smallest is Gila Bend with just over 2,000 people. The county also includes numerous unincorporated settlements and several Indian reservations, the largest of which are the Salt River Pima Maricopa Indian Community and the Gila River Indian Community.

Growth is the word most often associated with Maricopa County. Its population doubled from 1980 to 2000, increasing from 1.5 million people to over 3 million. It is projected to double again by 2030, reaching 6 million. The county’s vast physical size—over 9,200 square miles—has enabled this growth to occur.



Aging is one factor often associated with Maricopa County’s growth, as thousands of older adults move to the area’s existing and expanding retirement communities. In 2000, 15 percent of Maricopa’s 3 million people were over the age of 60. By 2030, this percentage is expected to increase to 22 percent of a projected population of 6 million. Maricopa’s 900,000 boomers—people born between 1946 and 1964—comprise almost a quarter of its current population.

However, Maricopa County’s growth is not just about aging. Many midlife adults and families move to Maricopa seeking work and lifestyle opportunities. At the same time Maricopa County’s older population is growing, the number of young people—ages 18 and under—continues to make up over a quarter of the population. Although the percentage of young people is expected to hold fairly steady over the next two decades, their numbers will double—from just over 800,000 in the year 2000 to a projected 1.6 million by 2030.

Maricopa County Population	2000		2030	
	Numbers	%	Numbers	%
Over 60	466,269	15%	1,374,457	22%
Under 18	828,003	27%	1,585,901	26%
Total Pop	3,072,149		6,207,980	

Demographic changes—including significant growth in the number of young people and older adults, a large group of talented boomers leaving the workforce, and increasing demands on local education, healthcare and social services—present staggering challenges for the county’s social sector. However, this combination of factors also uniquely positions the county to tap the opportunity associated with its growing 60+ population to tackle these growing needs.

## Maricopa County—A Leader, Shaping the Future

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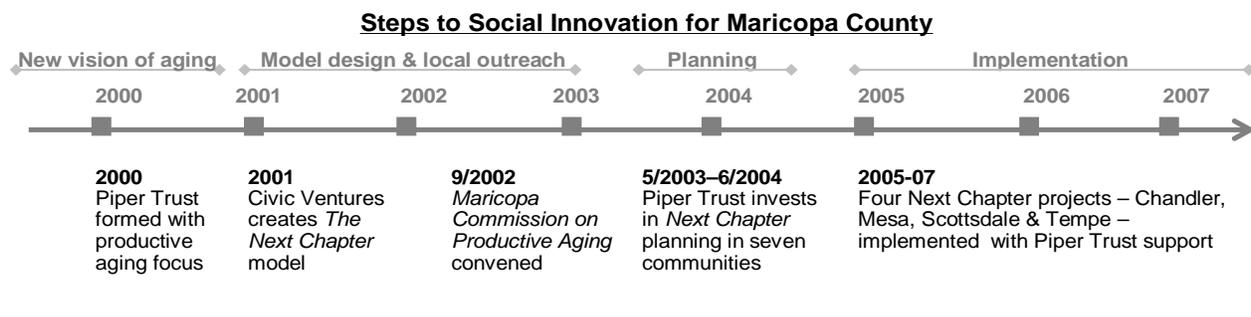
In the early 2000s, several factors converged in Maricopa County to set in motion a new strategy to respond to the looming demographic shift, growing social needs and the interest of boomers to contribute to the social good. Inspired by the work of authors Rowe & Kahn and their book *Successful Aging* and reflecting the legacy of Virginia Piper, Piper Trust established a vision that emphasized productive aging and community engagement.

Piper Trust leaders realized that societal change was required to capture boomers' experience for the social good. In 2001, at the very early stages of its development, the Trust partnered with two national entities, Civic Ventures and Libraries for the Future, to generate a strategy to advance such innovation.

*In the spirit of Virginia Piper's own commitments, the Trust is working to ensure that this community not only supports older adults' aspirations but transforms institutions, as well, to help them realize their potential. We will all be the beneficiaries, whatever our age.*

Judy Jolley Mohraz, Ph.D.  
President and CEO, Piper Trust

Piper Trust took key steps to build community awareness and advance institutional change. In 2002, the Maricopa Commission on Productive Aging brought together interested players to generate new thinking. Next, working with Civic Ventures and Libraries for the Future, the Trust supported development of a new paradigm captured in *The Blueprint for The Next Chapter*, a guide for communities ready to capitalize on the changing perceptions and realities of the emerging new life stage. Then, in 2003, the Maricopa Next Chapter initiative was launched with planning grants to seven communities. In 2005, four communities were awarded grants to implement community-wide Next Chapter innovations.



When Piper Trust launched its work on productive aging, there were few comparable models, few big thinkers and limited momentum. Maricopa County was ahead of the curve in thinking and acting.

As The Next Chapter work has taken place in Maricopa, momentum has also grown at the state and national levels. The Arizona governor's office developed *Aging 2020 – Arizona's Plan for an Aging Population* and, along with AARP, launched the *Arizona Mature Workforce Initiative*. The Arizona Community Foundation led the *Good Work for Arizona* planning process to increase older adult involvement in social change. Nationally, the Atlantic Philanthropies and MetLife Foundation unleashed several initiatives, while Grantmakers in Aging boosted awareness and support. Civic Ventures, the National Council on Aging, the American Society on Aging, and other national organizations received support to launch new initiatives to document best practices, tell the stories of boomers who found successful encore careers, and to run programs that engage boomers in social and public sector work or, in some way, prepare or

I. Maricopa County: A Bellwether for Change

connect them to that work. Today, the future is being shaped by this rich mixture of local, state and national efforts.

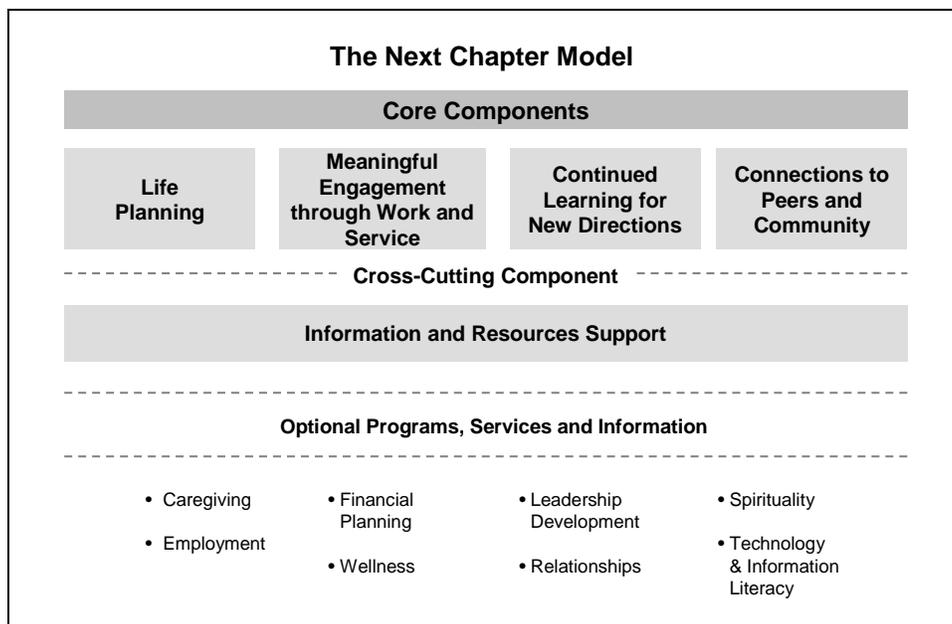
## THE NEXT CHAPTER: SOCIAL INNOVATION FOR MARICOPA COUNTY

The Maricopa Next Chapter initiative was the centerpiece of Piper Trust’s initial investment to capture the county’s experience dividend for social good. It was designed to establish the national Next Chapter model, developed by Civic Ventures, at the local level within Maricopa County.

The Next Chapter concept calls on communities to create new institutional approaches or adapt existing ones to help adults make the transition to a new productive life phase by providing support and community connections for ongoing learning, development, and contribution to society. The model was based on research that indicates that Americans in the second half of life—regardless of income, educational level, or race—want to:

- Explore options for the next stage of life.
- Retool skills, obtain new training, or pursue educational interests.
- Use their skills and experience in flexible work or service opportunities.
- Make meaningful connections with their peers and their community.

Next Chapter represents a comprehensive approach to steering adults through the transition from midlife to a next chapter of social purpose. Civic Ventures’ *The Blueprint for The Next Chapter* served as the guide to the model and a road map for putting it in place at the local level. The model includes the following features:



The focus of the model was to link together four core components for 50+ adults:

1. **Life planning programs**—to help assess their status and strengths, explore future possibilities, and set goals.

## II. Maricopa Next Chapter Background & Overview

2. **Meaningful engagement through work and service**—to take on public service roles through paid work and volunteer service.
3. **Continued learning for new directions**—to enrich their lives and retool for new careers.
4. **Peer and community connections**—places and programs to link people of all ages in the community.

Guiding principals underpinned local efforts to plan and implement The Next Chapter. The model asked communities to:

- View post-midlife adults as assets, not liabilities, for their community.
- Go beyond “business as usual” to retool traditional approaches, redirect resources and partner in new ways.
- Embed The Next Chapter concept in existing institutions.
- Engage and strengthen community leadership, action and ownership.
- Incorporate new language to reflect new realities and perceptions of aging.
- Include the 50+ population in design, leadership, and implementation.

The four Maricopa County cities—Chandler, Mesa, Scottsdale and Tempe—were selected through a competitive process that began with planning grants to explore the development of the model, secure institutional commitment, forge partnerships and develop approaches to meet their community needs and circumstances. Piper Trust then provided three-year implementation grants to launch and operate their proposed innovations.

During planning and implementation, technical assistance and support were provided by Piper Trust, Civic Ventures and, during the planning period, Libraries for the Future. Projects were also given opportunities to work together across the initiative to share expertise and boost learning.

Because The Next Chapter was not designed as a one-size-fits-all approach, each Maricopa project emerged with differing features and involved diverse players. Each project suggests a different variation on the same theme—the creation of social innovation to capture the experience dividend of boomers for social good. The next section of this report tells the communities’ stories—how each created a new institutional approach and engaged a new audience by bringing together its distinctive community characteristics and assets, using a Next Chapter approach.

## Chandler *Boomerang*: Creating a Coalition for Civic Engagement

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**Civic library  
+ Online capacity  
+ New nonprofit partners** = **Innovative Coalition for Civic Engagement**

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The city of Chandler epitomizes Arizona’s rapid population growth. Over the last half century, Chandler grew from an agricultural community of less than 4,000 people in 1950 to over 240,000 residents in 2006. In the past 25 years, its population increased eightfold. Although Chandler’s growth is often viewed as primarily suburban, it was also fueled by the establishment of manufacturing plants for large businesses such as Motorola and Intel.

One civic institution that has grown with Chandler is its library system. Chandler’s first library was built in the early 1950s through the combined efforts of the Chandler Junior Women’s Club and a town tax. In the last decade, a new downtown library was constructed with bond funds and a donation from Intel, and three new branches opened—two in conjunction with local high schools and a third in partnership with a private retail center. Chandler’s library system has also grown beyond bricks and mortar, developing strong online capacity, made possible through private support.

In 2003, when the city of Chandler began to forge a new community partnership around boomers, it was not surprising that the Chandler library system was at the table as a key partner. Library representatives joined others from the city of Chandler, Sun Lakes Education Center, Chandler-Gilbert Community College, Chandler Regional Hospital, Chandler Unified School District, Friends of the Chandler Public Library, Chandler Nonprofit Coalition, and Intel Corporation to make Chandler “a next chapter community.”

**SPOTLIGHT: Anne Christensen**—From informal to active *Boomerang* volunteer

Ann Christensen decided to volunteer at the public library to make new social and community connections in Chandler. When she answered the call to participate in a *Boomerang* photo shoot, she connected with a fellow volunteer. This informal gathering led not only to a close friendship but also to her becoming more deeply involved with *Boomerang*’s work. She wanted to help people like herself make connections—to others and to the community. From this initial encounter, Christensen has gone on to become active in the Boomer Advisory Network and has stepped forward to use her past experiences to assist with program coordination, outreach and partnerships.

Together they launched *Boomerang* to help connect resources, education, and services to the mature population of the Southeast Valley of Maricopa County. To achieve this community-wide goal and serve the city’s growing population, *Boomerang* was designed and implemented to be accessed through a website and through four library branches and two community college facilities.

While the Chandler Library emerged as lead partner, library leadership recognized that they couldn’t, and shouldn’t, do it alone. They partnered with others to create *Boomerang* programs. The Chandler Regional Hospital established a popular boomer-focused health and wellness program. The Chandler Senior Center initiated the Chandler 50+ Club and located its activities at numerous off-site locations. In 2007, the Chandler-Gilbert Community College opened a dedicated *Boomerang* space at its expanded Sun Lakes Education Center where credit and

noncredit courses are provided for mature adults and a peer-led lifelong learning program (Adventures in Learning) is based.

Organizational innovation has been a keystone of *Boomerang's* approach. Identifying a gap in the capacity and readiness of many nonprofits to engage older adults, *Boomerang* helped initiate the new Chandler Nonprofit Coalition in 2003. The coalition's goal is to engage every Chandler resident, including boomers, in the work of nonprofits in volunteer and paid roles. An Experience Bank was established to match individuals with nonprofit needs. The coalition has also helped several nonprofits start volunteer programs that target boomers. *Boomerang* continues to work with the Chandler Nonprofit Coalition, assisting with training programs for people interested in leadership positions on nonprofit boards and helping to launch a major community-wide philanthropic effort called the Chandler Gives Back Campaign. In 2007, *Boomerang* conducted a nonprofit survey to assess local nonprofits' readiness to use boomer volunteers and to determine their training needs.

Throughout *Boomerang's* development and implementation, representatives from the Chandler library system have taken on nontraditional roles, establishing the system as a true civic institution, adept at community partnerships. It has also provided extensive administrative support and put in place organizational efforts to target boomers.

## SNAPSHOT

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**Description:** *Boomerang* engages a wide variety of local organizations to help provide Chandler boomers and older adults with information, resources and programs to connect to the community.

**Features:**

- Virtual entry point at [www.myBoomerang.org](http://www.myBoomerang.org).
- Information through four Chandler Library branches, the Chandler-Gilbert Community College, and Sun Lakes Education Center, an extended campus of Chandler-Gilbert Community College.
- Information resources around life planning, re-careering, lifelong learning, social connections and civic engagement.
- A peer network of pre-retired, recently retired, or fully retired greater Chandler area community members who meet regularly to get rewired into a life of fulfillment.
- Special events, traditional workshops, topic-specific sessions conducted in conjunction with partners.
- Nonprofit community connections through the Chandler Nonprofit Coalition and Experience Bank.

**Leader:** Chandler Public Library

**Partners:** Sun Lakes Education Center, Chandler-Gilbert Community College, Chandler Regional Hospital, Chandler Nonprofit Coalition, Chandler Chamber of Commerce, city of Chandler, Friends of the Chandler Public Library and Maricopa Workforce Connections, Chandler Unified School District, and Intel Corporation

**Website:** [www.myBoomerang.org](http://www.myBoomerang.org)

## ***Mesa Life Options: Integrating Next Chapter in a Local Institution***

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**New, integrated approach  
+ Existing players  
+ Civic participation** = **Sustainable change**

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Mesa is the second largest city in Maricopa County. Its name comes from its setting atop a large mesa 100 feet above Phoenix. Mesa is one of the fastest-growing municipalities in the United States and its most populous suburban city with 450,000 residents. And Mesa continues to grow. At build-out in 2025 or beyond, its population is forecast to reach almost 640,000.

With a significant part of this growth coming from older adults moving to Mesa, the Next Chapter concept was embraced by a collaborative of the Mesa Community College, the city of Mesa and East Valley Senior Services. They joined forces to establish *Mesa Life Options (MLO)*, a new initiative to provide boomers with tools and resources to transition to a new life stage of individual and social renewal. From its inception, the collaborative worked to incorporate into existing institutions a new focus, programs, and language to engage the growing number of 50+ adults who don't define their new life stage by traditional words such as "senior" or "retirement."

As a lead partner, Mesa Community College (MCC) brought a unique perspective on active citizenship and community building. With over 27,000 students annually, MCC is the largest of the 10 colleges that make up the Maricopa Community College District. While all community colleges view "community" as a fundamental part of their mission, MCC has a long-standing commitment to innovative programs for continuing education, public dialogue, civic participation, and service-learning. MCC also recognized the potential of engaging the growing number of 50+ adults, an underrepresented group in its student population.

**SPOTLIGHT: Vern Mathern**—Finding his passion through Mesa Life Options

Vern Mathern, a Boeing retiree, is an active community member, having served for many years on city boards and commissions. In mid-2007, he heard about Mesa Life Options and began to attend MLO events where he learned about city departments, local politics, municipal courts and the media. These programs increased his interest in civic issues, and in late 2007, he decided to run for Mesa City Council, choosing to make the announcement at an MLO "coffee with the city manager" event. When he announced his intent to run for elected office and make service a much bigger part of his life, he proclaimed, "I've finally found my passion!"

From the outset, MCC believed that *Mesa Life Options* would have to be a part of the college itself to be sustainable. College leaders wanted to create a platform for the Next Chapter that would link together non-credit community education, peer-led lifelong learning, credit and degree programs, occupational training and certification, workforce development partnerships, career transition services, service-learning, civic participation, and student support.

The creation of *Mesa Life Options* affected the college and its partners in many different ways—from important institutional changes to more subtle changes reflecting a deeper understanding of Mesa's 50+ residents. East Valley Senior Services dropped the word "senior" from the names of its three senior centers and has developed boomer-targeted programs. The MCC-sponsored *New Frontiers for Lifelong Learning* deleted "retirement" from its title and is actively marketing to boomers. In conjunction with Make A Difference, the Mesa Public Schools and Piper Trust,

*Mesa Life Options* launched a new Experience Corps program to provide service opportunities for 50+ adults. Experience Corps members receive community college credit for their training.

Today, *Mesa Life Options* continues its emphasis on community partners and integration in local institutions. Mesa Community College provides managerial and fiduciary responsibility and established an advisory board within its infrastructure. In 2007, a dedicated space for *Mesa Life Options* was opened at MCC's Centennial Downtown Campus, and staff was transitioned from initial Piper Trust grant funding to the college budget. MCC's strategic plan views the downtown center as a pathway to connect boomers to college programs. The Academic and Student Affairs departments are working together to identify encore career credit programs and services needed to support boomers' success.

*Mesa Life Options* has brought change to Mesa. However, this change has not come easily or necessarily followed the course that was originally envisioned. The partners found that they needed to revisit and clarify their approach for this ambitious, multi-faceted initiative. It took more time and effort than anticipated to solidify the partnership and to create a market for boomers. Perhaps most significantly, each partner organization had to balance its own mission and audience with a focus on a new market—boomers. Each worked to maintain and build its own institution, while working together to establish the foundation for a new collaborative endeavor.

## SNAPSHOT

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**Description:** *Mesa Life Options* is a citywide initiative that provides midlife and older adults with tools and resources to transition to a new stage of life, learn new skills, and find new opportunities.

**Features:**

- A *Mesa Life Options* center at the community college's downtown extended campus.
- A noncredit curriculum to prepare volunteer peer mentors as guides for other boomers exploring their next chapter.
- Life enrichment, life balance and civic engagement programs—Regular *Mid-Week Brown Bag* and *Coffee Series* that includes opportunities to connect with local leaders, e.g., elected officials, newspaper editorial teams, police chief, judges, etc.
- Continued learning opportunities provided through MCC Community Education.
- Social connections provided through the *Mesa Life Options* center and the East Valley Senior Services' Mesa Center and Red Mountain Center.
- Experience Corps, a school-based program, offers older adults opportunities to serve as stipended and unpaid tutors for children; members receive community college credit for their training.

**Leaders:** Maricopa Community College, including Center for Community Education, Career Center, Maricopa Community Colleges Center for Civic Participation, Center for Public Policy and Service, Center for Service Learning, *New Frontiers for Lifelong Learning*, Department of Exercise Science/Physical Education, Commission on Excellence City of Mesa, including Mesa Parks and Recreation Department and the Mesa Library East Valley Senior Services (formerly Mesa Senior Services) and its three centers in Mesa Center, Red Mountain Center, Apache Junction Center

**Partners:** Mesa Public Schools, Mesa Chamber of Commerce, Mesa United Way, Arizona State University East, Make A Difference, Governor's Mature Workforce Connection, and many community organizations

**Website:** [www.mesalifeoptions.org](http://www.mesalifeoptions.org).

## Scottsdale *Boomerz*: Creating a Buzz about Boomers as Assets

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**New messages**  
**+ New work paradigm**     =     **A buzz about boomers as assets**  
**+ Engaged boomers**

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While most cities look to the future when older adults will be a quarter or third of their population, Scottsdale is already there. According to 2006 Census Bureau estimates, the average age is almost 44 and over 30 percent of its 220,000 residents are 55 or older. Scottsdale may be best known for its picturesque desert setting, affluence, arts and culture, western legacy, and desirability as a tourist destination, but it could just as easily be known for its active boomers. Many of these boomers and other active older adults are ready and willing to get involved in social issues—in their own community and in the broader world.

Scottsdale’s Next Chapter organization, *Boomerz*, is delivering a message that resonates with this receptive audience—a message about the value of connecting to civic engagement opportunities that will improve communities. Since its inception less than three years ago, *Boomerz* has already touched the lives of more than 6,000 boomers through its programs. It has become well-known for engaging people through job fairs, re-careering seminars, life planning sessions, a social entrepreneurs network and community forums. *Boomerz* is also tapping the experience and talents of older adults to build its own capacity, engaging more than 100 active volunteers in its programs, with several heading up substantive projects.

*Boomerz* strives to increase opportunities for boomers by encouraging nonprofit organizations to design meaningful pro-bono and paid roles, businesses to offer flexible work alternatives, and communities to fully capitalize on boomers’ talents, energy, wisdom and experience.

In its short history, *Boomerz* has already created a buzz in Scottsdale about the importance of engaging boomers in tackling social issues by building community awareness and involvement, testing different programs and approaches, and receiving good media coverage for its programs and activities. Although it is still exploring the best institutional structure for its own future, it has clearly demonstrated that individuals are interested and ready to get involved.

*Boomerz* (at first called LifeVentures) was launched in 2004 by Scottsdale Community College in collaboration with six other founding partners and

**SPOTLIGHT: Fred Ricker**—Spearheading innovation to attract, hire and retain boomer employees

Fred Ricker came to *Boomerz* with a strong interest in baby boomers who want to continue working and a belief that the workplace could and should become more “boomer-friendly.” He also brought extensive experience with industry collaboratives gained during his years of work with IBM and others. Through Fred’s leadership, *Boomerz* is not only partnering with employers to provide opportunities for boomers who want to work, but also helping to lead an effort to discover which employers are outstanding in developing innovative ideas regarding employing boomers, evaluating effective practices, and training others in how to follow their lead. Fred now coordinates the *Boomerz* “Boomer-Friendly Workplace Initiative.” He meets monthly with five local employers to identify conditions for successful boomer workplaces, and plans to survey employers throughout Maricopa County. In addition to receiving a small stipend for his work at *Boomerz*, Fred works part-time as a barista for Starbucks to obtain medical coverage.

### III. Next Chapter Project Stories from Maricopa County

funding from Piper Trust. The initial idea was to integrate *Boomerz* within existing community college programs and facilities. The college housed the initiative at its outset. However, as *Boomerz*'s mission and focus evolved, it became apparent that it needed a more autonomous platform to build its brand and its programs. In 2007, *Boomerz* moved from its springboard at Scottsdale Community College to a new location in mid-Scottsdale.

*Boomerz* has become active and visible in the community, but there is still much work to be done, explains executive director, Cindy Cooke. "We're looking forward to rising to the next level, serving more boomers in the Valley, and creating positive change among nonprofits, government organizations, and businesses in how they utilize this very active generation." To accomplish this, and to expand its reach and resources in Scottsdale and the surrounding Northeast Valley of Maricopa County, *Boomerz* will continue its efforts to establish an effective and sustainable organization.

## SNAPSHOT

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**Description:** A community collaborative committed to creating and cultivating opportunities to allow boomers in Scottsdale and the Northeast Valley of Maricopa County to maximize their contribution to society.

**Features:**

- Re-careering services through job fairs, outplacement, and a job bank in partnership with Jobing.com.
- An annual *Get Involved! Expo* to showcase volunteer opportunities for boomers.
- Retirement and life planning information, workshops, and coaching to help people answer the question "what's next?"
- Social entrepreneurs' network that encourages former executives to put their experience and talent to work by beginning projects or organizations that benefit society.
- Public forums, in partnership with the World Affairs Council, which stimulate interest in current and world events.

**Leaders:** Scottsdale *Boomerz*, now a stand-alone entity with its own board of directors, was initially sponsored by the Scottsdale Community College

**Partners:** Founding partners—City of Scottsdale, Scottsdale Community College, Scottsdale Area Chamber of Commerce, Scottsdale Healthcare, LINKS Community Collaborative, Scottsdale Public Library, and Salt River Pima-Maricopa Indian Community

Community & corporate partners—Scottsdale Unified School District, Arizona Republic/Scottsdale Republic, Scottsdale Healthcare, Scottsdale Unified School District, Scottsdale Chamber of Commerce, Fountain Hills Chamber of Commerce, Recreative Art Center, Vanguard, McMinn Human Resources, and others

**Website:** [www.Boomerzaz.com](http://www.Boomerzaz.com)

## **Tempe Connections: Making Tempe a Better Place to Live**

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**Vibrant Hub**  
**+ Engaged Boomers** = **A Better Place to Live**  
**+ New Opportunities**

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The name Tempe is synonymous with Arizona State University and the more than 50,000 students who attend its Tempe campus. But Tempe is more than a college town; it has a vital urban center with innovative public buildings, Tempe Town Lake, and new downtown living opportunities. It is the site of corporate offices for Insight Computers, Edward Jones, Medtronic, Motorola, JPMorgan Chase Bank, Wells Fargo, and US Airways. In 2003 Tempe was recognized by the National Civic League with the All-America City Award, which annually honors 10 communities that best exemplify the spirit of grassroots citizen involvement and cross-sector collaborative problem solving.

Tempe is also home to more than 40,000 boomers that make up a quarter of its 160,000 residents. So, in 2003, when presented with the opportunity to create a new Next Chapter institution for these boomers, the city of Tempe drew on its collaborative spirit and civic leadership to plan a place and programs not only to benefit boomers but to benefit the entire city, as well.

The centerpiece of Tempe's innovative institutional approach is the *Connections Café*, a vibrant new place to engage boomers. With support from Piper Trust, the city's leadership, and a community-wide coalition, plus a commitment of space from the city library, Tempe converted an underutilized space in the Tempe Public Library into a hub for coffee and sandwiches, along with directions and connections for 50+ adults. The *Connections Café* opened its doors in May 2006. Adjacent to the café is an attractive and well-used venue to bring together adults for learning, development and community connections. Today the café is not only an inviting space for informal gatherings for all ages, but it also generates revenue to support *Tempe Connections* programs.

**SPOTLIGHT: Diane Kundrat**—From city worker to volunteer leader and life coach

After a career with the city of Tempe, Diane Kundrat retired and found herself pondering the question "what next?" She called *Tempe Connections* and trained to become a Connections Concierge. This experience changed her life (and her vocabulary). Diane realized that she wanted to re-tool and utilize her experience to become civically engaged by helping people in the second half of life assess their status and strengths and explore their future possibilities. After taking peer mentor training and attending the Southwest Institute of the Healing Arts, she became a life coach and developed a new three-session program called *Discovery Guide*. She later joined the Tempe Connections Advisory Board and in July became the president. Under Diane's leadership, *Tempe Connections* is growing and providing more opportunities and programs for people like her.

*Tempe Connections* is powered by volunteers. Boomer volunteers are active on the *Tempe Connections* Advisory Council and they have contributed professional expertise to help support and sustain operations. Many *Tempe Connections* program offerings are designed and delivered by boomers. For example, boomers have been recruited and trained to serve as a team of Connections Concierge volunteers who provide regular one-on-one services and support to people who come into the Connections Café.

In 2006, to deepen the city's capacity to tap the time and talent of older adults to improve life in Tempe, an Experience Corps program was launched in conjunction with the Tempe Elementary School District and Piper Trust. Experience Corps is a national program that engages people over 55 in meeting their communities' greatest challenges, focusing on tutoring and mentoring elementary school students struggling to learn to read. For Tempe, Experience Corps has now become a cornerstone civic engagement opportunity, demonstrating to the community the value of older adults and providing a tangible benefit for students, schools and the Experience Corps members themselves.

For Tempe, it all adds up. Creating new programming and engaging boomers is a guaranteed way to create a better place to live for all its residents—young, old, and in-between.

## SNAPSHOT

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**Description:** Dedicated to encouraging and enabling 50+ adults to find meaning and purpose by serving their community, *Tempe Connections* provides a place to go (a café in the Tempe Public Library) for 50+ adults who want help to make the best use of this new stage of life and work.

**Features:**

- Classes and seminars on life-planning, health and wellness, financial issues, career counseling, and special interest topics.
- Connections with volunteer opportunities that enrich neighborhoods and schools.
- An inviting space—to meet informally and formally.
- Café revenues that support programming and community involvement activities for boomers and older adults.
- Experience Corps opportunities through the Tempe Elementary School District.
- Active Advisory Council committees for programming, operations, and marketing.

**Leaders:** City of Tempe Community Services Department, City of Tempe Public Library, Friends of the Tempe Public Library

**Partners:** More than a dozen organizations including: ASU Osher Lifelong Learning Institute, ASU Emeritus College, Tempe Elementary School District #3, Maricopa Workforce Connections, and Veterans History Project.

**Website:** [www.tempeconnections.org](http://www.tempeconnections.org)

## TEN INSIGHTS FOR OTHER COMMUNITIES

Piper Trust took a bold step with Civic Ventures to design and test The Next Chapter concept in Maricopa County. The goal was to develop new ways to connect older adults with opportunities to make a difference in their communities. First called Life Options, later renamed The Next Chapter, it was an ambitious undertaking.

The Next Chapter concept required people to understand several big, new concepts. First, people needed to understand that a new stage of life was emerging for individuals ending their primary careers. Next, schools, health care systems, and social service agencies needed to consider how they could be helped by an infusion of experienced, talented people. Finally, new connectors needed to be built to put people in touch with organizations needing their talent. This process required community-wide planning and mobilization across different players and different sectors.

Civic Ventures brought a national perspective to this endeavor—working in Maricopa County while also working throughout the United States. The Maricopa Next Chapter initiative followed on the heels of an earlier effort in which four institutions, funded by The Cleveland Foundation, tested a similar idea called *Lifelong Learning and Development Centers*.

Picking up on the lessons from Cleveland and other communities, Piper Trust commissioned *The Blueprint for The Next Chapter* to guide community projects. This publication (described earlier in this report) laid out key components and a recommended process for implementation. The *Blueprint* reflected the best thinking at the time about the ways communities might address the aging of the boomer population and their need for help with a transition to a next stage in life.

Each of the four Maricopa County Next Chapter projects went to work with the *Blueprint* in hand and quarterly technical assistance from Civic Ventures. What emerged were four versions of the model—with differing players, programs and results.

Summarized over the next pages are insights and observations from the development of these four Maricopa projects. It is an honest and candid appraisal of what worked and what didn't.

1. Language matters. Changes in core beliefs and language are a first step to removing barriers that get in the way of engaging 50+ adults in solving community problems.
2. It's about experience, not aging. Outdated notions of aging and the culture of providing services must fundamentally be replaced by new perspectives and approaches that support a new life stage that is not “old age.”
3. Target, and then listen to your audience. Any organization that says it will serve the full, incredibly diverse spectrum of adults over age 50 is engaging in puffery or fooling itself.
4. Boomers are ready to lead. They want to contribute their considerable talent and time to of help create the future they want to inhabit.

#### IV. Ten Insights for Communities

5. Institutions have to rethink how they do business. As organizations begin to innovate and integrate, they are faced with the challenge to balance existing institutional goals with the requirements of a new initiative.
6. The best partners are “boundary crossers.” To build successful, community coalitions, organizational leaders must cross traditional boundaries and build the capacity to nurture, manage and reward new kinds of partners.
7. What boomers want isn’t easy to find. At this stage in the game, there are more boomers who want meaningful work and service opportunities than there are high-quality opportunities to work and serve.
8. Plans for sustainability must start on day one. It’s not easy, but it’s that simple.
9. A unified communications strategy builds a strong identity. Organizations must develop, test and employ new and consistent messages and branding to establish a new stage of life and a new kind of volunteer or employee.
10. Phase in the pieces. Communities must keep their eyes on the prize—the big vision—while taking manageable steps that build toward this vision over time.

## 1. Language matters

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### *Big Picture Insights*

The failure of language to adequately describe the way people perceive themselves and the world around them is an early warning sign that major social change is underway. With the evolution of a new life stage between midlife and old age, words used to describe previous generations of older adults simply don't work anymore.

Talk of age or frailty is no longer viable. *Senior*, *elderly*, and *aged* are terms rejected by most of the current generation of older adults except to describe the oldest or neediest segment of the population. Many don't even think it accurately describes their 80-something parents. Euphemisms like *mature* and *seasoned* are out, too. We know what doesn't work, but there's still no agreement on replacement terms.

The phrase "next chapter" is received well because it has no reference to a specific age or a stage of life. Words like *experience* also work well. *Purpose* and *meaning*, while subject to a wide range of definitions, are what people say they want in the second half of life.

On the other hand, we learned that the term "life planning"—one of the four basic components in The Next Chapter concept—reminds too many people of tasks that get assigned by bosses or financial planners. Necessary? Yes. Engaging and adventuresome? Not likely. Instead, phrases that worked better for 50+ adults—*exploring options*, *making transitions*—suggest choice, adventure, and life as a journey.

*Retirement* still works as a technical term to describe someone who is no longer in the workforce, but it is rapidly falling out of favor as a lifestyle descriptor for the vast numbers of highly engaged people who may have left their midlife careers but who have decades to make additional contributions through meaningful service or paid work.

### *Lessons from the Ground Floor*

The four Next Chapter projects tested language early in their work and recognized the need for new terms to describe the transition from midlife to what's next. They knew they were talking to a younger generation of older adults.

Some of the changes they made seem small—the term "senior" dropped from a senior center's name, the word "retirement" no longer used by a lifelong learning institute, the word "elderly" removed from a funder's website. But each of these small changes built momentum for a larger transformation in thinking.

They invented new titles and approaches for their programs. Chandler's *Boomerang* held "Opportunity Fairs." These events combined a job fair and a volunteer fair to acknowledge that people were looking for new forms of work—some with pay, others without, and some creatively combining pay and volunteer service or offering alternative compensation.

Scottsdale's *Boomerz* holds regular "Talent Acquisition Coffees" in which employers meet with a group of prospective employees in an informal group setting to explain their company or nonprofit, to accept resumes or applications, and to schedule follow-up interviews.

#### IV. Ten Insights for Communities

The Tempe Library chose to name their new renovated space *Connections Café* so that all ages would be encouraged to come—and eat. Because revenue from café sales supports Next Chapter programming, it's profitable when all library patrons and staff make use of the café's services.

## **2. It's about experience, not aging**

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### ***Big Picture Insights***

To take advantage of older adults' time, talent, and experience, programs need to shift from a perspective that they are doing something *for* older adults and instead focus on how the experience of older adults can be harnessed for the good of the community. It's a fresh perspective that amounts to a reversal of the service provider approach.

Because most existing organizations have a strong service delivery ethic, it is often difficult to turn this thinking around. Many in the traditional aging services network (area agencies on aging, senior centers), as well as those that cut across generations such as health and financial services providers, have an outdated picture of someone "older." Even in institutions, like libraries and community colleges, that have multi-age missions, staff often think of older adults as needing services or looking for "edutainment."

Community leaders need to embrace the core belief that the emerging generation of older adults is an asset for the community and not a liability. Most boomers do not see themselves as service recipients, but instead want to be of service to their communities. According to the 2008 *MetLife Foundation/Civic Ventures Encore Career Survey*, nearly half of Americans age 44 to 70 want jobs that contribute to the greater good. However, these individuals will not be able to fulfill this desire if the value of their experience goes unrecognized.

### ***Lessons from the Ground Floor***

In Maricopa, Next Chapter projects first took steps to make sure their core beliefs were well-articulated and prominent and then inculcated these beliefs into their work by adapting existing institutions and creating new ones.

In Scottsdale, *Boomerz* is working with the nonprofit, public and private sectors to advance a new work paradigm that highlights and captures the experience of boomers. Its *Boomer-Friendly Workplace Initiative Project* strives to attract, hire and retain boomers in the workplace and to establish a "Boomer-Friendly" certification program for employers in Scottsdale.

In Chandler, *Boomerang* helped launch and now partners with the new Chandler Nonprofit Coalition, which gives people over 50 new ways to connect to meaningful service opportunities. Although the goal of this citywide coalition is to tap the talents of all Chandler's citizens, its online Experience Bank is well designed for boomers and provides nonprofits with access to the resumes, interests and skills of those who want to make a big difference at this stage in their lives.

In Mesa and Tempe, Piper Trust worked with Next Chapter projects and invested in another promising practice by launching Experience Corps programs in partnership with local school districts.

In each case, the Next Chapter projects delivered a new message and developed new approaches that emphasize experience, not age.

### 3. Target, and then listen to your audience

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#### *Big Picture Insights*

Too many organizations claim they are serving all older adults over age 50 (or 55, or 60) with a single set of approaches or activities. It simply can't be done. At least two and possibly three generations of adults are now over 50, and there is nothing homogenous about them. Some are still working full or part-time, some are recently retired, others have been retired for many years. Some are highly education; some not. Some are well-prepared financially for decades of life without paid work; others can't afford to stop working. Some are healthy; others are beginning to see their mobility limited.

Organizations must be realistic about the need to create distinct programs and marketing approaches for these different segments. Few organizations have the resources and expertise to serve them all. Hard choices must be made about the segments that will be served; those choices must then be communicated internally and externally. If leaders fail to recognize the need to target their audiences, they run the risk of alienating all and appealing to no one.

Understanding the boomer audience is a critical part of developing approaches to capture their experience, but it's also important to realize that the aspirations and possibilities for this audience are still emerging, as the leading group of boomers are reaching their mid-50s or 60 and just beginning to explore their next chapters. Program directors need to recognize this evolving perspective and the different population segments. As they innovate, they need to continually seek feedback from boomers and refine their approaches with this feedback in mind.

#### *Lessons from the Ground Floor*

All the Maricopa Next Chapter projects put considerable time and energy into identifying and reaching out to the 50+ audience. As part of planning, they conducted focus groups and incorporated older adults in advisory groups and task forces. Some brought in marketing experts to help them understand and refine their audience. As they developed new programs, they incorporated boomers as leaders (both staff and volunteer), participants and beneficiaries. However, they all faced challenges in determining how best to focus their efforts and to develop messages and program that aligned with emerging boomer interests. They had to continually test, seek feedback, listen, and adjust their activities and approaches.

*Mesa Life Options* initially relied on an existing lifelong learning program of retired adults for advice on programming. While the programs were well designed and delivered, they did not attract large numbers of working boomers. The hours and topics were more appealing to those who were no longer working. Today, Mesa's program is focused more intensely on the boomer demographic, drawing adults into educational sessions about the community. These brown bag gatherings attract individuals with interests in education, safety and other forms of civic participation.

Other projects offer networking opportunities or places that encourage boomers to meet and find their own connections for collaboration or idea sharing. Scottsdale *Boomerz* sponsors public forums on current events as an effective way to draw in boomers and get them engaged in the community. *Tempe Connections Café* provides an inviting physical space and runs programs that have been successful in attracting boomers.

## 4. Boomers Are Ready to Lead

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### *Big Picture Insights*

Nothing substitutes for learning from boomers in one's own community and, it turns out, nothing substitutes for boomer leadership. Boomers are ready to be engaged in Next Chapter project development and operations, to take on advisory roles, leadership positions, and paid and unpaid work. They are ready to create the future they want to inhabit.

To some degree, the ability to meet boomer needs is linked to a willingness to turn over the reins to the evolving boomer viewpoint. Since boomers are just beginning to enter their 60s, aspirations for their own next chapters are still emerging. If they aren't in leadership positions, community efforts are less likely to be successful.

### *Lessons from the Ground Floor*

It didn't take long for leaders of the four Maricopa County projects to realize that the best way to target and reach boomers was to let boomers take the lead.

*Tempe Connections* engaged an active citizen council of older adult experts to help develop a café that appealed to boomers, but was not age-segregated. Boomer board members helped with the café's fiscal plan, staff training, restaurant operations and inventory management – to increase profit. They brought their time and talent to ensure the café operation was as successful as possible. Today, many of Tempe's programs continue to be designed and delivered by boomer volunteers.

Scottsdale *Boomerz* built an extensive cadre of volunteers with high levels of responsibility for program design and delivery. Chandler *Boomerang* engaged boomers as leaders of their research, program development, and coalition building efforts.

*Mesa Life Options* was initially placed in Mesa Community College's Community Education division where few of Mesa's still-working boomers were represented among the program's participants or leadership. Community college leadership then decided to integrate Next Chapter concepts throughout the college and distribute aspects of *Mesa Life Options* into existing departments like Career Services and the Center for Civic Participation. A high energy boomer with extensive community connections was hired to oversee the new Mesa Experience Corps program and to move the civic engagement component to the forefront. Events with civic leaders now engage a new audience in dialogues about issues and problems faced by city agencies and other nonprofits. People with experience in the private sector now regularly step forward to offer strategy and business ideas gleaned from their current or former realms of expertise.

## 5. Innovate and integrate

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### *Big Picture Insights*

The Next Chapter initiative is built on the idea that innovation lasts when it's embedded into existing institutions, with care taken to maintain the identities of the innovation and the organization in the process. This approach builds on existing strengths, saves time and money, and promotes long-term ownership and sustainability.

But the work of integrating The Next Chapter into the everyday dealings and long-term visions of their host institutions isn't easy. Organizations need to continually revisit and adjust roles, approaches and timelines. They need to determine how to fit the identity of new work within their existing institutional identities.

Across the country, cities, libraries, community colleges and senior centers have emerged as institutional homes for Next Chapter initiatives. Although very different institutions, each has brought to the table a long-term commitment and a willingness to rethink how they do business.

Tensions can surface when existing older adult constituencies or staffs who serve them perceive that new efforts will replace or shortchange existing commitments. To allay fears, leaders need to be clear about resource allocations and explain the vision for integrating new work into the overall strategic plan.

### *Lessons from the Ground Floor*

Each of the Maricopa County projects now sustains many Next Chapter activities within its infrastructure. Three of the projects—Tempe, Chandler and Mesa—were successfully integrated into local institutions, but to different degrees and in different ways. The fourth project—Scottsdale—found that its initial launching pad didn't fit in the long run and created a new organization to focus solely on its mission and approach.

In Chandler, the public library embedded activities into its online and physical venues. In Tempe, city buy-in was critical and brought leadership, committed city staff across many departments, and dedicated library space for the *Connections Café* and related programs. The *Connections Café* now has a strong independent identity and operation, but one that is tied to and supported by the city.

*Mesa Life Options* is now integrated within Mesa Community College—both programmatically and physically. Its civic engagement work is coordinated by the college's Center for Civic Participation, its headquarters is in a new downtown community college facility, and it continues to offer life planning and peer coaching programs through career services that were developed as part of The Next Chapter.

Both Tempe and Mesa took an additional step to transform local institutions to more effectively tap the talents of their 50+ populations. In conjunction with local school districts and with support from Piper Trust, each launched Experience Corps. This new community service corps now operates side-by-side with *Tempe Connections*, where it shares space in the public library, and with *Mesa Life Options*, where it is part of the community college's Center for Civic Participation.

#### IV. Ten Insights for Communities

In Scottsdale, some Next Chapter leaders felt that its initial sponsor—Scottsdale Community College—was not a good long-term fit for the *Boomerz* vision and entrepreneurial approach. At the end of the implementation grant period, *Boomerz* was established as a separate 501(c)(3) nonprofit and continues to operate as an independent organization today. The upside of this decision was that *Boomerz* could focus on what leaders felt was needed to build the new program. The downside was the loss of in-kind support previously provided by the college. With no support from a host agency, *Boomerz* is now more precarious financially.

While the Tempe and Mesa project worked hard to find the right fit within the host organization, the Scottsdale project started a new organization. It is still too early to judge the wisdom of these choices. However, in all cases, the projects established institutions that align with community assets and circumstances.

## 6. The best partners are “boundary crossers”

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### *Big Picture Insights*

As community leaders look to develop new ways to engage boomers, it is critical to have the buy-in and participation of a wide group of community institutions—both those previously involved in aging and those new to the topic. Next Chapter initiatives have engaged higher education, libraries, city departments, nonprofits, health care providers, social service agencies, chambers of commerce, school districts, senior centers, corporations and others in their work.

Broad partnerships enhance and expand program delivery, diversify participants, and bring new viewpoints. Partners provide access to a wider range of programs and people than any individual organization could offer on its own. They also provide important feedback and coordination for program planning, startup and ongoing operations.

However, to make these partnerships effective, organizations need the capacity to manage and nurture partnerships. They need to spell out expectations, roles and responsibilities from the beginning. And they need a willingness (and commitment) to adjust as the work progresses.

The development of partnerships was fundamental to planning and implementing each of the four Next Chapter projects. But partnerships took more time and effort than anticipated, as project leaders had to balance different visions, interests, approaches, and aims of partner organizations. Many had to revisit and re-engineer their partnerships along the way.

### *Lessons from the Ground Floor*

Partnership development progressed in different ways in each of the four projects. The Tempe project benefited from interagency partnerships between city agencies—the library, social services, parks and recreation, and others. In Mesa, partnerships with the senior center and city resulted in access to people, programs and space, but partnership development was slowed down somewhat by changes in leadership. Both Tempe and Mesa formed partnerships with local school districts to develop and launch Experience Corps programs.

In Chandler, the library aligned with the community college, senior center and a local hospital to provide programs. *Boomerang* also spearheaded the creation of a new nonprofit coalition to not only strengthen Next Chapter work, but also to support broader nonprofit development.

In Scottsdale, although Next Chapter planning and early development was led by the community college and a local coalition, these partnerships did not fit the project as it developed. New partnerships were developed. Today, the Scottsdale project works closely with the local school district and has forged new relationships with employers.

Although all four projects made significant progress bringing partners to the table, some areas could be strengthened. For example, the projects would benefit from stronger ties with corporations, particularly around their philanthropic interests and connections with soon-to-retire or retired employees. They also need better links with volunteer recruitment and matching functions; although projects started to collaborate with the county volunteer center, the center’s closure meant that projects had to start over and look elsewhere for partners for the “meaningful engagement through work and service” component of The Next Chapter model.

## 7. What boomers want isn't easy to find

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### *Big Picture Insights*

The kinds of meaningful jobs and service opportunities that boomers want are rarely easy to find. Boomers want opportunities like paid jobs that tap their professional skills, internships, sabbaticals, flexible work hours, job-sharing, stipends, and significant unpaid service opportunities. Right now, employers are reticent to make change or unaware of the boomer talent pool, boomers don't know where to look, and there are few organizations dedicated to bridging the divide. Simply put, we need more matchmakers.

To effectively transition boomers to social purpose work and service, communities must go beyond links with existing resources and institutions and beyond current public expectations of older adult volunteers. They must influence employers and nonprofits. They must create more opportunities for training and certification. And they must create more online resources and matching services geared to boomers seeking meaningful experiences and to social sector institutions that need their time and talent

### *Lessons from the Ground Floor*

In Maricopa County, projects made significant strides in developing more and better opportunities for boomer service. They “walked the talk,” engaging boomers in paid and volunteer roles to plan and carry out Next Chapter work. *Tempe Connections* recruited and trained boomers as concierges, trainers and peer mentors. Chandler *Boomerang* took leadership in the creation of a new nonprofit coalition. Scottsdale *Boomerz* incorporated social sector work as a key piece of its job fairs and listings.

The four projects initially envisioned (and began to forge) a partnership with the Maricopa County volunteer center. Unfortunately, the center closed, leaving an unexpected and significant gap in volunteer recruitment, matching and nonprofit training—a gap that the projects could not fill on their own.

Several projects held “social purpose” job fairs that attracted large numbers of people, but available opportunities were often unpaid, routine, or without significant responsibility. Both Scottsdale and Chandler did take steps to train nonprofits about the talent pool to help expand opportunities.

Piper Trust also stepped in to expand social purpose opportunities throughout Maricopa County. Experience Corps was launched in Tempe and Mesa. Tempe also received one of National Council on Aging project's 10 Maricopa County Models of Significant Service grants to create significant paid and unpaid roles for boomers. GateWay Community College in Phoenix was funded to develop new connections to encore careers in health care, education and social services.

## 8. Sustainability planning begins on day one

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### *Big Picture Insights*

Most Next Chapter projects seek outside financial resources for initial planning and early implementation, but few have a clear idea of how projects can be sustained over the long term. It is an issue that can't wait. Successful projects work with their stakeholders to project the desired balance of revenues from fees, membership dues, corporate sponsorships, and direct or in-kind support from host institutions, partners and volunteers.

From the outset, the idea was to embed The Next Chapter projects in institutions that could sustain them in the long-run—through the reallocation of existing resources or a generation of new resources. Next Chapter projects that aren't able to be integrated into the mission of an ongoing operation need to show promise of viability as stand-alone organizations.

Original plans evolve with program experience, changing institutional commitments, and emerging knowledge about the value individuals place on the programs, services, and outcomes. New programs like The Next Chapter need to be prepared to respond to new opportunities and find their niches within organizations. The realities of innovative projects demand institutions to adapt to changing circumstances and needs.

### *Lessons from the Ground Floor*

Three of the four Arizona projects—Tempe, Mesa and Chandler—found institutional homes within other organizations. The fourth project—Scottsdale—established a new entrepreneurial organization. In all cases, they are still very much works in progress.

*Tempe Connections* is being supported through café revenues and the ongoing support of the city, which provides free space in the library. When café revenues didn't meet financial expectations in the first year of operation, the city of Tempe maintained its commitment to the program and the Friends of the Library provided staffing support.

In Mesa, the community college continues to provide staff to operate *Mesa Life Options* and has integrated Next Chapter-related components within the community college. However, it has at times been difficult to maintain momentum and identity for the comprehensive nature of The Next Chapter model.

In Chandler, the library has taken ownership and developed new partners and approaches to appeal to boomers, but not all Next Chapter features have been sustained.

In Scottsdale *Boomerz* has become an independent nonprofit organization funded through contributions and fees for activities and services.

## **9. A unified communications strategy builds a strong identity**

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### ***Big Picture Insights***

When dealing with community coalitions and host agencies, developing a unified communications strategy can be difficult. Project leaders may want to spend time early on working on a co-branding strategy that gives credit, in appropriate measure, to hosts and partners, while still establishing a unified message and visual identity.

Successful project leaders will develop a communications strategy that builds in time to get to know the local boomer audience, identifies specific target audiences, and tests branding and marketing assumptions (including project names and program ideas). Some may even want to establish informal focus groups that resemble the demographics of the intended audience.

A unified message is a strong message, so it makes sense for stakeholders and partners to agree to use consistent logos, taglines, design elements and talking points. Customers will begin to understand and identify programs as belonging to a single initiative.

Targeting is key, and one message may not work with all audiences. Brands that emphasize boomers may help to clearly define the target audience, they may alienate other groups. Vital, active adults who are older than the baby boom generation may feel excluded even though programs are quite well-suited to their interests, and younger boomers may not identify themselves as boomers at all. Projects must choose their primary audience carefully, and then design everything with that audience in mind.

As for external media coverage, now is a great time to reach out to reporters with stories about how boomers' time and experience can benefit communities. The topic has, for the past few years, been a continual subject of media interest and shows no signs of abating.

### ***Lessons from the Ground Floor***

All four projects put considerable effort into developing individual brands to reflect the shifting perceptions and realities of aging. The project names—*Tempe Connections*, *Boomerz*, *Mesa Life Options*, *Boomerang*—use new words that suggest efforts to engage older adults in new ways.

What still remains a challenge for the Maricopa County projects is the need for an overarching message and perhaps even branding that unifies the four efforts. Although Chandler, Mesa, Scottsdale and Tempe are independent cities, all are east of Phoenix and close to each another. Residents frequently drive to neighboring cities for work and other interests. Because the four projects offer different approaches to the boomer audience, it is conceivable that individuals might pick and choose from the full array of offerings countywide.

Although there was an attempt to bring the four projects together to create a common website with links to each, it became clear that the individual projects did not have the resources or capacity to maintain such an effort. Several included “a Next Chapter initiative” tagline with their name to help tie the projects together. However, without a marketing campaign in the community to raise awareness about The Next Chapter initiative broadly, it didn't have the desired effect. If language remains unique and unconnected, each person must navigate through a sea of messages, terms and brands to locate the place and programs right for them.

## 10. Phase in the pieces

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### *Big Picture Insights*

*The Blueprint for The Next Chapter* was developed as a comprehensive model for both individual and social renewal. But most project leaders find, in practice, that implementing the full *Blueprint* is simply too ambitious and complex to accomplish in a relatively short period of time. The multiple demands of the concept suggest that projects break the program components down into smaller steps.

What to do first? Fortunately, sequence is not an issue. Communities will gravitate to certain activities because they are better suited to local interests, lead institutions, and the readiness of prospective partners. Individuals will come through many doorways to access the information and, as long as steady progress is made toward building out the full vision, the project's identity will become stronger as each quality component is delivered. It is important to share the full vision with the community at the outset and to enlist the help of boomer leaders and existing organizations in creating the component stages.

At its core, The Next Chapter concept is intended to help boomers make important community contributions. But this is perhaps the most difficult component to put in place, requiring big changes in the attitudes and behaviors of nonprofit leaders, outreach and social marketing to boomers themselves, and the creation of a new group of connecting organizations to provide training and to bring boomers and encore opportunities together. As a result, it requires a steady commitment and consistent progress from the outset.

### *Lessons from the Ground Floor*

In Maricopa County, the comprehensive nature of The Next Chapter model challenged each of the four projects. Despite extensive planning, projects found that implementation took more time and more effort than they had anticipated. Although they all had three-year implementation plans supported by funding from Piper Trust, none were able to implement every Next Chapter component. They had to revisit priorities and reset strategies along the way.

While they all began with a commitment to establishing the full Next Chapter model, they launched their work from different starting points. Mesa started with an emphasis on developing the life planning component because of its lifelong learning experience and connections. Chandler began by establishing its activities within the library and forging strong connections with the local nonprofit community.

Tempe began with the physical renovation of space in its public library to create the *Connections Café*. The Tempe project was probably the most successful at “multi-tasking” early on because of its concrete vision, detailed plan, partner commitments, and most significantly strong city leadership that came with the commitment of significant resources—human, space and other in-kind support. However, taking on a construction project also diverted time and energy away from program development.

## LOOKING TO THE FUTURE . . . NEXT STEPS FOR MARICOPA COUNTY

The social innovations now in place are paving the way for Maricopa communities to help boomers find new meaning and use their experience in ways that matter for the public good.

### What's Underway

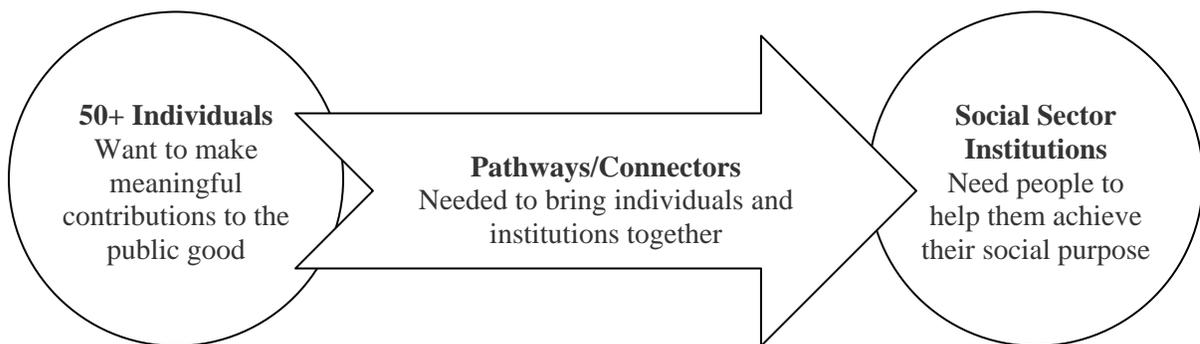
The Next Chapter projects in Tempe, Mesa, Chandler and Scottsdale are giving people over 50 new ways to connect to meaningful opportunities. At the same time, Piper Trust expanded its investment by helping to launch Experience Corps in Tempe and Mesa. GateWay Community College is creating a critical on-ramp to encore careers in health care, education and social services. Ten Maricopa County nonprofits are creating significant paid and unpaid roles for boomers.

At the statewide level, Arizona established a new Office on Aging and launched the Mature Workforce Initiative in conjunction with AARP. The Arizona Community Foundation's "Good Work for Arizona" initiative identified the need to: 1) expand both volunteer and paid roles offered to older adults, 2) offer more incentives, and 3) expand structures that support older adults who want to address problems in their communities.

### What's Needed?

Despite this growing awareness, new institutions and changing systems, there are still not enough ways for people who want to do social purpose work to connect with organizations in need of talent to achieve their missions. Because there is more work to be done to connect this supply and demand in Maricopa, Piper Trust is now supporting an effort called *Experience Matters* to "connect the dots."

Given the work that has already been done, Maricopa County is uniquely poised to take the next steps to connect interested 50+ individuals with social sector needs.



**The Landscape of *Experience Matters***

## VI. Looking to The Future . . . Next Steps for Maricopa County

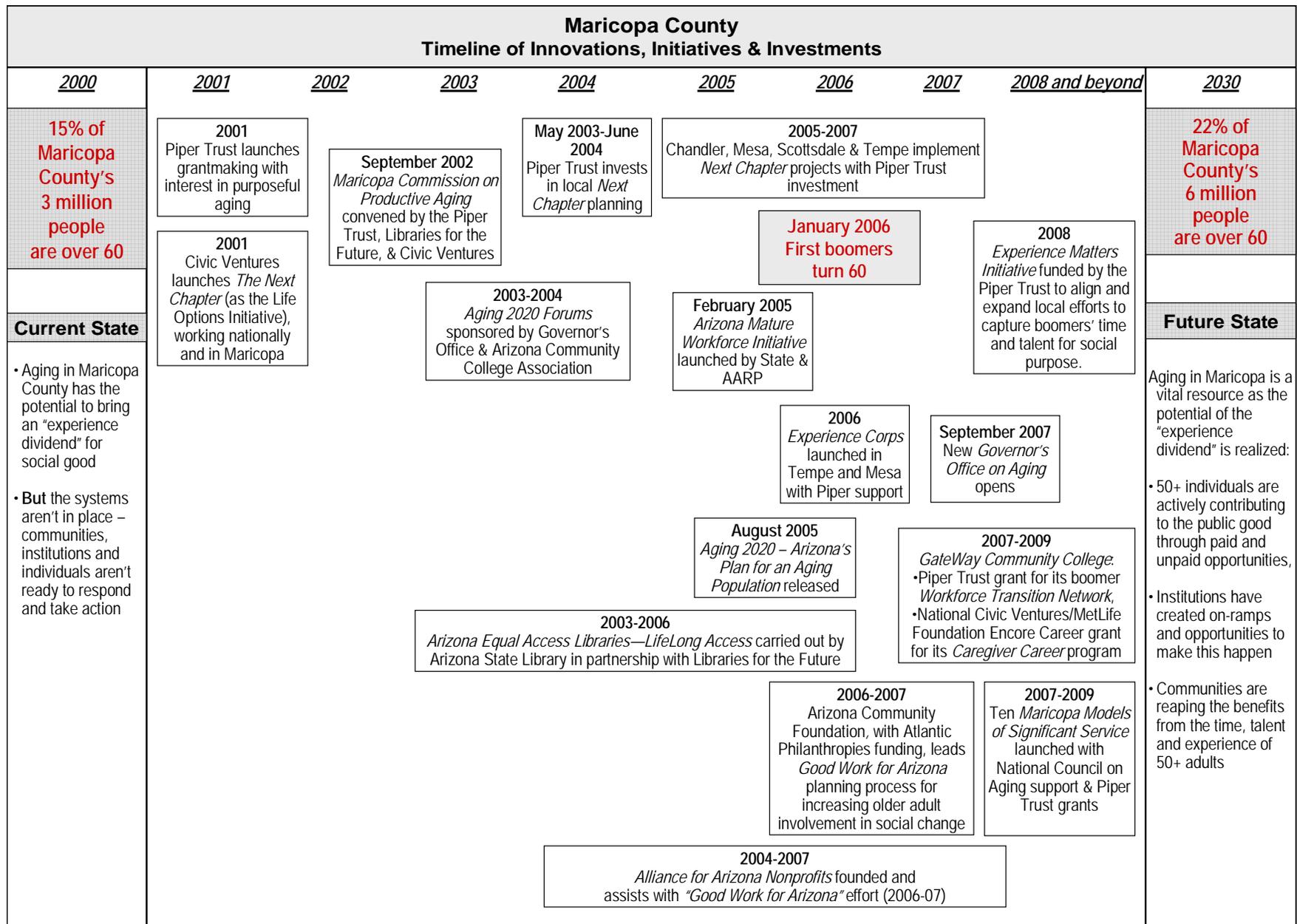
The Experience Matters Initiative will work with a wide range of organizational and individual boomer leaders to better align and expand current efforts. New partners in the private, public and nonprofit sectors will be engaged and new models will be demonstrated to capture an experience dividend for the public good. Success will be evident when Maricopa's nonprofit and public organizations have tapped the interest and engaged a significant number of boomers to help meet the county's growing needs in education, health care and social services.

By tackling these next challenges, Maricopa County will continue to build on its leadership and accomplishments, creating a future in which aging citizens become a vital resource. *Experience Matters* will provide the community with the talent, experience and passion—valuable resources to help solve, even prevent, serious social problems. Some day soon in Maricopa County ...

- 50+ individuals will actively contribute to the public good through paid and unpaid opportunities.
- Institutions will operate on-ramps and create opportunities to make this happen.
- And communities will reap the benefits, wondering how they ever got by before.

Maricopa County residents will understand, by virtue of the benefits they see in their communities that experience does matter.

Appendix A. Timeline of Innovations, Initiatives and Investments



### Spectrum of Social Purpose Work

UNPAID			STIPENDED	PAID		SOCIAL VENTURES	
Occasional informal participation	Episodic formal engagement	Ongoing formal engagement	Sustained service work, often for a specific term	Part-time or seasonal nonprofit or public sector work	Fulltime nonprofit or public sector work	Social entrepreneur	Socially-responsible business creation
<ul style="list-style-type: none"> <li>• Occasional contribution of time and/or money</li> <li>• Low-level commitment</li> <li>• Little or no volunteer structure</li> <li>• No financial compensation</li> </ul>	<ul style="list-style-type: none"> <li>• Intermittent or one-time commitment of time and/or money</li> <li>• Organized volunteer structure</li> <li>• No financial compensation</li> </ul>	<ul style="list-style-type: none"> <li>• Regular, ongoing, multi-year</li> <li>• 2-5 hrs/wk for 6-12 mos/yr</li> <li>• Possible expense reimbursement</li> </ul>	<ul style="list-style-type: none"> <li>• Ongoing</li> <li>• 10-15 hrs/wk to fulltime, term positions</li> <li>• 9-12 mos/yr</li> <li>• Stipend</li> <li>• Insurance</li> <li>• Possible expense reimbursement</li> </ul>	<ul style="list-style-type: none"> <li>• Part-time or seasonal</li> <li>• 16-32 hrs/wk</li> <li>• Wages or salary</li> <li>• Possible employee benefits</li> </ul>	<ul style="list-style-type: none"> <li>• Full-time</li> <li>• 40 hrs/wk</li> <li>• Salary</li> <li>• Health benefits</li> <li>• Other employee benefits</li> </ul>	<ul style="list-style-type: none"> <li>• Full-time+ commitment of time (most likely) and/or</li> <li>• Significant commitment of financial resources</li> <li>• Salary or benefits possible, but not necessary</li> </ul>	<ul style="list-style-type: none"> <li>• Full-time+ commitment of time (most likely), and</li> <li>• Significant commitment of financial resources</li> <li>• Salary and benefits</li> <li>• Investment returns</li> </ul>



**Encore Careers**