Leading with Experience
Engaging Older Adults as Community Leaders

An Experience Corps Tool Kit
Acknowledgements

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About The UPS Foundation

Founded in 1951 and based in Atlanta, Georgia, The UPS Foundation identifies specific areas where its support will clearly impact social issues. The UPS Foundation's major initiatives currently include programs that support increased global volunteerism, literacy, and hunger relief. In 2005, The UPS Foundation donated more than $43.8 million to charitable organizations worldwide.

About Experience Corps

Experience Corps, founded in 1995, engages people over 55 in meeting their communities’ greatest challenges. Today, in 19 cities across the country, 2,000 Experience Corps members tutor and mentor elementary school students struggling to learn to read. Independent research shows that Experience Corps boosts student academic performance, helps schools and youth-serving organizations become more successful, and enhances the well-being of the older adults in the process.

Experience Corps is a signature program of Civic Ventures, a nonprofit think tank and incubator helping society achieve the greatest return on experience.

The late John Gardner, one of the great social innovators of the 20th century, was instrumental in founding both Experience Corps and Civic Ventures. Nearly 20 years ago, he wrote a concept paper proposing an “operation give back” for older Americans called Experience Corps. In the late 1990s, he served as a founding board member for Civic Ventures. Today Civic Ventures houses a portfolio of programs that showcase what adults in the second half of life can do for society, including a national Experience Corps honoring Gardner’s original ideas.

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www.experiencecorps.org
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On a clear May morning in 2007 the Colgate Bright Smiles, Bright Futures Dental Mobile rolled into the parking lot at Bowen Elementary School in Southwest Washington, DC. By the end of the day, more than half of Bowen’s 235 students had received a dental examination. For many, it was the first dental exam of their lives.

The dental van wouldn’t have visited the school without the intervention of five Experience Corps members. These five tutors and mentors didn’t just shake their heads when they read about a local 12-year-old who died after an untreated dental infection that traveled to his brain. They didn’t assume that someone else would make sure the kids at Bowen got dental care. Instead, the Experience Corps members rolled up their sleeves — spending hours making arrangements, reaching out to parents for their permission, and ensuring that everything went smoothly.

Like most Experience Corps members, these five adults are committed tutors and mentors with a deep belief in the value of community, but little experience being visible community leaders. They took the initiative in this case because, a few months earlier, they had attended a two-day leadership institute designed to help them recognize their strengths, develop their skills, and lead, both within Experience Corps and within their communities.

The Experience Corps Learning and Leadership Exchange was an experiment. Would people over 55 want to develop their own leadership skills? If yes, what kind of leadership training would make the most sense? And, most important, would investing in the leadership of people on the far side of their midlife careers pay off for the organization and for communities?

I’m pleased to report that, with support from the Robert Wood Johnson Foundation and The UPS Foundation, we found answers to our questions. Answers that affirmed our belief in the untapped reservoir of talent present in people in the second half of life. Answers with implications for our work and possibly yours.

As millions of boomers reach traditional retirement age, we have an unprecedented opportunity to leverage not just their time and experience, but their leadership as well. This publication includes the lessons and the tools to get started. I hope you’ll use it to do what the five Experience Corps members at Bowen Elementary did so well — in a word, lead.

John S. Gomperts
President, Civic Ventures and
CEO, Experience Corps
EXECUTIVE SUMMARY

“To attract Baby Boomers to volunteering, experts on aging agree that nonprofit groups and others must boldly rethink the types of opportunities they offer — to ‘re-imagine’ roles for older American volunteers that cater to Boomers’ skills and desire to make their mark in their own way. This is vitally important to ensuring that the potential of this vast resource is tapped to its fullest.”


Traditional leadership programs target young people at the start of their careers and mid-career professionals looking for a boost on their way up the ladder. Over the past two years, Experience Corps piloted a leadership development program that was far from traditional in many ways.

The 50 people who participated were all over 50 years old. They had all completed their midlife careers, then joined Experience Corps to help students in urban and under-resourced neighborhood schools learn to read. They weren’t motivated by ambition but by an interest in learning more and doing more to make life better in their communities. The majority were African American women. Many would not have called themselves leaders.

Experience Corps made a small but bold investment in the leadership of these older adults. The hope was that, in just a few months’ time and with the benefit of a few days of intense education, these Experience Corps members would uncover their leadership talents and assume new individual and team leadership responsibilities within a growing Experience Corps program.

The reality turned out to be much more promising.

KEY FINDINGS

- **Lifelong learning:** A large percentage of Experience Corps members were interested in learning more about themselves, developing their leadership skills, and taking on more responsibility within the program and in their communities.
Diversity and leadership: The diversity of the participants — by race, age, gender, profession, and previous leadership experience — provided a rich backdrop for peer-to-peer learning and for leadership that's representative of each community's population.

Strengths-based leadership: Focusing the leadership training on uncovering and building strengths was a highly successful approach for Experience Corps members and may be a particularly useful tactic in developing the leadership talents of those in the second half of life.

Experience and leadership: Experience Corps members demonstrated leadership skills that may be particular to those in the second half of life — determination, persistence, patience, judgment, a positive outlook, and an ability to develop new approaches to solve complex problems.

Leadership and individuals: Most participants reported that the training improved their self-confidence, outlook on life, and skills as tutors and mentors.

Leadership and teams: The focus on team leadership skills was key to engaging participants, building confidence, and creating the support necessary for continued leadership activity.

Leadership back home: More than half of the Experience Corps members who attended the leadership institutes took on additional responsibility for improving the lives of the children they served after returning home. Many took on additional responsibility for running Experience Corps, in positions, for example, focused on recruiting, site management, training, and public outreach.

Leadership and service: All those who participated in the leadership training became more deeply committed to Experience Corps and to serving their communities.

Conclusions
Findings from Experience Corps's Learning and Leadership Exchange suggest a series of conclusions with implications for people of any age who see the value of strong, high-impact community leadership and civic engagement — and want more of it.

Leadership doesn't begin with a formal title, and it doesn't end when a person stops working full-time. Untapped strengths and talents can be found in unlikely places and uncovered at any age. Most Experience Corps members don't come from careers in corner offices. But most have qualities — dedication, commitment, patience, strength, integrity, and experience — that, when uncovered and nurtured, can add up to strong community leadership.
Leadership development builds social capital. Social capital — the networks that emerge as a result of building connections among people within and across groups — grows when older adults take on leadership roles, particularly within the context of an established service program. In their 2003 book Better Together, Bob Putnam and Lew Feldstein write about the win-win that Experience Corps creates: “greater pride and hopefulness of students; the lessons they learn about caring and civility; greater connection and respect among generations; a richer school environment; [and] a new sense of the possibilities of... ‘the third age.’”

In the process of leading their projects, the Learning and Leadership teams connected with other Experience Corps members, as well as to school staff and families. These networks also became cross-generational support systems. As leaders developed their projects, they created purposeful relationships with people of all ages, within and outside schools.

A small investment can go a long way. In a world of scarce resources and tremendous needs, leverage is a very important word. As Heather McLeod Grant and Leslie Crutchfield write in their new book, Forces for Good, “The concept of leverage captures exactly what high-impact nonprofits do.”

The Learning and Leadership Exchange leveraged a small investment in leadership development to change the lives of 50 Experience Corps members, improve learning for the hundreds of students they tutor and mentor, strengthen the Experience Corps program, and jumpstart some key new initiatives to improve life for students and their families in six underserved communities.

It may seem counterintuitive to invest in the leadership of those who are closer to the end of their lives than the beginning. But in a world of scarce resources and tremendous needs, it seems shortsighted and wasteful to overlook people with the time and talent to lead efforts to solve some of our most pressing social problems.

Experience Corps was created to leverage a vast untapped resource — people in the second half of life who want to focus on solving community problems. Many of the 77 million baby boomers, the first of whom turned 60 in 2006, see their next stage of life as an opportunity to give back to their communities and to transfer the talents they’ve developed during midlife careers to pro bono efforts or paid social purpose jobs. These individuals represent an incredible source of new energy — and new leadership — for volunteer programs and for the vast and growing nonprofit sector.
Experience Corps created the Learning and Leadership Exchange — a six-month learning opportunity centered around a two-day workshop in Washington, DC — to determine if a modest investment in leadership development among older adults would pay a big dividend for individual Experience Corps members, for a rapidly growing Experience Corps program, and for the underserved urban communities where Experience Corps members work.

Specifically, the Learning and Leadership Exchange was designed to help answer the following questions:

- Are older adults involved in part-time community service interested in opportunities to develop their leadership skills?
- What kind of leadership training would be most appropriate for older adults who already contribute to their communities?
- Would leadership training increase Experience Corps member satisfaction and, in turn, produce stronger program results?
- Could increased leadership on the part of Experience Corps members help to run a more efficient program and facilitate program expansion?
- Could increased leadership on the part of Experience Corps members improve children’s chances for success in school and in life?

Great gifts unused, even unsuspected, are hardly a rarity. No doubt there have always been a great many men and women of extraordinary talent who have died “with all their music in them.”

But, it is my belief that with some imagination and social inventiveness, we could tap those hidden reserves — not just for government, not just for business, but for all the diverse leadership needs of a dynamic society.

— John W. Gardner, On Leadership
A total of 50 Experience Corps members from six of the largest and fastest-growing Experience Corps projects participated in one of two Learning and Leadership Exchanges held in 2005 and 2007. Dr. Nance Lucas, a nationally-recognized leadership scholar, helped to design and facilitate both events.

The Learning and Leadership Exchange covered a wide variety of topics, including:

- leadership development
- advocacy
- building on existing strengths
- team building and group project development
- networking
- health and wellness.

“The theme of this conference was using skills you have that you are not aware of — that’s a powerful message. It’s like waking a sleeping elephant.”

— Dan Houton, Experience Corps member, Boston
**WHO PARTICIPATED?**

“Sometimes older people who are not involved for a while start to lose confidence. They say, ‘I don’t know if I can do that any more.’ They have the knowledge, but they have lost confidence in how much value the knowledge has and how it can be used.”

— Joyce Brooks, Experience Corps member, Washington, DC

Participants in the Learning and Leadership Exchange were a diverse lot, but like Experience Corps members overall, most were people of color, and most were women. All were over 50 and shared the experience of tutoring or mentoring in elementary school classrooms. They live in six cities — Baltimore, Boston, Cleveland, New York, Philadelphia, and Washington, DC.

Participants’ length of service and leadership within Experience Corps varied. Some had served as team leaders, spearheaded efforts to help solve critical school and community problems, participated as board members of the nonprofit agencies that sponsor Experience Corps projects, served as volunteer recruiters or trainers, raised funds and leveraged resources, and assumed additional responsibilities through paid staff positions. Other participants focused solely on tutoring.

Leadership experience outside of Experience Corps varied among the participants, as well. Some had never been in formal leadership positions. Some directed committees at church or had been managers in the workplace. Some were retired white-collar professionals, some had worked in blue or pink collar jobs, and others were homemakers for the majority of their lives. One participant had been a commanding officer in the Navy.

At first glance, it may seem that the gap in experience could undermine the effectiveness of the event. In fact, the opposite was true. All participants, no matter how much leadership experience they brought to the table, said they found the experience eye-opening.
Planning a Leadership Development Event
BEFORE THE EVENT

PLANNING
The planning portion of the event began 10-12 months in advance. Preparation for the participants’ experience in the event began in their home cities four months before the event with pre-conference calls and assigned reading. It continued after the event with additional assigned reading and follow-up conference calls.

RECRUITING AND SELECTING PARTICIPANTS
Experience Corps members from five of the largest Experience Corps sites in the country had the opportunity to submit an application; 25 were accepted per year.

Those interested in applying received a letter of invitation, accompanied by an application. The letter explained that the event was based on the idea that “learning and leadership are lifelong pursuits” and that investing in continuing education and leadership development can pay widespread dividends, both for individuals and communities.

The application encouraged prospective participants to describe their motivation for participation in the institute and to explain how they intended to apply their learning in their communities.

FROM THE LETTER OF INVITATION
“The more I see of human lives, the more I believe the business of growing up is much longer drawn out than we pretend. If we achieve it in our forties, even our fifties, we’re doing well. There’s a myth that learning is for young people. But as the proverb says, ‘It’s what you learn after you know it all that counts.’”

— John W. Gardner, Living, Leading, and the American Dream

SELECTION CRITERIA
Eligibility to apply was based on the following criteria:

- length of service as an Experience Corps member
- interest in working to improve the local Experience Corps program
- ability to participate in an online questionnaire, conference calls, and the complete Learning and Leadership Exchange.

“Tools to use
Sample invitation letter, application, review form, see pages 38 – 42.

“To be a good leader you have to be motivated and know how to motivate others, and you have to be open and willing to learn. You have to read and go to seminars and keep learning.”

— Willa Mae Gaines, Experience Corps member, Baltimore
Experience Corps staff also answered the following questions as they reviewed the applications:

**Overall Impression**
- Does any phrase tug at your heart or mind?
- Is the application well-written?
- Are responses complete and clear?
- Do you feel like you want to meet this person?

**Fit**
- Is this person a good fit in terms of content and networking?
- Can the event meet the expectations the applicant expresses?

**Follow-through**
- Does the application indicate that this person will take what he or she learns back to the project?
- Are there words or phrases that suggest this person seeks out new experiences and shares them with others?

**ENGAGING PARTICIPANTS**

Once applications were reviewed and decisions finalized, all applicants were notified of their acceptance status. Acceptance letters were accompanied by response forms for individuals to confirm their participation in the event.

The first activity to engage participants in the Learning and Leadership Exchange occurred five months prior to the event, when all participants received a copy of *Now, Discover Your Strengths* by Marcus Buckingham and Donald O. Clifton. The book introduced participants to a “move from strength” philosophy of development and offered an opportunity to learn more about their unique talents.

After reading the book, participants logged onto the online StrengthsFinder® Profile, which analyzes users’ answers to a wide variety of questions, then presents them with five signature themes, or strengths. The book helps readers understand how to leverage these strengths in the workplace and in their own lives.

The book and online StrengthsFinder® Profile were chosen to underscore the major theme woven throughout the event: *participants can become community leaders by leveraging the capacities currently within them*. The idea was not to develop new strengths, but instead to work with the strengths and talents unique to each individual. The StrengthsFinder® book introduced this philosophy, and the online assessment invited participants to apply the philosophy to their own lives.

"The StrengthsFinder® survey sort of surprised me. I’m sort of a laid back person but it showed me that I’ve gotten more outgoing as I get older.

— Eleanor Finch, Experience Corps member, Philadelphia
PRE-EVENT CONFERENCE CALLS: FINDING YOUR STRENGTHS

Participants, Experience Corps staff and the event facilitator shared their thoughts and insights about the StrengthsFinder® process during several conference calls before the event.

These discussions helped participants to deepen their learning about their strengths and to begin team-building before getting to the event. The calls were instrumental to the success of the event, as they allowed participants to arrive with a sense of familiarity and ease with both the material and one another.

The objectives of the pre-event conference calls were to:

- provide participants with an enhanced understanding of their leadership talents
- create a sense of community within teams
- initiate discussion of projects.

These objectives were met by:

- sending the book *Now, Discover Your Strengths* to all participants
- helping participants engage in the StrengthsFinder® online assessment process
- encouraging Experience Corps staff to discuss StrengthsFinder® with participants.

Participants came away from the calls with:

- an increased understanding of their StrengthsFinder® profile
- a sense of familiarity with other participants
- enthusiasm and ideas for the team project.
The event took place over two days. Participants traveled from their home cities to a hotel in Washington, DC, where they participated in a number of sessions and formal and informal networking events.

**The objectives of the event were to:**
- provide participants with an enhanced understanding of their leadership talents
- help participants learn how to apply these talents in their leadership roles
- create a network of peers to support continued learning
- learn about strategies and models of advocacy
- learn how to integrate personal health and wellness into community leadership.

**These objectives were met by:**
- providing group and individual exercises based on the StrengthsFinder® assessment
- engaging groups in team building sessions
- creating time for networking, advocacy training, and project development
- presenting a session on the relationship between personal wellness and leadership.

**Participants left the event able to:**
- articulate their leadership strengths and talents
- envision how they could apply their talents in community projects
- serve as community advocates
- increase health and wellness in their own lives.

“Sometimes we think that because we are seniors we know it all, but there is always something new to learn.”
— Eleanor Finch, Experience Corps member, Philadelphia

**TOOLS TO USE**
For a complete workshop schedule, see page 46.
Session Descriptions

SESSION ONE: LIVING AND LEADING WITH YOUR STRENGTHS

Opening Activity
The session opened with an activity designed to create connections within the team and establish a sense of community. Participants from the same city worked in pairs. They had three questions to discuss: What inspired you to get involved in Experience Corps? What do you want to learn over the next two days? If you were on the cover of a magazine, what would the magazine be, and what would the story be about? They then stood in front of the room and described their partner’s responses.

StrengthsFinder® Ice Breaker
The second activity generated interactions among participants from all the teams. They were given a list of strengths and related behaviors and asked to approach others to begin a conversation based on this list. The connections were spirited and full of energy, as they allowed people to describe how their strengths were expressed and to talk candidly with one another.

Strengths Synthesis
Participants then returned to their city teams and focused on their StrengthsFinder® profile. They listed their strengths, noted situations in which they had applied these strengths, and reported back to the team. The goal of this exercise was to help raise awareness of individual strengths and to understand how they could be assets to the team as a whole. Participants were asked to “listen for talent” as they heard from other team members.

Using Strengths in Teams
This exercise was designed to highlight each team’s profile using the members’ top talents. This allowed the members to reflect on the diversity of their team’s strengths. The exercise was followed by a discussion on how the team could maximize their strengths to implement a group project.

Morning Session Wrap Up: Reflection Questions
The morning ended with a series of questions participants answered on their own, as if writing in a journal. The questions were designed to provoke thoughts about finding purpose and passion in both work and life. The exercise provided a bridge between the participants’ individual visions and the team project. Participants’ responses allowed them to articulate how the team project reflected an important goal in their personal lives.

“When I put the information into the computer (for the StrengthsFinder survey) I said, ‘Oh yes—that’s the reason why you do what you do! I’m old and all of a sudden I learned who I am!’”

— Jeanne House, Experience Corps member, Baltimore
SESSION TWO: DEVELOPING A PERSONAL LEADERSHIP PLAN

“This session was based on the premise that leadership is a lifelong learning process. I wanted participants to be intentional in how they saw themselves as leaders, and to dispel the myth that you need a formal position to lead. Experience Corps members are already leaders by virtue of their role modeling.”

— Nance Lucas, Learning and Leadership Exchange facilitator

The afternoon session focused on creating a Personal Leadership Plan to help participants articulate the steps needed to put their individual hopes, visions, and dreams for community change into action. There was no emphasis on group discussion. Questions included:

- At the broadest level, what do you want to achieve with your life?
- State your personal leadership development priority in terms of a situation or situations that you would like to be able to handle well.
- How many different experiences (such as volunteering or working on a group project) can you think of that would force you to learn that ability?
- What are three action steps you can take to begin making progress on your personal leadership development plan?

“There are things you may know subconsciously — and when they are written on a page you recognize them differently. They become conscious. Bringing people’s talents to their conscious minds is good.”

— Grace Gaston, Philadelphia

SESSION THREE: THE LEADER AS AN ADVOCATE AND COMMUNITY EDUCATOR

By virtue of their life experiences, older leaders bring credibility to advocacy. The third session gave participants the tools needed to use their leadership strengths as advocates and community educators. Participants learned:

- how to educate with compelling facts and stories
- the importance of building relationships with key officials and leaders
- the importance of asking for support.

Experience Corps staff organized meetings on Capitol Hill so participants could inform their legislators about the work of Experience Corps in their district. Since Corps members are constituents tackling the problem of urban education, they all
received a hearing. The opportunity to speak on behalf of an issue was a highlight of the event for many participants. This may not be possible in other locations, of course, but participants can visit local legislators or write letters on behalf of a community issue in any city.

**Effective Advocacy Tells the Story**

Everybody loves a good story. This is especially true when legislators or officials meet with constituents. Because officials hear about many needs on a daily basis — all of them important — advocates are often trained to tell a memorable story to accompany any numbers and statistics important to their case. At the Learning and Leadership Exchange, participants worked in small groups to identify and practice sharing a memorable, emotion-packed story from their work as Experience Corps members. They also developed different approaches and stories for different audiences such as members of the school staff or board, elected leaders, or program funders.

**Session Four: Creating Group Projects**

In this session, built on the team meetings and conference calls held prior to the event, participants created strategies for community project ideas and developed a presentation to the whole group. Guiding questions included:

- What are the areas where your project could make a difference? For example, do you want to involve more parents in school activities, get books for the library, or create a student garden?
- Who is needed to help make the project happen? Think about the whole community: teachers, parents, students, principals, elected officials, and neighborhood leaders.
- What resources already exist that you can tap, and what new resources might you need?

**Session Five: Group Project Presentations**

Each team presented their project proposal to the whole group. Teams were encouraged to make their presentations creative and to have fun. They could design a poster, draw a picture or describe the project as a news story. Each proposal included:

- an idea
- a plan to accomplish the project using the strengths and talents of the team
- a timeline
- a list of ways to involve Experience Corps staff
- a list of ways to recognize success.

“The Health and Wellness was the most beneficial session. Older adults tend to ignore ourselves and think all this is a big myth. Without good health, one cannot perform.”

— Evaluation sheet
“I thought I knew everything I needed to know about leadership at this age. What I learned was a whole lot more. I realized there were parts of me (talents) that I never thought about before. Now I can see, ‘Oh this is the reason why I do what I do.’ That has been a marvelous gift. I am so grateful I was a part of it.”

— Evaluation Sheet

**SESSION SIX: HEALTH AND WELLNESS**

An emphasis on health and wellness was a key part of the Learning and Leadership Exchange. Making the connection between self-care and community-care may be especially important for older adults. Many are not only facing increasing physical limitations, but also may bring a history of caring for others before taking care of their own needs. The session offered a holistic view of health, including exercise, nutrition, stress reduction, and the importance of community support.

Dr. Marilyn Gaston and Dr. Gayle K. Porter, authors of *Prime Time: The African American Woman’s Complete Guide to Midlife Health and Wellness*, facilitated this session. These two national leaders focus on the ways in which African American women approach their own well being and, in turn, the health of their communities. Drs. Gaston and Porter are recipients of the 2006 Purpose Prize for their innovative work to improve the health of African American women, using small education and support groups.

Being a leader in community, Gaston and Porter teach, includes taking care of one’s own health. This message rang true with the event participants, a majority of whom were African American women. Additionally, this session provided an opportunity to showcase two older adult leaders in action — Gaston and Porter were both in their sixties at the time.

**Put Your Mask on First**

You’re sitting in an airplane, waiting for take off. A flight attendant is explaining what to do in an emergency, but you’ve heard it all before, so you’re leafing through a magazine. “Put your oxygen mask on first, then assist those around you,” she says. The concept is simple: you can’t assist others if you can’t breathe. Everybody knows this, right?

The Health and Wellness session suggested that many older people live as if they do not know this. The focus of the session was, “if you don’t take care of yourself, you can’t take care of others.” In other words, if you are not in your best shape — physically, mentally, spiritually — you cannot lead your community to a better place.

It’s a simple message, but a profound one. Some older leaders may have spent their lives putting others first — from family to colleagues — but good leaders put their own masks on first.
Closing Ceremony

Closing activities generally provide a chance for participants to reflect on what has been learned and accomplished, and leave participants feeling positive about the event. The Leadership and Learning Exchange closed with a reflection exercise that invited participants to provide a one-word description of the event and a wish for the future. Participants stood and declared the experience “wonderful,” “eye opening,” and “life changing.” After this empowering and “feel-good” exercise, each participant was presented with a certificate of completion.

Evaluations

The Learning and Leadership Exchange was evaluated by written participant evaluations (some immediately following the event and some six months afterwards), extensive phone interviews, and discussion with local project staff.

Written Evaluation

Experience Corps solicited written evaluations six months after the event. Most of the participants reflected that what they learned had a positive effect on them or enhanced their capabilities in some way. A few of them indicated that the event increased their levels of confidence. Others reported that their communication abilities improved.

Participant Interviews

Ten interviews were conducted with first-year participants to help inform decisions about the content for the second event. Participants were asked how they applied their learning and what ideas and recommendations they had for the next event. All of the interviewees enthusiastically responded that they would participate again. All said they would recommend it to other members.

Discussion with Local Project Staff

Staff members noted their observations about participants. A few commented that they would like to see more members selected each year or find ways to replicate the program at the local level. Staff reported that participants talked most about the StrengthsFinder assessment and interactions with their peers; the two things seem to have had the highest impact on Corps members. Participants responded most strongly to the StrengthsFinder assessment and the experience of interacting with their peers.
What Worked for the Experience Corps Learning and Leadership Exchange

A review of the evaluation sheets from the Learning and Leadership Exchange indicates the areas that worked most effectively for participants. These include:

Learning to Lead With Strengths
Teaching leadership development through a strengths-based approach paid off. Participants were enthusiastic about the “philosophy of talent” and were inspired to apply those concepts in their work.

A Holistic Approach
Participants resonated with the ideas of applying individual strengths and leadership in both their volunteer roles and personal lives resonated with participants.

Let’s Talk: The Power of Informal Networking
Participants valued having time to network. They appreciated the opportunity to:
- learn about the passion that others have for their work
- share different approaches to resolving issues with children
- learn about the diverse leadership approaches other members were using
- share within a smaller group of peers from their city.

Tools To Use
An example evaluation form can be found on page 54.
POST-EVENT CONFERENCE CALLS: HOW FULL IS YOUR BUCKET?
Post-event conference calls were scheduled to reinforce the learning that took place at the institute and to assist the team’s group projects.

To help them prepare for these conversations, participants were given the book How Full is Your Bucket? Positive Strategies for Work and Life by Tom Rath. A business bestseller, the book — coauthored by Donald O. Clifton, one of the authors of Now, Discover Your Strengths — describes ways in which even the briefest interactions affect relationships, productivity, health, and longevity.

The book was chosen to complement the work participants had already completed with the StrengthsFinder® profile and the sessions entitled Living and Leading with Your Strengths. Both books focus on a positive approach to life and work. The StrengthsFinder® approach helped participants to identify their talents and explore how these talents affect their roles as individual tutors, team members, and leaders.

The objectives of the post-event conference calls were to:
- review the book, How Full is Your Bucket?
- discuss the impact of the event in participants’ personal lives
- share stories of leadership opportunities as tutors and mentors
- continue the sense of community with other teams
- discuss the progress of group projects.

These objectives were met by:
- discussing How Full is Your Bucket?
- asking participants to describe how the event had impacted their lives
- asking for progress reports on the group projects.

Participants came away from the calls with:
- an increased understanding of how to apply the lessons from the event to their lives
- a continued sense of community with other participants
- specific ideas for putting the team project into action.

How Full is Your Bucket? takes strengths-based leadership to the realm of everyday living. The book uses the metaphor of “filling the bucket” through positive interactions and creating a “dip in the bucket” with negativity. Participants were able to recognize when they were tapping into their strengths, or “filling the bucket.”
The Theory of the Dipper and the Bucket

“How Full is Your Bucket is an extension of the philosophy of leading with your talents,” explained facilitator Nance Lucas. “The book shows readers how to increase the number of positive moments one can have in life and work.”

Participants shared stories of how they “filled the bucket” in their own lives. Some brought the idea to tutoring, and filling a bucket when students made progress. Others took the extra effort to praise children in front of their parents, ensuring that a positive message was made loud and clear. Many reported learning to see themselves in a positive light, which helped to build confidence in their leadership role. One participant said she brought the book to the grocery store and reviewed it in the check-out line!

Fast Facts From How Full Is Your Bucket?

- Nine out of ten people say they are more productive when they’re around positive people.
- We experience approximately 20,000 individual moments every day.
- The magic ratio: five positive interactions for every one negative interaction.


Put Your Bucket to the Test

The website www.bucketbook.com includes an assessment for individuals to examine their personal Positive Impact as well as information about “filling the bucket.”
Leadership and Learning Exchange: Bring it On Home

Participants in Action
Participants returned home from the Learning and Leadership Exchange with enthusiasm for creating change. The following stories illustrate the ways in which three different teams made an impact in their communities. Each story provides a model of what’s possible when individuals take leadership initiative. In every case, the changes reached beyond the team’s schools to affect their organizations and communities.

“IT Doesn’t Hurt: The Colgate Bright Smiles, Bright Futures Dental Mobile
Experience Corps/Washington DC

In May of 2007 — just three months after the event — a mobile dental van and crew of dental professionals spent the day at Bowen Elementary School in Southwest Washington, DC. By the end of the day, 128 of 235 students had visited the van.

The five-member team from Washington, DC, focused its leadership on addressing the need to meet students’ health needs. “It is our belief that healthy bodies produce healthy minds and help to achieve academic success,” explains Experience Corps member Gloria Thomas. “We wanted to show that we have the resolve to address healthcare needs. Putting words into action is what real change is all about.”

This project was initially inspired by research Thomas conducted before the Learning and Leadership Exchange. She found that that dental services to DC’s low-income residents had been “spotty at best” for decades. The absence of dental insurance, a
low participation of dentists in Medicaid, and long waits in the few clinics that accept low-income patients all added up to a lack of care for children. After attending the Learning and Leadership Exchange, Thomas was ready to tackle the issue with her Experience Corps team of leaders.

But there was one big obstacle in their way — securing signed permission forms for participation in the dental screening. History showed that forms brought home from school were rarely returned. Experience Corps leaders solved the problem by waiting for parents at the school in the early evening, when many children were picked up from the after-school program. They asked parents to sign the form then and there, and every parent asked provided the needed consent.

Experience Corps members also put up posters around the school to publicize the dental clinic and invited other Corps members to help shepherd the children to and from the van throughout the visit.

The mobile dental team provided extensive, child-friendly information about preventative dental care, handed out toothbrushes, and examined students. More than two-thirds of the students were identified as needing follow-up care. The Bowen Elementary School nurse sent results of the screenings to the parents of these children.

"Using the strengths and talents identified in our leadership training, we were able to achieve our desired goal of working together to improve students' dental healthcare habits," Thomas says.

The team’s efforts earned the attention of Harry Thomas, a DC Council member, who visited the mobile van. The team continued its efforts by contacting the Mayor’s office to recommend that the program be available to all city schools and that a committee be formed to examine the options for providing dental care for low-income families.

**GET CONNECTED: FAMILY INVOLVEMENT ACTIVITIES**

**Experience Corps/Cleveland**

Children sometimes open up to Experience Corps members. They may talk about their lives at home and at school, and this can help tutors identify areas in a child's life that affect his or her ability to perform in the classroom.
Participants from Cleveland found a common theme in the stories their students shared: the children wanted their parents to know more about their school work. They wanted them to see how hard they were trying to read, and when they did well, they wanted their parents to be proud of them.

The Experience Corps members also knew that, in most cases, parents wanted to be involved but often didn’t know how or could not find the time. Some parents juggled several jobs, cared for extended family, or struggled with the complexity of issues related to low-income neighborhoods. These were challenges that some of the Experience Corps members knew first-hand from raising their own families. They wanted to connect with the parents, and they were determined to do it in a way that was easy and productive.

They began with a simple step: a letter of introduction. Soon after the 2005 event, parents of students tutored by Experience Corps members in five schools received a letter from the tutors introducing themselves and explaining how they worked with the students.

That was followed by weekly notes that announced the achievements of the students. The notes were designed on a short form that included a few lines for a comment from the tutor and a bright star that read, “Just bursting to tell you of my latest success!” or a happy face pointing to the words, “My tutor and I are so proud that…” Parents were asked to read the note, sign it, and have the child return it. After bringing back five signed notes, the child could choose a small prize.

Any success could be celebrated. When a first grader read one full sentence for the first time, a tutor sent a note home. When a fidgety student was able to focus long enough to complete an assignment, a note praised the accomplishment.

“This project took family involvement to a whole different level,” says Kristen Frei-Herrmann, who works for RSVP, Experience Corps’s host in Cleveland. “We have had family literacy workshops once a year in each school, but this was ongoing. It made a huge difference.”

The project was so successful in the five original schools that it grew to be part of every Experience Corps school in Cleveland in 2006.
**TAking it to the next Level: an Activities Calendar**

*Experience Corps/Cleveland*

The Experience Corps members from Cleveland who attended the event in 2007 expanded the 2005 theme — parental involvement — into an activities calendar. As with the first project, it grew to affect the entire organization.

The team designed a calendar packed with daily activities for parents and children to share, five days a week. It also featured art by first and second graders. The activities revolved around literacy, arithmetic and, just for fun, some trivia. The project included incentives for the students. When they brought the calendar back to school with activities checked off by their parents, they received books, magazines, or stickers.

The calendar was introduced at one school in the spring of 2007 and was in every school within Cleveland’s Experience Corps network by fall 2007. The team also integrated the calendar into the Experience Corps training.

“The leadership of this team has had a big impact on all the Experience Corps members and the schools,” Frei-Herrmann says. “Two years ago five members came up with one project, and now it has become the foundation for a reading activities calendar in every school. Everyone has benefited from it.”

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**Bringing It On Home**

Norene Setta, a tutor from Cleveland, was chosen to be lead tutor at her school after attending the Learning and Leadership Exchange. Her new job involves checking supplies and working with teachers, the principal, and other tutors.

“I don’t know that I would have felt as free to say yes to the job if I hadn’t gone to the training,” Setta says. “Not being a real vocal person, I think I would have sat back before. So it really did help.”

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**Tips and Techniques: Empowering Tutors**

*Experience Corps/Baltimore*

The team from Baltimore wanted to raise the effectiveness of Experience Corps members by providing tools and techniques to use with students. They met with other members to collect practical ideas and suggestions and, from these discussions, produced a *Tips and Techniques Handbook.*
“The underlying principle was to empower the Experience Corps members,” reflects Susan Brooks, of the Greater Homewood Community Corporation, the Experience Corps host in Baltimore. “The team wanted to help other members understand that there is value in what they already know. They wanted to reinforce members’ strategic thinking, helping them to plan ahead and make conscious choices about working with students.”

To build the supply of tips, the leadership team initiates discussions at trainings, asking members, for example, to come up with new ideas that might motivate children to read. Team members take notes as people explore ideas, and then the tips are added to the ever-expanding handbook.

The handbook includes tips on how to:
- create a relationship with a child
- help children improve their behavior
- encourage kids
- adapt to a wide variety of learning styles
- recognize and respond to clingy children
- create a relationship and communicate with teachers
- increase parent involvement
- care for oneself.

“This has influenced the whole organization,” Brooks says. “Our tutors work under the direction of teachers, but they take leadership in tutoring individual students. The handbook gives members ideas to initiate. Sharing techniques gives members more tools to meet the challenges.”

Leadership Roles
Participants from Baltimore also took on new leadership roles within the organization. Two members are now site coordinators, which entails working with school staff and Experience Corps members to support the tutoring process. One member had been a manager in her professional life, but now felt she was a “real leader.” She is now initiating projects, mentoring other members, and doing whatever it takes to make her school a great site. The second member filled the shoes of a well-loved site coordinator who became ill. The leadership training helped him recognize and mobilize his own leadership style and strengths.

In addition, another participant from the group of five championed a new reading project, and another may soon become a site coordinator. They both credit the
Learning and Leadership Exchange with increasing their sense of what they can accomplish.

“I saw a huge evolution after members planned and led the tips and techniques training at our spring in-service event,” says Brooks.

She described asking several of the participants to do an impromptu presentation at the yearly site coordinator training. “They were totally willing to get up and do it,” she says. “It was seamless. The Learning and Leadership Exchange has made an important difference to empower members throughout Experience Corps in Baltimore.”

**Bringing It On Home — On The Job**

Staff members from Baltimore report definite changes in participants. One participant was promoted to site coordinator before the conference and was able to increase his skills. Another was promoted after the conference and gave a presentation about *How Full is Your Bucket?* at the spring training.
Reading motivation: How to help children get more interested in reading.

- Put the child’s name in a story. Have the child read the story.
- Bring things to a child to expand their understanding of a reading subject.
- Sit close and down on their level to interact with them.

Your teacher may ask students to do book reports. An EC member can also show interest in books children read. You can ask students about books they read. Steps to encourage young people or talk with them about a book include:

1. Read a book, then
2. Do a summary with (1) title, (2) author, (3) number of pages, (4) main idea, (5) age group the book centers on, and (6) how you liked the book and why.
3. Students who follow the instructions may get rewards such as gift certificates. Everyone gets something.

Another way to have children talk about a book they read is to summarize:

1. Who or what is it about?
2. Where it happened?
3. What is the problem?
4. What is the solution?

Collect books. Allow a child to choose a book. Give the children a book to take home to read. Bring the book back to school and read in front of the class.

Please check out new ideas with your teacher.
The beauty of the Learning and Leadership Exchange is that the model can be customized to fit the needs of any community. Here are some suggestions to consider as you create an event that serves your organization.

**Possible Topics for a Leadership Development Event**

**Advocacy and Community Education**
Participants can learn how to become champions for their organization in all settings — from the grocery store to the statehouse. Successful models of advocacy and best communications practices can be major components of this session.

**Conflict Resolution**
Advocacy and conflict resolution skills are essential components of leadership. This session could include strategies on how to manage conflict and enhance the participants’ understanding of how conflict, if managed appropriately, can lead to positive change.

**Diversity**
Participants may work in diverse environments yet might not fully understand the complexities and breadth of diversity. A session on understanding and working with diverse populations would increase awareness of the multiple dimensions of diversity — and lead to more effective leadership.

**Putting It Into Practice**
In this session, team members can design and plan a project that will further their work in the community. The session can encourage collaborative dialogue to allow all ideas and strategies for an action plan to be considered.
The Leadership DREAM

Participants at the Experience Corps Learning and Learning Exchange took the lead on projects that would impact their classrooms, families, and larger school communities. Other possibilities for community leadership can be found in the acronym DREAM:

- Development
- Recruitment
- Education
- Advocacy
- Marketing

An event that engages leaders in community service can use the DREAM model to help participants put leadership into action. Participants can identify one or two DREAM areas that inspire them, explore ideas to create change, and take the lead to make things happen.

Tips for Success

Take the Long View
If possible, begin planning the event about one year out. Facility and travel coordination, program content and facilitation, and the myriad logistics involved in producing an event require a sufficient amount of time.

Include Pre-event Activities
Involve participants with reading materials, team building exercises, or other activities before the on-site event. This creates community and enthusiasm, which helps get the event off to a smooth start.

Allow Plenty of Time for Networking
Participants want to learn about one another. Schedule meal times and breaks with plenty of time for people to connect and explore ideas.

Comfort Counts
Participants need comfortable seating, accessible rooms, and the ability to hear and see the facilitators. And, of course, healthy meals and snacks are appreciated. It’s also important to honor people’s time with efficiency and clarity around the agenda. Work with the facility management ahead of time to prevent any time-consuming and distracting logistical problems.

Enjoy!
Participants will bring a sense of excitement and possibility to the event. Enjoy the energy, creativity and sharing that occurs as they become leaders. Your enthusiasm will help make the event a success.
Additional Ideas for Success

Team-Up
Partner with other organizations. A collaborative effort among three to four major organizations could likely result in greater visibility about the organizations’ missions.

Keep Up
Offer continued trainings periodically to build upon experience. This would allow participants to work together over a longer timeframe and have greater opportunities to implement their learning.

Spread the Word
Increase the awareness of the value of leadership training with older adults through organizational and professional meetings. Offer a presentation at a national meeting, for example, highlighting the benefits of leadership training.
The following materials were created for the 2005 and 2007 *Experience Corps Learning and Leadership Exchange* events in Washington, DC. These tools are reproduced here to provide you with ideas and inspiration. Feel free to copy the materials with appropriate attribution to Experience Corps. Better yet, review the materials and adapt them to suit your own local programs and needs.

**Tools for Success**

**Sample Experience Corps Conference Materials**
Sample Timeline at a Glance

TIMELINE AT A GLANCE:
Planning and Implementing a Learning and Leadership Exchange (LLE)

10-12 months before the event
- Choose dates
- Contract with hotel and/or meeting space
- Contract/schedule with trainers, facilitators, special guests

Seven-eight months before
- Distribute applications
- Recruit reviewers
- Review applications and select participants
- Send the first mailing: acceptance/denial letters with response letter

Six months before
- Order books and other materials
- Collect articles on teams, stages of group development, managing conflict, and leadership concepts

Five months before
- Send the second mailing: Now Discover Your Strengths, instructions for StrengthsFinder®, a packet of reading materials, and notice of the upcoming conference call

Four-five months before
- Assign the participants the first half of Now, Discover Your Strengths as advance reading
- Help participants take the StrengthsFinder® assessment online

Three-four months before
- Conduct conference calls or in-person meetings to discuss the first half of Now, Discover Your Strengths and the results of the StrengthsFinder® assessment
- Assign participants the 2nd half of Now, Discover Your Strengths

Two months before
- Send third mailing: Additional reading material, note to keep in touch and build excitement
- Finalize all facility details: menu, room choice, AV needs, etc.
- Check with hotel concerning storage for workshop items i.e. projector, books, etc
- Confirm that dietary restrictions can be handled by hotel
- Finalize internal staff logistics: need for transportation, per diems, etc
- Follow-up with faculty re on-site needs

TOOLS TO USE
All material listed in this schedule are available on the following pages.
**One-two months before**
- Conduct conference calls or in-person meetings to facilitate discussions with participants about group projects, what their desired outcomes are, and desired ways to work together as a team

**One month before**
- Send fourth mailing: Travel plans, emergency contact sheet, and information about accommodations
- Copy/create on-site handouts
- Create/prepare on-site material packets

**After the event**
- Send member and staff reimbursements
- Mail thank you letters and photos
- Conduct conference calls with each site
- Follow up with local staff
- Debrief event and create recommendations for future events
YOU ARE INVITED TO APPLY TO THE
Second Annual Experience Corps® Learning and Leadership Exchange

The more I see of human lives, the more I believe the business of growing up
is much longer drawn out than we pretend. If we achieve it in our forties, even our fifties,
we’re doing well. There’s a myth that learning is for young people. But as the proverb says,
‘It’s what you learn after you know it all that counts.’ The fifties and forties are great,
great learning years. Even the years beyond that offer vivid opportunities.

— John W. Gardner, 2003, p. 44 in Living, Leading, and the American Dream

The Opportunity

Would you like to gain skills that will help you make your Experience Corps project even better and make a
bigger difference for kids? Would you enjoy meeting and learning from Experience Corps members from other
cities? How about learning more about your own leadership skills and style, so you can play up your strengths
and use them in your everyday life? Would you like to do all this in the nation’s capital city next February?

If you answered “yes” to all of the above, consider applying for the Experience Corps Learning and
Leadership Exchange, which will take place in Washington, DC from Sunday, February 4 through Tuesday,
February 6, 2007.

Last year, 25 Experience Corps members had the opportunity to attend the first-ever Learning and Leadership
Exchange. One participant commented: “It helped me realize that I can be of greater service to children
and parents that I work with if I know my strengths and talents, and how to use them to be more effective in
making a difference in others’ lives.” Another said: “We were treated like VIPs — I tell everyone this was the
best trip I have ever had in my life, and all I can say is, Thank you, thank you, and don’t change anything.”

This year, the Experience Corps national office will select up to five applicants from your city for this special
all-expenses-paid opportunity. There is no cost to you to apply or attend.

APPLICATIONS ARE DUE ON FRIDAY, JULY 7, 2006. Applicants will be notified of their status by Friday,
August 11, 2006.

Why Is Experience Corps doing this?

All too often, people assume that leadership is reserved only for those who hold leadership titles and formal
positions, and that leadership development is something you do only when you’re looking to climb the
corporate ladder. We, at Experience Corps, don’t agree. We believe learning and leadership are lifelong
pursuits. And we believe that investing in your continuing education and leadership development will pay off
for you, your school, and your community.
We’re thrilled that, with the support of the Robert Wood Johnson Foundation, we’re able to offer this special opportunity to Experience Corps members in Boston, Cleveland, New York, Philadelphia, and Washington, DC.

What will you learn?
- What your greatest strengths are, and how you can use these to help you be successful in your Experience Corps project and other areas of your life.
- More about what’s effective in other Experience Corps projects.
- New ideas about working with diverse groups of children and peers.
- How to communicate effectively to multiple audiences — such as school board members, local elected officials, school principals, community organization leaders, and people you want to recruit as new Experience Corps members — about what Experience Corps is, why it’s important, and how it makes a difference in your community.

Who can apply?
YOU ARE ELIGIBLE TO APPLY IF YOU:
- Have been an Experience Corps member (as a tutor, mentor, reading coach, or other role) for at least six months, served on a regular weekly schedule during 2005-2006, and plan to participate in Experience Corps again in 2006-2007.
- Were not selected to attend the LLE last year. If you applied and were not selected, you are welcome to re-apply.
- Are interested in working with Experience Corps members and staff to improve your local Experience Corps project throughout 2006-2007.
- Are willing to spend an hour in August 2006 to take a questionnaire called the Gallup StrengthsFinder either at your home or at the local Experience Corps office.
  **This must be done on a computer. If you need help working on a computer, someone at your local Experience Corps office will help you.
- Can attend a meeting in Washington, DC from the afternoon of Sunday, February 4 through the evening of Tuesday, February 6.
- Will participate in learning activities such as meetings and conference calls in your home city before and after the February event.

How do you submit your application?
- Return the application form by mail or fax by Friday, July 7 to [local project director].
- Project directors in each city will forward applications to the national office.
APPLICATION FORM

Experience Corps® Learning and Leadership Exchange

Applications Due: Friday, July 7, by 5:00 p.m. Eastern Time

Thank you for your interest in the Experience Corps Learning and Leadership Exchange. The information you provide on this application will help us learn more about you and why you are interested in this special opportunity.

A team of national Experience Corps staff will read all of the applications and will select up to five applicants from each city. You'll hear back from us by August 11 to let you know whether you've been selected for the 2007 Learning and Leadership Exchange.

Contact Information:

Name: ________________________________

Home phone #: ________________________

Cell phone #: _________________________

Number of years in Experience Corps: ____________

Experience Corps City (check one):

☐ Boston

☐ Cleveland

☐ New York

☐ Philadelphia

☐ Washington, DC

Email – only if you use this address at least once a week: ________________________________

Home address (for regular mail):

______________________________________________________________________________

______________________________________________________________________________

Questions: Please give brief responses to the following four questions (about 2 paragraphs per question). You can use other sheets of paper or write directly on this application form.

What do you like best about being a member of Experience Corps?

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________
Why are you interested in being part of the second Learning and Leadership Exchange?

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________

What three or four specific things would you like to learn from other Experience Corps members?

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________

What are some ways you would like to work with other Experience Corps members and staff to improve your local Experience Corps project? (For example, are you interested in helping recruit new members, train or coach new members, collect information about what makes your project effective, conduct community outreach, speak to your local school board, etc.?)

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________

Thank you again for your interest!
Sample Staff Review Form

STAFF REVIEW FORM

Applications for the
Experience Corps Learning and Leadership Exchange

Applicant Name | EC City | Your Name

**Overall Impression:** Does any phrase tug at your heart or mind? Is the application well-written? Are responses complete and clear? Do you feel like you want to meet this person?

0 | 1 | 2 | 3 | 4 | 5

**Fit:** Is what this person wants a good fit for what LLE will provide in terms of content and networking? Can we meet the expectations the applicant expresses?

0 | 1 | 2 | 3 | 4 | 5

**Bring It Home:** Does the application indicate that this person will take what he or she learns back to the project? Are there words, phrases, etc. that suggest this person seeks out new experiences and shares them with others?

0 | 1 | 2 | 3 | 4 | 5

**AVERAGE OF ABOVE THREE SCORES:**

**Project Input:**

Plus | Minus

**Any comments you wish to make?**
Agenda for Pre-Conference Phone Calls

Part One: StrengthsFinder® Profiles
First ask everyone to list their top five talents in the same order as they appear.

1. As you read through your profile results, what was your first reaction?
2. What new discovery have you made about yourself?
3. What surprised you?
4. Of all the things that you do well, what two things do you do best?
5. Which of your StrengthsFinder® themes contribute most to what you do best and how?
6. Tell us about a recent success you’ve had in Experience Corps. Do you see any of your strengths in action that contributed to your success?
7. How could you use any one of your top five talents in building and maintaining relationships with your colleagues in this LLE team?
8. How could you use any of your talents in preventing and solving problems in your LLE team?
9. How could you use your talents in getting things done more efficiently?
10. How could you use your talents in providing leadership and/or performing leadership functions in this team?

Part Two: Now Discover Your Strengths (1st half of book)
1. What was the most meaningful to you in the 1st part of the book?
2. What did you learn from reading the book that you can apply to your work in Experience Corps? (ask for a few examples)
3. What did you disagree with in the book?
4. What questions remain for you?
PARTICIPANT TRAVEL INFORMATION AND ACCOMMODATIONS FORM

Learning and Leadership Exchange — FEBRUARY 4TH–6TH, 2007

Please complete and send this informational survey to:
Attention: Conference Manager, 2120 L Street, NW Suite 610, Washington, DC 20037

NAME:________________________________________________________________________________________

Travel Information

Arrival
AIR
Arrival airport:
☐ DCA- Reagan National Airport
☐ BWI- Baltimore Washington International Airport
☐ IAD- Dulles International Airport

Airline & flight # __________________________
Time of arrival __________________________

GROUND
☐ Train: Train # ____________________________
☐ Driving - Time of arrival __________________

Departure (all departures must be after 3pm, February 6th)
AIR
Departure airport:
☐ DCA- Reagan National Airport
☐ BWI- Baltimore Washington International Airport
☐ IAD- Dulles International Airport

Airline & flight # __________________________
Time of departure __________________________

GROUND
☐ Train: Train # ____________________________
☐ Driving - Time of departure __________________

Room Preferences (check all that apply and preferences are not guaranteed)
☐ Wheelchair accessible ☐ Other: ___________________ ☐ No accommodation preferences

Dietary Preferences (check all that apply)
☐ Diabetic ☐ Allergies (please list) _________________________________
☐ Vegetarian/Vegan ☐ Other: _________________________________
☐ No dietary preferences

Is a non-conference attendee traveling with you (significant other, friend, partner, etc.)? ☐ yes ☐ no
If yes, do you want to request a room w/ two double beds? ☐ yes ☐ no
PARTICIPANT EMERGENCY CONTACT INFORMATION FORM

Learning and Leadership Exchange — FEBRUARY 4TH–6TH, 2007

EMERGENCY NOTIFICATION FORM

NAME________________________________________________________

CITY __________________________________________________________

CONTACT ONE
Name of Contact _____________________________________________

Relationship ________________________________________________

Phone _______________________________________________________

Alternative Phone ____________________________________________

CONTACT TWO
Name of Contact _____________________________________________

Relationship ________________________________________________

Phone _______________________________________________________

Alternative Phone ____________________________________________

CONTACT THREE
Name of Contact _____________________________________________

Relationship ________________________________________________

Phone _______________________________________________________

Alternative Phone ____________________________________________
CONFERECE AGENDA

Learning and Leadership Exchange — FEBRUARY 4TH– 6TH, 2007

Sunday, February 4
12:00 – 6:00  Registration
3:00  Hotel Check-in Begins
5:00 – 6:00  Welcome Reception (Solarium)
6:00 – 7:30  Dinner (Solarium)
   Opening Remarks and Overview of LLE: Michelle Hynes, Director of Experience Corps

Monday, February 5
8:00 – 8:30  Breakfast (Monet 3)
8:30 – 9:00  Opening Activity
9:00 – 10:30  Living and Leading With Your Strengths, Dr. Nance Lucas
10:30 – 10:45  BREAK
10:45 – 12:00  Living and Leading With Your Strengths (continued), Dr. Nance Lucas
12:00 – 1:00  Lunch
   12:30 — Orientation to Hill Visits, Elizabeth Fox and The Beacon Group
1:15 – 2:45  Developing a Personal Leadership Plan, Dr. Nance Lucas
2:45 – 3:00  BREAK
   Hill Group check-ins with Elizabeth Fox, The Beacon Group,
   and Experience Corps staff escorts
3:00 – 6:00  Visits to Capitol Hill
5:00 – 8:00  Buffet Dinner available (Caucus Room)

Tuesday, February 6
8:00 – 8:30  Breakfast (Monet 3)
   Check out of room before 8:30 am
8:30 – 9:30  Learning From Each Other: Roundtable Discussions
9:30 – 10:00  Group Project Overview
10:00 – 10:15  BREAK
10:15 – 11:45  Group Project Meetings
12:00 – 1:00  Lunch
   12:30 — Dr. Marilyn Gaston and Dr. Gayle K. Porter, authors of Prime Time: The African
   American Woman’s Complete Guide to Midlife Health and Wellness
1:30 – 2:30  Group Project Presentations
2:30 – 3:00  Closing Ceremony
3:00  Adjourn and Travel Home
WORKSHEET FOR OPENING ACTIVITY

2007 Learning and Leadership Exchange

Opening Activity

NAME

CITY

What inspired you to get involved in Experience Corps?

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________

What do you want to learn over the next two days?

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________

If you were on the cover of a magazine, what would the magazine be and what would the story be about?

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________
WORKSHEET FOR DEVELOPING A PERSONAL VISION AND LEADERSHIP PLAN

Developing A Personal Vision And Leadership Plan

1. What are you about? At the broadest level, what do you want to achieve with your life?

2. What do you stand for? What are you willing to sacrifice to reach your goals? What values do you hold sacred?

3. If you were to leave this world tomorrow, what would you want your legacy to be? What would you want people to say that you had meant to them?

SAMPLE WORKSHEET FOR IDENTIFYING DEVELOPMENTAL OPPORTUNITIES

Identifying Developmental Opportunities

1. State your personal leadership development priority in terms of a situation or situations that you would like to be able to handle well (e.g., “When I have a good idea and need to get others to support it, I’d like to learn how to develop a strategy to get them on my side”).

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

2. How many different experiences (such as volunteering, working with certain people, working on a group project) can you think of that would force you to learn that ability?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

3. Which experiences would be most powerful teachers? Use “****” to indicate very powerful, “***” to indicate moderately powerful, and “**” to indicate not very powerful.

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

# WORKSHEET FOR ACTION PLAN

## How Can You Get There?

Think of ways you can get the powerful experiences you identified in your personal leadership plan. List as many paths/action plans as you can think of. (Be sure to consider such things as volunteering for a task, asking for a new assignment in your group project, etc.)

<table>
<thead>
<tr>
<th>Experience</th>
<th>Experience</th>
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<td>Paths:</td>
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<td>Paths:</td>
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WORKSHEET FOR CREATING A LEARNING ENVIRONMENT

Creating A Learning Environment

A. Consider how you will get the support you need to make this a valuable learning experience for you.

<table>
<thead>
<tr>
<th>Information</th>
<th>Incentives</th>
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<tbody>
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<table>
<thead>
<tr>
<th>Resources</th>
<th>Support and Encouragement</th>
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</table>

B. What are three action steps that I can do within the next month to begin making progress on my personal leadership development plan?

1. 

2. 

3. 

GROUP PROJECT GUIDELINES

2007 Learning and Leadership Exchange

Purpose of the Group Projects
To continue making a difference in your local communities by building upon your experiences, talents, strengths, and what you have learned from the Experience Corps Learning and Leadership Exchange.

Each group will select one common project — there will be one group project per city. The five LLE participants, and others you enlist to help, will carry out the project with guidance from a staff person in your home city.

DURING YOUR GROUP PROJECT MEETINGS
1. Think creatively and realistically about possible ideas. You might capitalize on existing assets in the schools and cities, building on what already exists. To begin, your group might spend a few moments brainstorming ideas for projects and then discuss the merits of each one before making a decision. Take 10-15 minutes to list possibilities.

2. How will you decide which project to pursue? Here are some things to think about:
   ▶ What are some problems you think you could help solve or areas where your project could make a difference? For example, do you want to involve more parents in school activities, or get better books for the library, or create a community garden that makes the neighborhood more beautiful while giving students opportunities to learn about plants.
   ▶ How does your proposed project relate to the mission of Experience Corps? Who will benefit from your group project — students, parents, teachers, community leaders, others?
   ▶ Who is needed to help make the project happen? Who is interested in its success — teachers, parents, principals, neighborhood leaders, others?
   ▶ What resources already exist that you can tap into — and what new resources might you need?

   If you need it — take 10 more minutes to make a decision.

3. What will you call your project? Take 5-10 minutes to think of a name that explains your purpose and will get people’s attention. Think “headline” — maybe 6 or 8 words — and then just one sentence to describe what you are trying to do.

4. How will your project get done? Begin to map out a plan to accomplish your project. Discuss the various strengths and talents of your team members. Who has particular talents for certain tasks? How can each team member support others? How can you apply what you have learned about your talents and the talents of others in this process? Take 15 minutes for this discussion.
5. What is your timeline? When do certain tasks need to be accomplished to ensure the successful completion of your group project? How will you work with your respective Experience Corps project coordinator and/or the office staff? Who will be the liaison from your group to your office project coordinator? How will you communicate the idea of your project to those who will benefit from it (e.g., school leaders, teachers, parents, etc.)? How will you involve them? Take **20 minutes** for this discussion.

6. What will success look like? What do you hope will be the project’s early successes? What might be your challenges? Take **10 minutes** for this discussion.

7. Take the last **10 minutes** to plan what you will say during your presentation this afternoon. See more information below.

**GROUP PROJECT PRESENTATIONS ON FEBRUARY 6, 2007, 1:30–2:30**

Each group will provide a 5-7 minute presentation on its group project. You can choose just one person to be your speaker, but you should involve all members of your team in planning your presentation. Please keep in mind that you need to be informative yet brief! Be prepared to share the most important things about your project with your colleagues from other groups. We will have a short period of time for questions and comments after each presentation.

Here’s a template you can use to make a poster for your presentation, or feel free to be creative — draw a picture, create a news story, etc. Have fun!

~~~~~~~~~~

**PROJECT TITLE**

Subtitle or sentence about purpose

- Who our project will serve
- What our project will do
- Who we’ll involve in making it happen
- Results we hope we’ll see after one year
Thank you very much for being part of the 2007 Learning and Leadership Exchange. To help us improve future meetings like this one, please answer the questions below.

Are you an:  □ Experience Corps Member □ Experience Corps Staff

1. Overall, how useful did you find the Learning and Leadership Exchange?
   □ Not useful at all  □ Somewhat useful  □ Very useful  □ Highly useful
   Why?
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________

2. Which session did you find to be the *most beneficial* to you? Why?
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________

3. Which session did you find to be the *least beneficial* to you? Why?
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________

4. What one or two specific things would you *change* to improve this conference overall?
   __________________________________________________________
   __________________________________________________________
PLEASE RATE the following sessions from 1 to 5, 1 being “poor” and 5 being “excellent”

<table>
<thead>
<tr>
<th>Session/Activity</th>
<th>1 Poor</th>
<th>2 Okay</th>
<th>3 Good</th>
<th>4 Very Good</th>
<th>5 Excellent</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sunday afternoon: Travel to the Conference</td>
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<tr>
<td>Sunday evening: Welcome Reception and Dinner</td>
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<tr>
<td>Monday Morning: Living and Leading With Your Strengths</td>
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<tr>
<td>Monday Afternoon: Visits to Capitol Hill</td>
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<tr>
<td>Tuesday Morning: Roundtable Discussions</td>
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<tr>
<td>Tuesday Morning/Afternoon: Group Project Discussions</td>
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<tr>
<td>Tuesday Lunch: Dr. Gaston and Dr. Porter</td>
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<tr>
<td>Conference Experience Overall</td>
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</table>

What additional comments would you like us to consider?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

Thank you!
POST-CONFERENCE CONFERENCE CALL AGENDA

Experience Corps Learning and Leadership Exchange
Post-Conference Phone Interviews

March 2006

1. What specifically are you applying in your Experience Corps role that you learned from the Learning and Leadership Exchange?

2. What was not covered in the program content (topics, sessions) that you wished would have been included in the program?

3. What has been your experience with your group project? What would make it an even better experience?

4. Now that you’ve gone through the program, would you do it all over again? Why or why not? Would you recommend this program to other Experience Corps volunteers? Why or why not?

5. One of the program goals is to continue the learning and leadership exchange after the conference ends and when everyone goes back to their respective cities and schools. How do you envision continuing your learning beyond the conference? What will help you continue the networking you initiated at the conference?

6. What other ideas or suggestions to you have for future conferences?
February 21, 2007

(Member Address)

Dear (Member),

On behalf of the Experience Corps national staff, I would like to extend our sincere appreciation for your participation in the 2007 Learning and Leadership Exchange. We hope you had a wonderful time in Washington, DC; it was a pleasure to be your host! More importantly, it was a great opportunity for us to learn from you, both through informal conversations and through your conference evaluation. As a token of our appreciation, please find enclosed a group photo.

Your overwhelming enthusiasm and commitment to the Experience Corps program and, in particular, to the students you serve were evident throughout the conference and were well-reflected in your group project presentation. We hope this positive experience will continue to guide you as you implement your group projects. As you work on your project, I encourage you to consult your team members, the local Experience Corps staff, and your books Now, Discover Your Strengths and How Full Is Your Bucket? as sources of motivation and information.

The monthly follow-up calls that Dr. Nance Lucas will conduct with each city’s team are another opportunity for you to get feedback and assistance as you integrate your top strengths into your Experience Corps service and your other day-to-day activities. Enclosed you will find a handout detailing the schedule and logistics for these calls. Prior to the conference call, please take the time to read How Full Is Your Bucket?, which you received at the Learning and Leadership Exchange.

Once again, thank you for participating in the 2007 Learning and Leadership Exchange. If you have any additional questions, please do not hesitate to contact me, Maureen Eccleston, or any of the other national office staff.

Best wishes for the rest of the school year!

Sincerely,

Michelle E. Hynes
Director, Experience Corps
Email to project sites after training

I’m working on putting together a brief report on outcomes from the 2007 Learning and Leadership Exchange, and I’m hoping you can help! Would you please share with me any information you have about how the group projects are going? Also, I’m interested in hearing if you see a difference in the leadership of the members that attended the LLE.

You can frame your answer any way you like; feel free to use the questions below for guidance. Your help is appreciated!

Questions to Consider

➤ Have all five members continued to work on the group project?
➤ Have there been any successes with the project to date?
➤ Are there solid plans for the project moving forward?
➤ Have the LLE participants recruited other members to work on the project (formally or informally)?
➤ Have the members demonstrated significant or different leadership skills since returning from LLE?
➤ Have you noticed any change in the members that attended LLE?

Sample Response

All five members have remained engaged, and we consider this to be a success.

➤ At least three members have led/encouraged tips and techniques discussions in their school-based member group meetings.
➤ One member has been involved in working with increasing reading/incentives as a technique in her school.
➤ One member began serving as a Site Coordinator due to a vacancy in his school shortly before the conference; a second team member has been identified for her skills and was chosen as a Site Coordinator for a newly opening school.

The leadership training has been an asset for them and the program.

➤ Leadership Team meetings have continued the planning process and brainstorming of tips and techniques.
➤ Additional EC members have joined the Leadership Team meetings.

I believe we are seeing greater emerging leadership and assertiveness by team members. Team members have reported personal success with the “drip” technique and will be enthusiastically presenting it at the April In-service. We have ordered 12 Filling Your Bucket books as door prizes — and have a bucket in my office to be used in the presentation!
SUGGESTED RESOURCES

- **Materials Used in the Learning and Leadership Exchange**

  **All in the Family**
  This is an article published in *the tutor*, a publication of the Northwest Regional Educational Laboratory. It was included in the Learning and Leadership Exchange packet. http://www.nwrel.org/learns/tutor/sum2003/sum2003.html

  **How Full is Your Bucket?**
  This site offers information on the book and its approach to positive psychology. http://www.bucketbook.com/

  **Reading for Meaning**
  This is an article published in the *tutor*, a publication of the Northwest Regional Educational Laboratory. It was included in the Learning and Leadership Exchange packet. http://www.nwrel.org/learns/tutor/spr2004/spr2004.html

  **StrengthsFinder**
  This website provides information about the StrengthsFinder model and the book, Now, Discover Your Strengths. http://sf2.strengthsfinder.com/

- **More From Civic Ventures**

  **Encore: Finding Work That Matters in the Second Half of Life**
  *Encore: Finding Work That Matters in the Second Half of Life* is a book by Marc Freedman, CEO of Civic Ventures and founder of Experience Corps. The site includes examples of people over 55 as community leaders. www.encore.org

  **The New Face of Work**
  This survey, published by the MetLife Foundation and Civic Ventures, reports on boomers and their hopes for work and community service in retirement. http://www.civicventures.org/publications/surveys/new-face-of-work.cfm

  **The Next Chapter**
  This is a Civic Ventures initiative that provides assistance to community groups working to help people in the second half of life set a course, connect with peers, and find pathways to significant service. http://www.civicventures.org/nextchapter/overview.cfm
**The Purpose Prize**
The Purpose Prize awards people over 60 whose leadership and innovation helps to make long lasting change. http://www.purposeprize.org/index.cfm

**Other Programs and Publications**

**Baby Boomers and Volunteering**
This is brief from the Corporation for National and Community Service that provides an analysis on boomers and civic engagement activities. http://www.getinvolved.gov/pdf/boomer_vol.pdf

**Coming of Age**
This is a nonprofit organization developing an online course to help nonprofits build capacity to offer volunteer opportunities for older individuals. www.comingofage.org/nonprofits/

**Creative Senior Leadership Program**
This program is based at the University of North Carolina in Asheville and provides leadership training for seniors. http://www.unca.edu/ncccr/cslp/

**Great Expectations**
This is a publication from VolunteerMatch to help nonprofits find volunteers who offer a lifetime of personal and professional skills. http://www.volunteermatch.org/nonprofits/resources/greatexpectations/

**The Leadership Learning Community**
The Leadership Learning Community (LLC) is a national organization that works to strengthen the capacity to transform society by connecting those committed to leadership development. http://www.leadershiplearning.org/

**Money Magazine**

**National Council on Aging, RespectAbility**
The website offers information on the RespectAbility initiative, which seeks to help nonprofit organizations make more effective use of older Americans in community-based efforts. http://www.respectability.org/

**Senior Leadership Initiative**
The initiative is a year-long leadership training program at the University of North Carolina in Chapel Hill. http://www.aging.unc.edu/seniorleaders/index.html