

THE NATIONAL CONFERENCE of

RE SERVE

A division of **FEDCAP**



BOSTON 2014



COMPENDIUM

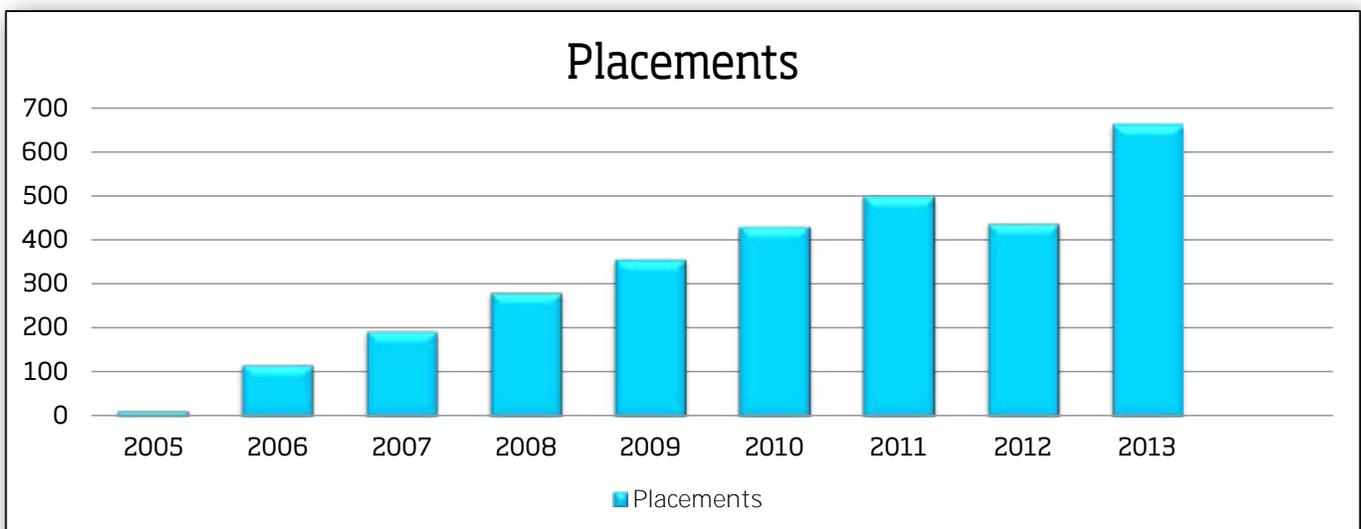
ReServe was founded in 2005 by three social entrepreneurs- **Jack Rosenthal, Herb Sturz and Michael Weinstein**. These visionaries saw the tremendous potential of leveraging the skills and talents of older adults who wanted to put their experience to work for the greater good once their primary careers came to an end. "Following 9/11, I had so many of my friends and colleagues asking me 'what can I do' to help", mused Mr. Rosenthal as he talked about the origin of ReServe. "So Herb, Michael and I brainstormed this idea....if we could match organizations that needed help with people who were retired and wanted to find a way to give back, and if we could pay these pay people a small stipend to ensure their commitment, it might work."



Close to 3,300 placements later -the idea has indeed worked.

EXPANSION ACROSS THE COUNTRY

There is nothing like a great idea whose time has come. Initially launched as a pilot program in New York City, ReServe has grown rapidly and expanded throughout the country. Through a grant from Atlantic Philanthropies, ReServe offices were established in Miami, FL; Boston, MA; Newark, NJ; Baltimore, MD; Southeast Wisconsin; and Westchester County, NY. As a result of this expansion the number of community partners has grown significantly; ReServe has engaged 743 nonprofits, schools, community organizations and government agencies. ReServists - lawyers, doctors, nurses, teachers, business executives, bankers, accountants, fundraising professionals, scientists, corporate recruiters and more - have collectively provided close to one million hours of community service.





THE EVOLUTION OF SOCIAL IMPACT AREAS

As **ReServe's** story unfolded, we found that while many individuals wanted to use their skills in fields similar to their past careers, others wanted to do something completely different. That recognition led to the development of Social Impact Areas. With the retirement stage of life lasting as long as 30 years, there is significant opportunity for these ReServists to make a real difference, and to fulfill their aspirations by giving back.

EDUCATION: Education and training provide the foundation for employment and other important life outcomes. With education, a job becomes a sustainable career path. Education is linked to job satisfaction, higher income, improved health status and enhanced quality of life. Education is also a platform for individual character development, which ultimately strengthens communities. Unfortunately, many youth who live in impoverished communities fail to graduate from high school or attend college, and even if they do, very few graduate. Many ReServists expressed strong interest in helping young people complete their education and today over 200 ReServists are working in the **READY, Middle School ExTRA** and **PrepNOW!**[™] programs which are having significant impact on the lives of youth and young adults.

READY, ReServe's first social impact initiative, recruits, trains, and supervises ReServists to provide critical support to students in underserved communities with college preparation activities. READY ReServists help students research and select colleges, write college essays, submit college applications, and complete financial aid applications.

ReServist Barry Sommers did the research and produced a flyer for students listing 75 grants and scholarships. ReServist Vivian Lee has assisted in recruiting 90 college representatives to visit the school where she is serving, while ReServist Irene Diamond has succeeded in helping several first-generation and undocumented students explore free summer educational opportunities at colleges.

Over 100 ReServist Success Mentors are working in the Middle School ExTRA program, an initiative to boost literacy for disadvantaged middle school students in New York City. Patricia Haynes, a Success Mentor and retired family engagement specialist with the NYC court system, loves the intimacy of the small group format and the camaraderie she shares with her students.

Blake Heller, Project Manager for Harvard EdLabs, the research partner in the Middle School ExTRA program, said that ReServe is one of the nation's most important and underleveraged sources of talent. "ReServists are making a real impact on students' lives," he said. "The middle school literacy program is a shining example of how to leverage the skills of older Americans."

ReServists are also delivering PrepNOW![™] – Fedcap's one of a kind web-based professional development course - to hundreds of foster parents to help them create college-going cultures in their homes. Success Mentor Cynthia Coomb-Smith is delivering the innovative, modules-based curriculum to 11 foster parents. One of the foster parents, a single mom, had never graduated from high school. "After listening to my ReServist about the importance of education, I became inspired and have enrolled to complete my GED," she said. "I want to show the kids in my care that if I can do it, they can too."

“The accumulated skills and life experiences of people who have finished their midlife careers represent an underutilized reservoir of human capital.”

“I feel buoyed by this program,” said ReServist Patricia Haynes. “It’s a great joy to share with young people the context of my life and learning, and to see them develop as people, start to dream about the future and believe that it is possible.”

HEALTH CARE: In 2008, The Institute of Medicine (IOM) issued a landmark report, *Retooling for an Aging America: Building the Health Care Workforce* that called attention to a critical shortage of health care workers in all areas and the lack of any formal training in geriatrics for professional and family caregivers. The IOM report recommends that “the definition of the health care workforce be expanded to include everyone involved in a patient’s care: health care professionals, direct-care workers, informal caregivers (usually family and friends) and patients themselves.” ReServists served as Peer Coaches for WeCOACH (Community Older Adults Care about their Health), a community-based wellness initiative, launched in partnership with New York City Health and Hospitals Corporation (HHC), to help low-income seniors with uncontrolled diabetes. Peer Coaches recruited patients into the program, facilitated their participation in exercise classes, led workshops and helped participants navigate the HHC hospital system. The first 58 participants who completed the program saw a dramatic drop in hospitalizations and emergency room visits.

Additionally, ReServe have been placed 22 ReServists with the Council of Senior Centers and Services (CSCS), in a peer advising/outreach capacity to help end elder hunger by increasing awareness and participation in the Supplemental Nutrition Assistance Program (SNAP), as well as other food and benefits programs for older adults.

ReServe is also recruiting 12 ReServists to serve as health mentors with NYC Department for the Aging (DFTA) Health Promotion Services. The ReServists will educate older adults at senior centers and NORC’s using evidence-based health programs.

Finally, up to 15 ReServists will be recruited and trained to serve as dementia care mentors/coaches as an extension of Fedcap’s Home Health private and ambulatory care programs. They will educate, support, and mentor patients, caregivers and home health aides who provide services to people with varying stage of dementia.



THE FUTURE OF RESERVE IS BRIGHT.

The ReServe Strategic Plan positions us for significant growth in the next five years including an expanded geographical footprint, a thriving National ReServe headquarters, a growing number of ReServists, a diverse and committed set of community partners, a dynamic and growing Advisory Board and a range of social impact initiatives.

THE CONVENING.

With a strong foundation in place, ReServe convened its second national meeting in Boston on July 21 to 22 where close to 100 community leaders, advisors, ReServists, program partners, and staff joined in a conversation about ReServe - past, present and future.

OPENING RECEPTION Monday, July 21, 2014

The conference began with an opening reception at Community Work Services (CWS), a Fedcap subsidiary. Serena Powell, CEO of CWS and Sr. Vice President Fedcap's New England Region welcomed participants and supporters of ReServe Greater Boston to the reception. Jack Rosenthal, ReServe's founding chairman, provided a look back at ReServe, from its inception in 2005 to the current period of growth, expansion and success. Deborah Sale, ReServe's new national board chair, provided a look forward to a future of continued growth and expansion, and a host of innovative new ideas, programs and partnerships



Clockwise: Serena Powell, Deborah Sale, Jack Rosenthal

ReServe NATIONAL CONFERENCE DISTRICT HALL, BOSTON Tuesday, July 22, 2014



KEYNOTE: More Years, More Life: The Plasticity of Aging

Ursula Staudinger, Ph.D, founding director of the Robert N. Butler Columbia Aging Center and Robert N. Butler Professor at the Columbia University Mailman School of Public Health.

Ursula Staudinger, a leading worldwide figure in understanding human development, set the stage for the ReServe National Conference with a fascinating presentation on the Plasticity of Aging - that is, the extraordinary ability we have to modify the aging process through changes within the body or in the external environment. Her research suggests that programs like ReServe - where older adults learn new skills and meet interesting people - contributes to this plasticity and in fact, "ReServing" is good for you!



Ursula Staudinger, Ph.D

Dr. Staudinger's presentation revealed that biology is only one component of human growth and development. Socio-cultural context and thought/attitude behavior are also critical factors. Changing the way we grow old requires interventions both on the side of the individual as well as that of society.

Exercise, openness to new experiences and moving out of one's comfort zones are steps we can all take to improve our mental and physical health as we grow older. Dr. Staudinger presented research that showed how aerobic fitness training impacts aging: individuals participating in aerobic walking programs had higher level of cognitive performance than those participating in relaxation activities. Specifically, walkers were better able to take in new information because aerobic walking promotes prefrontal activity- reactivating brain cells - which are necessary for processing new information, particularly as we age. By learning new skills and engaging in varied activities, we challenge our brain and produce higher levels of cognitive functioning.

Key takeaways from this presentation included:

- ReServing is good for you! Nonprofit programs should provide support and encourage older adults to try new activities to promote confidence that they can succeed in new areas.
- Move out of your comfort zone - be curious and open to new experiences.
- Terminology is important - a “society of longer lives” is more apt than a silver tsunami.
- 80 really is the new 70! New research shows that chronological age of 80 years today is equal to a “health age” of 70 years (Vaupel, 2011, Nature).
- Avoid judging or thinking about people based on a chronological age - we are more than the sum of our years!

Dr. Staudinger encouraged participants to reference and download the document:

More Years, More Life: Recommendations of the Joint Academy Initiative on Aging, available at:

<http://www.jp-demographic.eu/about/documents/more-years-more-life.-recommendations-of-the-joint-academy-initiative-on-aging>

SESSION 1: Panel of ReServists

A panel of ReServists from Boston, New York and Miami convened to talk about why they joined ReServe, share their experiences and discuss the impact that ReServe has made in their lives. Reasons for joining ReServe echoed the findings/highlights from the keynote address:

“I did not want to repeat myself,” said Bill Newlin, a NYC ReServist and recently retired CEO of the Jacob Riis Settlement House in New York City. “I wanted to be in an environment that creates change.” Bill coordinates Fedcap’s PrepNOW!™ program in New York City that is working to create a college-going culture in foster homes. “I had to peel away the layers of what I thought I knew about foster care versus what I need to know.” A moment of impact came for him when leafing through PrepNOW! monthly reports and learning that one of the youth in care got a full ride to Sarah Lawrence. “Now that is real change, and I had something to do with it!”



Bill Newlin, ReServist

“I wanted to stretch myself,” said Deborah Golden, a ReServist from Boston who has put her fundraising/development skills to work for the underserved in the Greater Boston area. “I work with a low income population of people who often have no voice. Understanding their world was a challenge,” she said. Her moment of impact was when she learned that the high school graduation rate of the program she supported was 100% as compared to the area average of 23%.



Deborah Golden, ReServist

“I’m a ‘new age senior’ with a lot of life ahead of me,” said Miami ReServist, Virginia Aponte. She has been instrumental in the developing coaching/mentoring roles for ReServists in regional high schools and colleges and says the model - and stipend - are keys to success. “Paid work is valued in our country and the workplace sees us differently because of the stipend.” Virginia had an impact moment when she ran into a student that she mentored at Wal-mart and gave her a bit hug because she had been admitted to her first choice college.



Virginia Aponte, ReServist

SESSION 2: Path to Financial Stability

“How do you keep a business running when, at its core, the business is about doing good?” That question provided the framework for a presentation on a ReServe Affiliate’s Pathway to Financial Stability by Christine McMahon, Fedcap President and CEO. First and foremost, while it is a mission driven agency—it is a business and needs to be financially structured to operate as a business. Critical to running a solvent business is understanding the difference between what it costs you to provide the service and what you are “selling” the service for. Because ReServe is still a “young” non-profit, we are still learning the actual costs to engage community partners and recruit, screen and match ReServists. We have also learned that this cost is not fixed as certain placements demand more in terms of personnel time. Having the core services of ReServe fully understood in terms of cost is imperative.



Christine McMahon, Fedcap President and CEO

“In the past several years since Fedcap combined with ReServe, we have learned a tremendous amount.”

- When we combined with ReServe most of the affiliates were in their startup phase, which is typically 9 to 18 months. We believe that new affiliates should have 70% of total expenditures for the first year covered and multiple contracts in place before launching. This provides the opportunity for planning and business development focused on the second year. Multi-year contracts are critical to sustainability as they build program equity and they allow for planning 2-3 years out.
- The funding mix for a successful ReServe needs to include foundations, program fees, government contracts, institutional funding and donors. While we have not yet calculated the optimal mixture of these funding sources, by focusing on all of the above affiliates will be in the best position for success. Building your Advisory Board should be conducted with this funding mix in mind, seeking to engage individuals who can help to leverage their contacts to advance any of the funding options.
- When applying for foundation grants, approach the project officers by scheduling an exploratory meeting, learning about their goals, their mission and then explore with them how ReServists can deliver the impact that they are looking for, tackling tough social problems while creating meaningful pathways for adults 55+. This has been very effective in the social impact areas of education, health and fighting poverty. We have been able to secure large grants by designing programs that speak to the foundations strategic goals and building the skills of ReServists into the program design.
- How you place ReServists makes a significant difference. It takes a lot of work (personnel costs) to engage a community organization, “sell them” on the concept of ReServe and make the match. Imagine how much more cost effective if for the same amount of engagement time we could place 3-5-10 ReServists in an organization. This “wholesale” or multiple placement strategy is important to offset the one at a time placement costs.
- Individual donor support has been an underdeveloped area. We need to develop very specific “asks” focused in targeted areas such as our social impact areas. Again, part of the role of the Advisory Boards is to help generate enthusiasm and contacts for ReServe in any given community. We are in the process of building a bequests/legacy program that can also advance this element of financing.
- The payment model for funding ReServe is not fixed. Currently we are charging out community partners anywhere from 15.00-21.00 per hour based on the requirements. If a program partner requires specialized recruitment, training, specific tools, it will take much longer to fill their needs and it is perfectly reasonable to charge more.

■ As in any business, environmental shifts require ongoing planning, laser-focused on being relevant. One of the things that drew Fedcap to ReServe was that we believed it was an incredible and timely idea that given the demographic shifts, would continue to have relevance for decades to come. That said, we need to build on this good idea and ensure that the way we position ourselves in the marketplace, our business plan, our pricing model, all stay relevant.

■ As we continue to look to the future, we have an evolving framework involving the use of ReServists skills and talents in locations where there is not a bricks and mortar office. The use of technology including our Opportunity Board and Salesforce allows for remote impact. [**CLICK HERE TO LINK TO THE POWERPOINT PRESENTATION**](#)

BREAK/NETWORKING SESSION

During the extended break, Conference Facilitator, Lorrie Lutz, Chief Strategy Officer of Fedcap, asked participants to write on the walls - literally - in response to the question:

“As we collectively evolve our vision, what can we do to expand and enhance ReServe?”



Laura Traynor, Director, ReServe New York/
Community Impact Institute



Noelle Minter, Assistant Director, ReServe New York with Encore Fellow, Betsy Werley



Betsy Conrad, Assistant Director, ReServe New York



ReServist, Nancy Moorhouse

Some of the suggestions included:

- Measure Impact in specific ways
- Collect Stories–Building Profiles of ReServists
- Create a more dynamic website
- Build ReServe community through conversations with Advisory Boards, ReServe Affiliate Directors, and ReServists.
- Provide more outreach to corporations, unions, government, HR professionals
- Branding: Raise the Profile!
- Develop community partnerships based on understanding community needs
- Storytelling from the Community Partner’s Perspective

LUNCH DISCUSSION: Engaging Advisory Boards that Make a Difference

Ann Machado began the conversation by sharing why she became involved as a ReServe Advisory Board Member. Ann described that the genesis for ReServe Miami was a Wall Street Journal article that sparked a conversation between Ann and her colleague, Debi Hoffman that led to two years of planning for a new ReServe affiliate!

Ann went on to describe the process and importance of building the ReServe Advisory Board—one that requires plenty of tenacity. “What was interesting (albeit frustrating) was that the first five people we asked said “no.” But because they loved the concept so much, they wanted to help in other ways, such as making connections to foundations, community partners and media exposure. So for a while, the Advisory Board consisted of Debi and me.”



Ann Machado,
President Creative Staffing Solutions
and ReServe Miami Advisory Board Member

Today ReServe Miami has an active 15 member Advisory Board and an array of strong partners and “friends”. Ann recommended that the process of recruiting advisors be very intentional. It is important to understand the community, their needs, their priorities and then recruit individuals who have connections and knowledge in these areas. It requires a mix of “who you know” and people with hands that reach far and deep and that can be serve as a resource for the affiliate director.

Further, keep people who are busy and connected engaged. ReServe profiles and stories of their impact are critical to keep them involved. It requires detailed planning, meetings with specific agendas and focused “asks”. ReServe Miami advisors meet on a quarterly basis and they regularly engage with the ReServe Director, Dacia Steiner, around opportunities to grow and expand the affiliate.

SESSION 4: ReServe Affiliate Panel

The afternoon panel discussion was designed to understand from the learning of the ReServe Affiliates.

Question: After several years serving as the lead for ReServe in your jurisdiction, what has surprised you?

CAROL indicated that she was most struck by the power of possibilities and the amazing impact of the work! She also said that she was surprised with the amount of education involved when working with partner organizations, helping them to understand this wonderful asset that exists in the community and at the same time educating ReServists about the possibilities that exist for them.

BRANDEN indicated that he was surprised about the importance of helping organizations refocus on their priority areas. Sometimes they really do not fully know what they need.

KEVIN agreed that partners might not have a clear idea about what they want or what ReServe is.

DACIA indicated that Miami is a unique community - 75% of the people are not from Miami & are “snow birds.” She was surprised by the amount of time spent thinking about how to drive interest in community engagement. A strategy used by ReServe Miami was to create a 14-page asset map that identified organizations already catering to the ReServist demographic.



Carol Greenfield- Boston



Kevin Donahue- Newark



Branden McLeod- Maryland



Dacia Steiner- Miami

Question: What have you learned about the art of matching ReServists with community organizations?

KEVIN talked about the fact that matching is an art, not a science and that using First Impressions is a critical opportunity to engage ReServists about who they are and what they aspire to be. “If you can engage on that level, its gold all around.”

Question: Have you ever had matches that have gone completely sour and what did you learn from those experiences?

BRANDEN discussed that it is not always clear why it happens. Sometimes it is personality, sometimes it is agency culture. The more we get to know the community organizations the more successful we are in placements.

CAROL indicated that flexibility is born of these connections—and that is important. She shared that they had a ReServist that worked with Big Brothers/Big Sisters to recruit little sisters. They soon realized that she was better at vetting big sisters and eventually, they hired her to join as staff.

She also highlighted the importance of getting to know the ReServists.

Question: Building on that, what kind of ongoing interactions do individuals that do the matching have with ReServists?

CAROL emphasized that good things happen through connections. Boston ReServe holds gatherings called ReServe Connections. During these interactive gatherings there is no formal agenda but simply an opportunity to connect. Flexibility helps, from ReServe, ReServists and Partners.

DACIA loved that idea and indicated that these meetings develop social capital and “good will,” and provide opportunities for ReServists to remain engaged so they don’t get frustrated while waiting for a placement. It also might be effective to offer other volunteer opportunities from partner organizations, host a potluck luncheon or resume-writing party, and encourage them to remain engaged outside of ReServe.

Question: 10,000 people hit 65 daily until 2030. This is a huge demographic reality that will impact every community based partner. Do you have a marketing strategy around inviting partners to sessions to think through how they can build/ embed ReServe into their strategic plan?

DACIA indicated that she asks partners “What keeps you up at night?” From there, conversations ensue that in my experience lead to opportunities. Equally as effective is approaching members of the Chamber of Commerce, many of whom sit on nonprofit boards, appreciate Return On Investment and will advocate for ReServe to boards.

CAROL responded that one of the most effective ways to promote ReServe among partners is to bring ReServists to community gatherings with partners and let them work their magic! Once they see the abilities of ReServists, partners come back for more. They also provide referrals for other nonprofits. ReServists are a GREAT referral source for partnership development, can inspire community organizations around how ReServists might be integrated into their long term strategic planning.

KEVIN mentioned that several years ago there was a symposium in NYC- to introduce potential partners to ReServe that included over 75 nonprofits from the NYC area. This had tremendous impact and resulted in multiple placements.

Additional ideas that were generated from the conversation regarding effective use of ReServists includes:

- Create an “impact” area in the opportunity listing
- Do a national asset mapping
- Collaborate more across affiliates
- Seek national funding and opportunities

BREAKOUT SESSION 1: Building Sustainable Partnerships

Jack Rosenthal: Founding Chairman of ReServe

Maureen O'Connor : Senior Advisor for Education and Workforce Development at the Queens Library

Noelle Minter: ReServe Assistant Director

Betsy Conrad: ReServe Assistant Director

OVERVIEW: ReServe New York City has enjoyed a rewarding partnership with NYC government and the Queens Library which have been pivotal to its growth and sustainability. Jack Rosenthal, who was a conduit to the partnership with NYC government and Maureen O'Connor, participated in a panel discussion with Noelle Minter - who manages the NYC government contract, and Betsy Conrad, who has worked closely with Maureen on program development and placements at Queens Library.

SETTING THE STAGE: In 2007, ReServe responded to a NYC Department for the Aging (DFTA) Request for Proposal to develop a systematic civic engagement program for older adults within the city agency system.

DFTA awarded ReServe an initial \$1 million contract for one year, with the option of two annual extension amendments. The current extension amendment allows for city agencies to collectively spend a maximum of \$3.2 million over a 2-year period. Since 2007, ReServe has made 765 placements at 24 City agencies. ReServists fill all types of roles including childcare associates with Human Resource Administration, customer services representatives for Vital Records in the Department of Health, and human resources & operations analyst with the Department of Education.

The Queens Borough Public Library: For the past four years, ReServe has been worked with the library to place ReServists throughout their many branches. ReServists assist library staff and customers by participating as coaches and program assistants in the adult and family literacy programs, job information center, services for new Americans, and specialized services for homebound elderly, like “mail a book.” The Library has provided training for ReServists in a number of areas including tutoring, GED test prep, conversational instruction, community resources and financial education so that they can best assist library patrons. Grants from private foundations and AmeriCorps have offset the costs of running these programs.

After describing the evolution of the relationship, some of the critical discussion “take aways” included:

When building partnerships, start at the top: Jack Rosenthal explained that Linda Gibb, former Deputy Mayor of Health and Human Services was interested in tapping into the service of the “well elderly” and the mayor hosted a reception for 750 ReServists at City Hall. They also started at the top to address potential concerns about union jobs - meeting with labor leader Victor Gotabaum - and telling him how ReServe was an opportunity for retired union employees too.



Session led by Jack Rosenthal, Founding Chairman of ReServe and Maureen O'Connor, Senior Advisor for Education and Workforce Development at the Queens Library



Noelle Minter, ReServe Assistant Director, Jack Rosenthal, Betsy Conrad, ReServe Assistant Director, Maureen O'Connor

Find a champion: When ReServe first approached the Queens Public Library, Maurren O'Connor, its chief operating officer at the time, supported the model from the get-go. She promoted ReServe within the library, identified appropriate roles for ReServists, and educated colleagues and staff about how to work with ReServists.

Fill a gap: during the economic recession, libraries were being asked to do more with less. ReServe helped the library boost its capacity in key areas, like job information centers.

Breakout Session 2: Intergenerational Work at Its Best

**Dr. Roque Gerald: Senior Vice President,
Fedcap's Education Practice Area**

**Blake Heller: Project Manager,
Education Innovation Laboratory at Harvard University**

Dacia Steiner: Director, ReServe Miami



Dr. Roque Gerald



Blake Heller



Dacia Steiner

SETTING THE STAGE: Multi-generational work is one of the most compelling social impact areas of ReServe. Three innovative approaches were discussed.

PrepNOW!™: Dr. Roque Gerald discussed the reality that

each year, about 25,000 youth age out of the nation's foster care system and move from a highly regulated environment into to an adult world that is both unstructured and unsupportive. A small number of these youth beat the odds and get into college, graduate and secure steady jobs with decent pay and benefits, find stable housing and steer clear of the criminal justice system. However, most are far more likely to flounder and their outcomes are poor as depicted below:



- Only 48 % work with any regularity;
- 48% of youth leaving the child welfare system do not have a high school diploma;
- A significant number of youth transitioning from care will earn a GED rather than a high school diploma and yet GED recipients are substantially less prepared for college than high school graduates, less likely to meet college proficiency standards at entry, more likely to leave college after the first semester and have lower chances of graduating.

The post-secondary statistics are especially troubling. While 70% of youth in care say that they want to go to college, only 10% enter college and of those, fewer than 3% graduate as compared with 24% for the general population.

Fedcap is changing this story with a bold national initiative to create a college-going culture within foster care. **PrepNOW!™** is a web-based curriculum and interactive learning tool was designed to enhance the capacity and motivation of caregivers to prepare youth in their care for college. At least 20 ReServists have been recruited and trained to assist 400 foster parents in learning the content of the PrepNOW! curriculum.

MS EXTRA: Blake Heller went on to describe the three-year, \$20 million Middle School ExTRA program, which extends the school day by 3 hours for about 2,000 sixth grade students at 20 low-performing New York City schools. The students are given an extra hour of academic instruction in the form of small-group literacy training, and also participate in an hour of hands-on activities such as filmmaking, yoga, dancing, gardening robotics, videos and martial arts. The Middle School ExTRA program builds on successful Harvard EdLabs pilot programs in Houston and Denver that focused on improving math skills.

Middle School ExTRA, which began in September 2013, is being run by the New York City Department of Education and the City Council; organizational partner The After-School Corporation (TASC); research partner Harvard EdLabs, and a host of community and private partners. ReServe New York has placed more than 100 “ReServists” in the schools to serve as reading tutors, leading two classes per day with four students per class. After a successful first year, the partners are gearing up for year 2 and are expanding the program to include seventh grade students. A full study will be published after the completion of the three-year pilot. The current cohort of students will be followed through to the completion of 8th grade. Progress will be measured through standardized testing and through assessments performed by tutors during the course of the year.

READY! Dacia Steiner discussed the fact that in 2009, ReServe created READY! to marshal the power of ReServists from varied professional backgrounds to help increase high school graduation and college acceptance rates for disadvantaged youth attending under-resourced secondary schools, and help them stay in college. ReServe, backed by national studies demonstrating the decisive impact of “college mentors” who supplement the work of high school guidance counselors, launched READY! (ReServe’s Education, Advancement and Development for Youth). READY! is providing important services to a large number of youth in schools across New York City, Newark and Miami.

In the 2012-2013 school year, READY ReServists provided critical support to more than 3,400 NYC high school students; helping 925 students complete their college applications; and assisted 1,330 students with FAFSA and Tuition Assistance Program applications. Last year, ReServe expanded services to students from five high-need high schools through an innovative “looping strategy,” which extends the relationship between ReServists and students through their freshman year in college. Once youth graduated from high school, these READY ReServists changed their role to one of a College Readiness Success Mentor, where they support youth to ensure they matriculate and complete their freshman year of college. READY also informed the development of a new impact initiative, PrepNOW!™, which creates a college going culture in foster care families. The READY “looping” strategy and PrepNOW! are in a pilot phase and outcomes will inform the model for expansion to other affiliates.

Question: You could have engaged volunteers, interns, grad students in your program - why ReServists?

Blake indicated that the power of the intergenerational work makes the concept of the use of ReServists extremely appealing for MSEXtra!, and it has proven to be tremendously effective. The main variable that they are seeing after one year of operation is that the quality of the relationship between students and ReServists is critical to student involvement and persistence

Roque indicated that he believes first and foremost that the reason PrepNOW!™ was funded by the Hilton Foundation was because of the use of ReServists. Foster parents are much more receptive to individuals who have life experience than those who do not. Second, he suggested that the success in the roll out of PrepNOW! in New York City is a direct result of the ReServist tenacity and commitment in engaging very busy foster parents.

Dacia went on to emphasize that the youth involved in READY! have responded very positively to the ReServists. The intergenerational work between students and ReServists is making a tremendous difference in the engagement of students.

¹ College Readiness of New York City’s GED Recipients: Report of the CUNY Office of Institutional Research and Assessment, November 2008

² Center for the Study of Social Policy, Chapin Hall and Partners for Our Youth Research Study. (2010).

WRAP UP SESSION

Facilitator Lorrie Lutz asked the audience to describe one key takeaway from the meeting - one thing they will do differently as a result of the conversation. This highly energized session resulted in the following responses:



Lorrie Lutz, Chief Strategy Officer Fedcap



Ann Machado, ReServe Miami, Co-Chair Advisory Board

- Break out of comfort zone and begin to leverage the full value of the ReServist message
- Leverage Reservists stories in multiple contexts to advance ReServe
- Work collectively to pursue national grants in social impact areas
- Look for like-minded partners to expand opportunities
- Explore the health care social impact area more thoroughly
- Create an asset map of older adult space and look for strategic partners
- Engage in more cross-conversation with Advisory Board members, ReServists and ReServe Affiliate Directors
- Talk about impact when describing ReServe opportunities
- Advance the self-assessment of ReServists
- Standardize resumes so that potential ReServists more fully describe what expertise they have and how they want to leverage this skill in their encore career
- Conduct a frequent “meet and greet” for ReServe partners and engage ReServists to tell their stories of impact.
- Think about our community based needs and more intentionally build the advisory committee



Deborah Sale, Chair of ReServe's Board of Directors



ReServe Board Member, Phyllis Segal



ReServe Board Member, Lois Wagh

 [CLICK HERE TO SEE THE VIDEOS OF THE CONFERENCE](#)

RESERVE WESTCHESTER: MIKE ISERSON

ReServist Michael Iserson is a veteran corporate recruiter who serves with the Foster Grandparents Program, which places low-income seniors in academic settings to work with young people as tutors and mentors. Mike planned and implemented volunteer recruitment strategies - making contact with 116 organizations and visiting 43 sites - and links hundreds of foster grandparents with field supervisors. He has significantly raised the organization's profile through numerous media placements and presentations.

"There just aren't enough words to describe how efficient and motivated Mike is, and his incredible work ethic and sense of responsibility," said Foster Grandparents Program Director Rosemarie Bahr. "He's an employer's dream."

RESERVE MARYLAND: HOWARD ZUCKERMAN

After a successful career as a senior finance executive, ReServist Howard Zuckerman virtually transformed the Patterson Park Public Charter School, a preK-8th grade charter school in Baltimore that serves 673 students. Howard implemented new financial reporting and compliance processes; identified cost-savings opportunities; negotiated an investment advisory agreement; streamlined quarterly reporting, and hired and trained an accountant/bookkeeper. The school, once struggling, is now thriving. "We were amazingly lucky," said Ed Rutkowski, the school's executive director. "Howard was the perfect person for us at exactly the right time."

"My motivation is to work with nonprofits, meet people in new walks of life and continue to learn," Howard said.

RESERVE GREATER BOSTON: DEBI GOLDEN

Debi Golden is a highly successful fundraising executive who has worked at major hospitals, schools and medical associations in Virginia and Boston, MA. As a ReServist, she is raising funds and building capacity for GRLZradio.org, a program of St Mary's Center for Women and Children in Boston that empowers at-risk young women through social, academic and media literacy training, and gives them a voice in the community. Debi analyzed the program's strengths, weaknesses, opportunities and threats; developed a narrative that builds a case for fundraising; created income streams, and spearheaded a major gifts program. "Her contributions are awesome and much appreciated," said Program Director Bernadette Reid.

"I think of ReServe as a new reality that opens up huge opportunities for growth," Debi said. "It's a different way to manage your time and use your professional and life skills."

RESERVE NEWARK: MARGO GREENFIELD

The New Jersey Institute for Social Justice, a research and advocacy organization for the state's urban residents is working on a new development financing instrument targeted at state educational institutions. It's a complex mechanism for social impact investors, and includes a bond referendum for capital construction in exchange for local hiring and sourcing. The Institute needed an experienced lawyer to move the project forward, but could it afford one?

Enter ReServist Margo Greenfield, who spent 34 years as a government lawyer with the National Labor Relations Board. Margo, whose placement was slated for 8-15 weeks but has been asked to stay on for a year, is Special Council for the project. "My whole career has been in public service, and I wanted to continue to do that," she said. "ReServe is a great vehicle for people with strong skills who want to keep working for social betterment."

RESERVE MIAMI: DORETHA NICHSON

Doretha Nicholson is a recently retired Strategic Planning/Social Enterprise/Administrative & Support Services professional with over 25 years of experience in the public and private sectors. An entrepreneur, she owned and operated Excel Elder Care Assisted Living Facilities and Nicholson Insurance Companies. She has significant volunteer and community organizing experience, and worked as a Peace Corps volunteer in Nigeria.

Doretha has been an AmeriCorps READY ReServist for the past three years and recently accepted a new placement as a Community Relations Specialist for the Center for Family and Child Enrichment. She shows no sign of slowing down. For her 80th birthday last year, she rappelled down 19 floors as part of the "Over the Edge" fundraiser for the Miami Children's Initiative. "Ms. Nicholson is an asset to the program," said Tanya Young, AVID Lead Teacher/Site Supervisor, for Doretha's AmeriCorps service. "She has a passion for advocating for our children and uses every opportunity to encourage them to work up to their full potential."

RESERVE NEW YORK: MARY SHEA

Mary Shea, a Registered Nurse with 35 years of experience, served as a ReServist with the National Kidney Foundation, allowing her to do what she loves best - work directly with patients - while providing critical pre-screening for kidney disease. She also served as an on-site nurse at the Bernard M. Baruch Houses, a major New York City retirement community, where she took residents' vital signs, reviewed medications and scheduled medical appointments. She organized workshops on home safety, hypertension and medication protocols, and worked hard to gain the trust of residents, many of whom did not speak English.

"Working with patients is something that has always been close to my heart," Mary said. "As a nurse you have so much knowledge that you want to share, and ReServe lets you do that."

RESERVE SOUTHEAST WISCONSIN: SIG TOMKALSKI AND MIKE STAFFORD

In 2013 Wisconsin Bike Fed, an organization that promotes bicycling in the Badger State brought in ReServist Sig Tomkalski, who had 30 years of high-level managerial experience with a medical advocacy organization to help develop a new organizational plan. Sig helped Bike Fed evaluate its structure and optimize its resources and human capital to more effectively carry out its mission. He was so successful that former Bike Fed Executive Director Kevin Hardman brought in a second ReServist, Mike Stafford, a Certified Public Accountant, to streamline the group's accounting policies and procedures. Mike restructured bookkeeping and accounting systems, and trained a staff member to serve as Bike Fed's bookkeeper.

"The ReServists did amazing work for us and helped keep us rolling," said Bike Fed Deputy Director Dave Schlabowske. "For a very small fee we got extremely high-level and experienced individuals who helped us in so many ways."

RESERVE BOARD OF DIRECTORS

Greg Farrell
President Emeritus
Expeditionary Learning
Member since: June 21, 2013

Linda P. Fried MD
Dean, Columbia University
Mailman School of Public Health
Member since: October 27, 2010

John A. Herrmann
Vice Chairman
Lincoln International
Member since: February 1, 2006

David R. Jones
President & CEO
Community Service Society of New York
Member since: November 1, 2005

Kathleen Kelley
Member since: October 18, 2005

Jay B. Martin
Partner
Manatt, Phelps & Phillips, LLP
Member since: June 27, 2012

Alison Pavia - Secretary
Member since: February 14, 2007

Dan Reingold
President
The Hebrew Home for the Aged
Member since: June 23, 2010

Jack Rosenthal
(Executive Committee)
President Emeritus
The New York Times Company Foundation
Member since: March 2, 2005

Phyllis N. Segal
Vice President
Encore.org
Member since: June 23, 2010

Herb Sturz
(Executive Committee)
Senior Advisor,
Open Society Foundation
Member since: March 8, 2005

Lois Wagh
Member since: October 3, 2005

Solomon B. Watson IV
Member since: June 24, 2008

Michael M. Weinstein
Treasurer (Executive Committee)
Chief Program Officer
Robin Hood Foundation
Member since: March 8, 2005

Deborah Sale
Chair (Executive Committee)
Member since: March 5, 2014

FEDCAP BOARD OF DIRECTORS

Mark O'Donoghue, Board Chair,
Partner in the law firm of Curtis, Mallet-Prevost, Colt & Mosle

Diane Shaib, Vice Chair
Executive Vice President at Orbiscom, Inc.

Laurence Ach, Treasurer
Senior Vice President, Klingenstein, Fields & Co.

Judy Bergtraum, Secretary
Deputy to the Vice Chancellor, Office of Facilities Planning,
City University of New York.

Peter Aschkenasy

Neeraj Bewtra

Phillip Caprio, Jr.
Private investor and consultant

Paul Davis
Principal of the Marble Harbor Investment Counsel

Anoop Dhakad, CFA
Partner of the firm and Head of Marketing for MKP Capital

David Edwards
Managing Director and Head of the Global Corporates,
Standard Chartered Bank

Richard Fursland
CEO BritishAmerican Business

Diana Glass

Félix Matos Rodriguez
President of Eugenio María de Hostos
Community College of CUNY

Lynn Morgen
Founding partner of MBS Value Partners

Janice Oursler
Program Director, Rehabilitation Counseling,
University of Medicine and Dentistry of New Jersey

Peter Panken, Past Chair
Member of the law firm Epstein, Becker and Green

Gerry Prothro
Managing Director and owner of IKT Investments Ltd.

Kenneth Raisler
Head of Sullivan & Cromwell's Commodities,
Futures and Derivatives Group

Michael Rendel
Medical Director, Global Head of Wellness Goldman Sachs

Peter G. Samuels
Partner in the Corporate Department of Proskauer

Martha Sproule

Ann Thayer

Alan Towbin

Jeanne Townend
Senior Vice President of Health, Education
and Social Programs ICF International

RESERVE ADVISORY COUNCILS

ReServe Greater Boston

Doug Dickson
Lead Senior Consultant
Encore Boston Network New Directions, Inc.

Barry Dym
Founder and Director
BU Institute for NonProfit Leadership

Michael Festa
Mass State Director, AARP

Deborah Golden
ReServist, ReServe Greater Boston

Christine Green
Executive Director
Trefler Foundation

Serena Powell
Executive Director, CWS,
SVP, New England, Fedcap

Mary Reed
President, Ex-Officio
Bessie Tartt Wilson Initiative for Children

Phyllis Segal
(Founding Chair of Advisory Group),
Vice President, BIDMC

Lisa Zankman
Retired Sr. Vice President HR, BIDMC

ReServe Maryland

Michael Marcus
Chairman, Director of Older Adult Services,
The Harry and Jeanette Weinberg Foundation

Deborah Adler
Director of Admissions
and Community Relations Copper Ridge

Dayna Brown
Administrator,
Howard County Office on Aging

Sandra Cobb
Chief of Human Resources,
Maryland Department of Aging

Reba Cornman
University of Maryland Baltimore,
Director, Geriatrics and Gerontology,
Education and Research

Jim MacGill
Association of Baltimore Area Grantmakers

Ilene Rosenthal
Program Director at Alzheimer's Association,
Greater Maryland

Wendy Shaia
Director of the Social Work
Community Outreach Service,
University of Maryland School of Social Work

ReServe Miami

Sheldon Anderson
President/CEO, S.E. Region, Northern Trust Bank

Tony Argiz
CEO/Managing Partner,
Morrison Brown Argiz Farra

Helen Aguirre Ferre
Opinion Page Editor,
Diario Las Americas, Host, "Issues"

Regina Frazier
Past National President of Links

Debi Hoffman
Advocate & Community Builder Extraordinaire

David Lawrence
Former publisher of The Miami Herald,
Child Advocate

Aida Levitan
President, the Levitan Group

Ann Machado*
President/CEO, Creative Staffing

Gepsie Metellus
Executive Director, Sant La

Max Rothman
President & CEO, Alliance for Aging, Inc.

David Saltman
Visiting Instructor, School of Social Work, FIU

Katy Sorenson
President, UM Good Government Initiative

Dolores Sukhdeo
Executive Vice President & COO,
Channel 2 WPBT

Peter Wood
Vice President of Programs,
& Community Investments
Health Foundation of South Florida

Virginia Aponte
AmeriCorps Program Manager (ReServist)

Bart Mondell
Program Coordinator

ReServe Milwaukee

Christopher Abbott
Executive Director, United Healthcare of Wisconsin

Melanie Holmes
Vice President, World of Work Solutions,
Manpower Group

Stanley S. (Stan) Jaspan
Partner, Foley & Lardner LLP

Steve Marcus
Chairman of the Board,
Marcus Corporation

Scott Gelzer
Executive Director
Faye McBeath Foundation

Mary Lou Young (or her appointee)
President and CEO,
United Way of Greater Milwaukee

ReServe Newark

James Abruzzo,
Rutgers Institute for Ethical Leadership

Ross Danis
Newark Trust for Education

Sam Delgado
Verizon Foundation

Cornell Brooks, Esq.
NJ Institute for Social Justice

Tanya Mitchell
Newark Alliance

Mark Valli
NJ After 3

Sponsored by

BrooklineBank

reserveinc.org • fedcap.org