

An Encore for Nonprofit Leaders

Making the World a Better Place, Continued

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EXECUTIVE SUMMARY

Many Americans say they'd like to "give back" when they retire. But nonprofit leaders have been giving back for years. What lies ahead for them as they approach traditional retirement age and contemplate leaving their jobs?

This paper explores the paths taken by several nonprofit leaders who – though they thought about retirement in a variety of ways – ended up deciding to transfer their extensive experience to other personally meaningful, paid work that benefits society. They opted for encore careers.

To nonprofit leaders in this stage of life, these professionals offer advice and insight about the transition. There's no universal pattern, but there are common considerations. In moving into their encore careers, the former nonprofit leaders said they felt an ongoing drive to serve society and to feel useful. The love of the work and its value to others mattered. In most cases, so did income.

At the same time, the former leaders wanted more flexible lifestyles. They spent years of their lives in high-stress, high-responsibility positions that often consumed too many hours. Plus, they wanted to continue to have a shared purpose with others and belong to social networks with like-minded people. As one put it: "The work does not have to be all-consuming to be meaningful."

These professionals chose (or are seeking) encore careers that paralleled their midlife careers. The new roles included interim executive director; executive director of a smaller nonprofit with a different mission; social entrepreneur; and consultant. In addition, there are other encore possibilities open to former leaders, such as a new position in the same organization; a job with another nonprofit; teaching or coaching; and community leadership.

This new phase requires planning. But with no clear, systemic support for people making the change, the former nonprofit leaders had to find their own way. They read books, took self-help exercises and assessments, evaluated their finances and kept up with their professional fields through courses and programs. One had a positive experience with a personal coach. Friends and spouses helped them think through their transitions. Their professional networks and colleagues – as well as volunteer work – opened new opportunities.

Nonprofit leaders considering retirement could benefit from more structured help, such as programs, materials and other resources to guide them to different kinds of work that helps others. Organizations and communities that support encore careers for their nonprofit leaders stand to gain immeasurably.

Nonprofit leaders considering retirement could benefit from more structured help.

INTRODUCTION

The prospect of an encore career – working for a good cause in the second half of life – liberates boomers to imagine a compelling alternative to conventional retirement images of travel and leisure or menial post-retirement jobs.

Most of the stories about moving into a new stage of meaningful work focus on people who have spent their work lives in corporate and business careers and long for something more soulful, something that better expresses their values than their midlife careers. Articles and first-person accounts in popular print and online publications suggest that those leaving their midlife work are looking to the nonprofit and public sectors, often in their own communities, to find or invent work that meshes with their principles. The 2008 MetLife Foundation/Civic Ventures Encore Career Survey found that most of those who have transitioned to encore careers work in education, government, the nonprofit sector and health care.¹

But what happens when those who already have enjoyed nonprofit careers in meaningful and mission-driven work begin to look to their next chapter? They purposefully chose service or social justice work, often for less money and fewer benefits than they might have earned in the private sector. Regardless of their specific professional expertise (law, social work, education, medicine, finance, administration, etc.), they picked work that was fundamentally about making the world a better place, rather than profit.

This paper grew out of a June 2009 meeting Civic Ventures and the Building Movement Project convened with support from MetLife Foundation. That gathering, called Crossing Generations: Retooling the Nonprofit Workplace, brought together a multigenerational group of nonprofit leaders to address how organizations can realign their practices to attract and retain a harmonious work force spanning four generations.

With that focus in mind, this paper looks at what happens when long-term nonprofit workers are ready for a new stage of life – what they want to do next and how they navigate the transition. In particular, what does an encore career look like for someone who is not switching sectors? There has been some important work already done in this area. In *The Departing: Exiting Nonprofit Leaders as Resources for Social Change*, Jan Masaoka set out to “fill the gap in current knowledge about the post-executive director leadership opportunities ... [to] leverage the skills and relationships of high-performing executives to benefit the broader field long after their executive director tenures end.”² Mark Leach looked more specifically at founding directors who remain at their nonprofits in new roles after stepping down in *A Table for Two: Founders and Successors in the Same Shop?*³

What happens when those who already have enjoyed meaningful and mission-driven work begin to look to their next chapter?

This paper is aimed at both deepening this knowledge and expanding the inquiry to a wider group of nonprofit leaders. It seeks to discover the patterns among their stories and experiences and to help others make the shift. It is based primarily on interviews with nine people, most in their 60s, about their transition journeys after “exiting” (as Masaoka puts it) their executive or management nonprofit jobs. The research also included a literature review. Each person interviewed had held leadership positions as chief executive, as senior manager or in a professional role. All are either already in or actively seeking encore careers, and all saw the closure of their prior roles as retirement rather than simply a job change. One person explained why she referred to her transition as “retiring,” even though she was just in her 50s:

“I felt it was retirement because retirement is about control, and that is what I was seeking. I had worked so long as a senior manager in a highly controlled culture, so my time was never my own. Having to act in certain ways because of my job and public image even constricted personal choices like putting a bumper sticker on my car. To me, retirement meant: I get to pick. I get to set my schedule. I get to say `no.’”

This paper looks to gain insights into the nonprofit leadership encore transition, not to define a typology or prove universal patterns. The small sample of individuals interviewed was not designed to be representative⁴ or to provide the type of quantitative data that could be gleaned from a large survey. By focusing on people who held leadership roles, the paper does not address the transitions of the vast majority of nonprofit workers. However, understanding that nonprofit leaders may continue to have a social impact through encore careers could inspire other nonprofit employees to do the same and encourage further research and action to harness this experienced talent for addressing society’s needs.

Personal circumstances helped all the leaders realize the complexities of retirement.

REJECTING A LEISURELY RETIREMENT

Most of those interviewed described eagerly anticipating spending time relaxing, ignoring the alarm clock, traveling, enjoying friends and families and recovering from the high-intensity stress that their jobs had involved. In all cases, however, the desire for a retirement lifestyle centered on relaxation and recreation dimmed quickly.

For some, there was a nearly instant recognition that balancing life between leisure and a new work challenge would be better than complete leisure. For others, it took up to two years to figure out they wanted such a balance. Personal circumstances helped them all realize the complexities of retirement:

- For one, the decision to retire was followed quickly by an ultimately fatal illness of her spouse, which changed her assumptions of what retired life would be.
- Another experienced the deaths of two close friends, which intensified her own dreams about being free before she, too, lost her chance.
- Another had responsibilities caring for fragile parents.
- For some, financial assets – especially with recent economic downturns – could not support extensive travel and a leisure-driven lifestyle.
- Some were used to hard-charging and extroverted work styles, and they just missed work and the people.
- One, who retired after a heart attack, knew she couldn't afford total retirement, nor could she handle the stress of a full-time commitment.

Regardless of the path taken, all of those interviewed came to the conclusion that they wanted to begin a new stage of work that offered social impact, personal meaning, continued income (for most) and more flexibility and personal time. All of them had left social-purpose careers they loved and work they found meaningful, and they wanted no less in their next chapters. At the same time, none of them wanted the same levels of responsibility and stress. They wanted flexibility in their work schedules and to set the terms for the work. Generally, they preferred part-time work, yet most were willing to consider jobs requiring nearly full-time or flexible full-time commitments, if the opportunities strongly matched their interests and goals.

PURPOSE, MONEY, COMMUNITY AND FREEDOM

These former nonprofit leaders are all in, or attempting to transition to, encore careers in which they can continue working in ways that have social impact. The resounding explanation is their ongoing drive to serve society and fulfill their own desires to be useful. All of them ranked “personal meaning and fulfillment” and “serving others” as the most important criteria for the kinds of encore opportunities they preferred. The love of the work, and helping others, were essential.

A higher education association leader described his deep-seated values about responsibility:

“I feel pressured to continue working through a sense of obligation. My father was one of 13 children, and he was the only one who graduated from high school. But all of his children and grandchildren have achieved advanced education. I feel like I owe society for my education. I need to pay back. So if a college or university needs somebody ... I will go and do that work. It is the right thing to do.”

Another former nonprofit leader, who is trying to start a new social venture, explained, “I have so much energy and experience. I want to make a difference.”

Even though most of the leaders wanted to find work that would provide income, none were eager to consider a job *just* for the money. They confided that there were economic concerns that compelled them to seek paying jobs rather than solely volunteering, yet none of them listed money as the top motivator. As one explained:

“Originally I wanted to go back to work for economic reasons. The economy was beginning to crash just as I retired, and that was scary. But that has shifted as I have settled into retirement and figured out how to manage resources. Now it is more about wanting to be relevant and keeping my hand in the work world.”

All of those interviewed left CEO, senior leadership or professional jobs and had some retirement reserves. But for most, those savings did not guarantee financial security. The women leaders interviewed were most explicit about this concern. As one explained, “I feel pressured by economic concerns right now. I have an individual retirement plan, but my savings have diminished in the economic crisis.”

Most of the leaders wanted to share a common purpose with others and belong to social networks with like-minded people.

Beyond social purpose and income, most of the leaders wanted to share a common purpose with others and belong to social networks with like-minded people. For example, a museum administrator who retired believing she would devote herself full time to glassmaking found herself longing to go back to her previous work, though not the same job. She reflected:

“Two friends my age died suddenly before I retired, and their deaths really affected me. I had often thought I should try to be an artist again. Thinking about the shortness of life, I decided when I left my job to go back into glassmaking. I pursued it but learned some interesting things about myself in the process. I know now that I’m not somebody who thrives on the solitary nature of being an artist. I discovered how much of a people person I am. I missed interaction with people. I realized how much I love museum work, and I’m searching for a way to do that work but preferably part time or through job sharing. This is not easy to find.”

Among the strongest motivators for transitioning to an encore career is the desire for a more flexible lifestyle. The primary distinction between then (the midlife career) and now (the current or desired encore career) is the prospect of more balance and freedom. Nearly all of the retirees associated freedom and flexibility with retirement. None wanted to replicate the high stress of their midlife careers, whether they ultimately chose to work part time or full time. They explained:

- “The greatest joy of this second life is the ability to make more personal choices. I had such a wonderful career. But I’ve had my nose to the grindstone all my life. Now having the flexibility to choose is such a great joy.”
- “My first encore career was motivated by economic concerns because I didn’t really start seriously saving until my mid-40s and because of the downturn in the economy. But I was also totally committed to working with balance.”
- “As a single mom, I never had time to spend real quality time with my children and family. Using some of the freedom of retirement to be with my children and grandchildren has been very rewarding.”
- “All my professional life I was haunted that somebody would just find me out. They would find out about my humble beginnings and judge that I had no business being a university president. But I did it, and nobody stopped me. Now – by choice – I can either plant flowers or go and be an interim CEO. I’ve never had so much of a sense of freedom.”

Those sentiments mesh with the results of the MetLife Foundation/Civic Ventures Encore Career Survey, which found a strong interest among people age 44 to 70 in finding work that provides purpose, flexibility and continued income. Those interviewed for this paper and those in the national survey said they consider using their experience to help others important, as well as being able to take time off from work for personal reasons.⁵

ENCORE CAREER CHOICES

The encore careers held or sought by these former nonprofit leaders closely paralleled the *type* of work they did in their midlife careers, though the encore careers presented much more flexibility in time, schedule and scope of work. Plus, encore work presented possibilities for them to use their most seasoned skills. The leaders felt that it was more effective to apply their existing skills rather than learn a different set of skills.

None of the people interviewed wanted an encore career significantly different from previous work, though most wanted enough differences to make encore choices interesting and to meet a desire for balance. One person summed it up this way: “There are elements of what I did in the past that I loved: international travel (but I don’t want to continue to do it 50 percent of my time); problem-solving (but I can transfer this skill to many contexts); strategic thinking.” Another added, “I don’t really want to continue doing what I’ve been doing, but I also don’t want something that is opposite of what I know.”

Encore career roles these nonprofit leaders chose include:

- Interim executive director
- Nonprofit executive of a smaller organization with a different mission
- Social entrepreneur
- Consultant

Pursuing interim executive roles

Three of the retirees transitioned to working as interim executive directors in high-responsibility, high-impact roles that offered the flexibility of working for defined time periods. In general, “interim executive directors are highly skilled managers who temporarily take the helm of an organization (four to eight months on average), help the board and staff address important systems and capacity issues and lay the groundwork for the permanent leader’s success,” according to CompassPoint Nonprofit Services, a San Francisco-based nonprofit support center that runs an interim executive director program.⁶

All three nonprofit leaders were helped by formally structured interim executive director programs with training and placement. Such programs are being developed in different parts of the country, including – besides San Francisco – New York and Chicago. The programs typically are based on or share common characteristics with corporate executive interim placements.

These leaders served as interim CEOs:

Then – Education association leader who previously held two university presidencies and other higher education management roles

The journey – Everybody advised him to take “down time” when he retired, but he quickly turned to substantial volunteer roles that allowed him to pursue many unfulfilled interests, including service to the U.S. Botanic Garden and tutoring children through a neighborhood association. But he also felt politically motivated to change higher education and decided to pursue interim CEO roles in that area.

Now – He became interim president of the Registry for College and University Presidents, continuing to use his executive skills in ways that have allowed him to take risks and bring real change.

Then – Regional leader in a Girl Scouts council

The journey – With her husband, she moved from an urban to somewhat rural area because they wanted to live in a beautiful environment for their retirement. But it is an area where there are few work opportunities.

Now – She has been part of the Girl Scouts of the USA interim CEO program and has had several short-term assignments plus a long-term one that lasted 2½ years. In her new locale, she is finding the travel for

assignments for interim roles more difficult and also is experiencing a shortage of opportunities.

Then – Executive vice president of the National Center of the American Heart Association

The journey – Immediately after retiring, she consulted for the heart association and generally wanted to consult for nonprofits and teach. She wanted to travel more with her husband, though he became ill soon after she retired and died 16 months later. During his illness, she joined the Executive Service Corps of Chicago (ESC) interim executive program.

Now – Her relationship with the ESC program allows her to take on demanding assignments that use her considerable skills. Her first interim assignment – at a nonprofit that supplies art resources to schools – lasted 10 months.

Becoming a nonprofit executive elsewhere

Most of the former nonprofit leaders expressed some conflicting feelings about encore careers requiring the same executive responsibilities as their midlife careers. However, they also believed that if the right opportunity came along they would be willing to return to a permanent CEO role, particularly if the nonprofit was smaller or had a different mission. One person made that transition:

Then – President/CEO of a child services agency

The journey – He guided the child services agency through a healthy startup and long-term growth. He retired in his 50s, and after 1½ years of leisure, motorcycling and fishing in his new hometown in Florida, he decided that “it just wasn’t enough.” At his daughter’s urging, he began volunteering for a local Habitat for Humanity chapter. He joined the chapter’s board and later accepted the CEO position.

Now – Contrary to his expectations, he is working more than full time. Both the salary and scope of the job are smaller than his midlife career. But he is thrilled with the role and finds it fun that Habitat is so grassroots and so dependent on volunteers. As he did before, he is substantially building and growing his chapter.

Creating a startup

For some an encore career is the perfect opportunity to create something new; to find and serve an unmet need; to put entrepreneurial skills to work for the greater good. These are people who start new programs or organizations. Some find partner organizations to support their efforts while others work independently to find funding.

The social entrepreneurial instincts of experienced adults have been recognized through The Purpose Prize, which gives five \$100,000 and five \$50,000 awards annually to social innovators over 60 in encore careers. Most of the winners have

launched their own nonprofits or other social enterprises. The Prize is part of the Encore Careers campaign of Civic Ventures, a nonprofit think tank on boomers, work and social purpose.

“In tough economic times, we need more creative solutions to long-standing social problems,” said Marc Freedman, CEO of Civic Ventures, co-founder of The Purpose Prize and author of *Encore: Finding Work That Matters in the Second Half of Life*. “It’s reassuring to note that as America ages, we have creativity in greater abundance.”

The entrepreneurial option was chosen by three of the leaders interviewed:

Then – Founder and executive leader of nonprofit associations related to the automobile industry

The journey – He began creating nonprofit organizations in the 1980s and has created 14, most of them industry associations whose missions were to set better standards, save lives and reduce injuries related to automobile equipment and services. After his first experience reducing fatalities and injuries, he realized he had created a way to save lives.

Now – He continues to found organizations, though on a smaller scale than during his midlife career.

Then – Health administrator at a small, nonprofit women’s hospital

The journey – After retiring, she took off several years to travel and spend time with family. Though she remained an active volunteer, she became bored with retirement. She saw unmet needs in her community and became especially motivated by the needs of seniors.

Now – She is in startup mode, raising funds and creating partnerships to launch a new social service program for underserved seniors in her region.

Then – Program manager handling community leadership development for a major private foundation (after a career as a community civil rights leader who held a state-level political office)

The journey – In the last phase of her midlife career, she accepted an assignment from her foundation employer to manage a regional development program in a part of the country where she had family and hoped to retire. After several years in that role, her visibility increased, opening many transitional opportunities. In her first encore career, she co-founded a new graduate degree program in public service and a center for developing regional community philanthropy based in a major state university system. When her first encore career role expanded to include teaching, she found herself working full time and decided it was too much.

Now – She is in her second encore career as an entrepreneur – this time as a consultant to a community foundation assigned to starting up a community development and philanthropy project.

Consulting

Consulting for nonprofits offers both flexibility and high-level challenges. Some retirees choose this route as a long-term option while others do consulting intermittently between other jobs. Some work independently as freelancers; others set up their own businesses; and some join already established companies.

Most of the leaders interviewed for this study said they had done some consulting for the organization they had left, which helped them transition to encore careers. One person referred to this period as “semi-retirement.”

These former nonprofit leaders, as well as the program manager described above, are consultants:

Then – Museum manager

The journey – Leaving a high-stress position that required her to work 60 to 70 hours a week, she tried to move into a full-time art career. She eventually decided to go back into museum management.

Now – It is proving difficult to find the right position, with limited opportunities in her region. She is working as a nonprofit consultant as she seeks another job in her previous field.

Then – Program officer for a major international foundation

The journey – Not yet 50, she does not consider herself retired in a traditional sense. But she wants to position herself for an encore career, because she needs flexibility to care for aging parents. Opportunities for consulting have come easily because of her networks and reputation. She is looking for something that will be more stable – but flexible – for which she can use her academic, philanthropic and strategic thinking skills.

Now – She is a consultant and freelance researcher and writer handling scholarly projects.

OTHER ENCORE POSSIBILITIES

In addition to the encore careers described by those interviewed, research for this paper surfaced examples of other encore roles available to nonprofit leaders, including:

Taking on a new role with the former organization

Nonprofit executives are typically committed to their organizations. There are often ways a departing executive director can continue to be involved outside the executive role. There are many examples of former executive directors who became program directors, fundraisers or board members of their organizations.

Working for another nonprofit in another staff role

Some nonprofit leaders have chosen not to replicate their management or executive responsibilities, instead taking on direct-service and other staff roles. For example, after successfully climbing the career ladder, a health care administrator moved to working directly with homeless people in shelters and on the streets.

Teaching or coaching

Nonprofit executives often find teaching or coaching to be satisfying, although the financial rewards may be limited. Many universities offer degree programs and continuing education classes in nonprofit fields, providing opportunities for nonprofit executives to share their knowledge.

Many executives find coaching to be an easy and natural move. Years of on-the-job experience and content expertise make departing nonprofit executives ideal candidates for coaching nonprofit staff.

Assuming a community leadership role

Nonprofit leaders have considerable assets they can take into public office, including strong networks; deep knowledge of the community and fundraising; and public speaking and leadership skills. For example, a founding director of a Washington, D.C., nonprofit was influential locally in a variety of civic matters. When he left the nonprofit after 10 years he won a city council seat and later became council chair.

PREPARING FOR AN ENCORE TRANSITION

This new stage of work requires strategic planning. However, such services are not generally available to those contemplating or preparing for an encore phase of life. Although all those interviewed described thoughtful preparation for their retirements, few had access to formal career or life transition services. Although they devoted considerable time to preparing their organizations before they left, such planning focused entirely on the organizations' stability rather than the exiting leaders' next chapters.

Most of the interviewees recognized that they likely would have benefitted from formal encore career planning but couldn't find anything in their regions. Some attended AARP webinars but found that those mostly focused on financial planning for retirement rather than life mission planning. One leader had some executive and life coaching provided through her employer but felt that it "missed the mark."

Another person did have a successful coaching experience, however. She began a relationship with a personal coach when she returned to work after a life-threatening illness. Through the coaching process she decided on a retirement plan, which she set into motion after about six months.

For most, the transitions were do-it-yourself projects. The former leaders read books; did self-help exercises and assessments; and kept up with their professional fields through courses and programs. Friends and spouses helped the leaders think through their transitions. Professional networks and colleagues opened new opportunities.

Several elements, outlined below, helped the leaders in their encore transitions.

Volunteering

For some, volunteering has led to encore opportunities. The children's agency executive shared:

“When I retired, I moved to another part of the country and started fresh by volunteering for Habitat for Humanity, because of my daughter's enthusiasm for the organization. It also matched a real sense of mission for me. I didn't even have time to get proactive about seeking an encore career when the Habitat chapter where I was volunteering offered me the executive job.”

Volunteer roles have allowed some to try new ideas and learn new skills. For example:

“I've always been an active volunteer in addition to working. As soon as I left my job I started to do pro bono work for a new local museum. Also I am a literacy tutor and work with adults who can't read. And I am a practicing Buddhist and volunteer at the temple. Volunteering has been important as part of the transition because it helps to restore the social context that you lose when you leave the job.”

“Although many friends advised me to take a down period to start my retirement, I plunged into doing what I wanted. Among other things this includes two days a week when I leave my house at 5:30 a.m. to go to the U.S. Botanic Garden to work outdoors doing basic gardening in the azalea and rhododendron collection, or I go to the production facility to start new plants. They are glad to have me for what I want to do – digging and planting – and I don't even really want them to know about my other skills for fear that they will want me to do things that are more like my jobs.”

“Although I live in a small community, I feel well connected regionally and nationally through my encore career but also through my volunteer work. I serve as the board chair for a national organization dedicated to

community development; I'm also on a regional philanthropy board as well as a local board in my town. And I volunteer through my church.”

Embracing change

Those who had moved swiftly (and mostly easily) from midlife careers to encore opportunities said they *loved* change. In contrast, those who expressed having problems making satisfying transitions identified themselves as people who *adapt* to change, though they don't seek it.

Although the interview group is too small to make sweeping generalizations, it is interesting to note that those who loved change bounced more easily into their next life stage, mostly making rapid decisions and being happy to learn and adjust along the way.

Exuding self-confidence, self-knowledge, emotional intelligence

One of the great advantages of a lifetime of successful work is self-confidence and self-knowledge. All of those interviewed talked about deeply believing in themselves. Most were also frank about their limitations and their willingness to accept such shortcomings. One leader appreciated having “the ability to enjoy the transition without stressing out,” and “knowing I can contribute to my community and the world, knowing my skills are useful but the work does not have to be all-consuming to be meaningful.”

Emotional intelligence is the ability, capacity and skills to manage one's own emotions and those of others in healthy and productive ways. It is an idea that has helped researchers understand why intellectual intelligence isn't always enough to help people navigate successfully through organizations, make good decisions and handle leadership responsibilities. Emotional intelligence is an essential skill in leadership and in making successful individual decisions, particularly in the context of others' interests and needs.

All of the people interviewed disclosed examples of their relationships with coworkers, bosses, boards, friends and families that indicated high-level emotional intelligence. Even those who experienced barriers in landing their ideal encore careers were self-analytical and focused on problem solving.

One person observed, “I am so in tune now with what is stressful to me, and I'm willing to just take myself out of things when my body and mind tell me it is highly stressful. I don't have the same needs to satisfy obligations no matter what.”

Although emotional intelligence testing has remained mostly in the domain of expensive corporate leadership development programs, assessing emotional intelligence also could benefit nonprofit leaders, especially as they move toward

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more responsibility and as they approach retirement. Being aware of emotional intelligence could likely help people in transition make smarter decisions while helping others.

THE UNEXPECTED

Most of the nonprofit leaders were surprised – some pleasantly and others negatively – by something unexpected during their transitions. In their own words:

Pleasant surprises

- “My energy has been so high. I thought I would be lucky to ride my bike around the neighborhood, but I find I have such a high energy level. I’m so happy to be in an encore career that is interesting, challenging and new and yet meets my values.”
- Relinquishing the top role helped one interviewee to be a more generous leader: “I don’t need to take credit for anything. ... It’s great to see other key people on the staff being out there and being visible. I don’t have to be the one.”
- One person who left a job with enormous management responsibilities noted that she was surprised to discover that satisfaction with work doesn’t depend on the organization’s size. “What matters and makes the difference is the mission and the fit of the mission to the person.”
- “I’m surprised by how much I enjoy *not* working in the same way. It took a while to get away from the routine of working so intensely and being needed all the time. ... For months I woke up every morning feeling like I had to do something constructive. But then I took the first encore job and it soon became high pressure. I quickly realized that was not what I wanted. So the second time I retired I was able to go deeper into finding other enjoyable things to do that are productive in very different ways than the productivity we associate with our jobs. Now my second encore job is a better balance.”
- “I realize that I’m not interested in defending the status quo. I feel that I can take more risks. I will only take on encore opportunities in which I can be less constrained and restrained. I want to make change. President Obama has inspired me to want to serve my country and to pay back for the advantages I’ve had. I thought retirement would make me mellow, but instead I’m more determined than ever to make change.”
- “I did not expect this stage of life to be so full and completely absorbing. I didn’t expect to be so busy.”

Unsettling twists

- “How hard it has been! Two and a half years ago I had a title, lots of responsibilities, lots of recruiters calling me, lots of connections and perks in the community. I’m still the same person, but I feel that people look at me completely differently because I took early retirement (early 50s).”
- “I am taken aback by some of my own reactions. You can’t wait until you are in a position where nobody is telling you where to be and when. But then you realize how much you have structured your life around your job. There have been a number of odd moments where I had to learn to say “no” without the excuse of my job. Now I have to find it in me to decide and to prioritize. Now I understand why my friends have said that they are busier in retirement than ever before. It has taken me a good year to really feel entitled to a different life.”
- “The costs of living in retirement have been surprising. Maintaining insurance is more costly than expected, and other expenses are more – not less – than I had assumed about retirement. This means that I can’t help others as much as I planned. My sense of independence is decreasing.”

A few people were surprised by how difficult it has been to find the right encore opportunities. They assumed that their experience would be in demand and that they would know intuitively how to find the right encore work. Those who are limited by geography – rural areas or small cities where there are fewer and smaller institutions and limited flexible opportunities – have felt rejected for being overqualified. They sense that organization leaders can’t believe that highly qualified professionals might want less responsibility and prestige.

The person who expressed the most concern about the journey was the former health administrator looking to create a new project or organization to meet the needs of seniors in her community. She has looked for partner agencies who might welcome a new project. She said agency leaders appear to be overwhelmed and stretched thin by economic pressures, unable to spare time to think about innovation. At the same time, her startup skills are untested, and she is unsure about “how to connect with the right people.”

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Another person said, “I’m willing to move, and I’ve applied for many jobs. But I don’t even get an acknowledgement or don’t get a call back if I call to inquire. This is so different from how I’m used to treating others.” Another observed, “Some opportunities come to me without any effort. Yet other things that I think I want and am pursuing are challenging and elusive.”

A few of the former nonprofit leaders said they faced various limitations, including money, geography, scarcity of jobs, family responsibilities or even self-doubt about the transition.

ADVICE

The leaders interviewed in this study were asked about how they would advise others contemplating an encore transition, either now or well into the future. Most everyone had the same advice. In their words:

Know yourself

- “Dig deep, and do the hard work of knowing who you really are and what brings you joy and then organize your retirement and encore career around those things. A deep connection to the meaning of the encore work is the most important thing if you want to feel satisfied ... not just busy.”
- “I was so surprised after I left my job to realize that I was my job, even though I had never felt that it was so dominant in my life. I had to really think about why I was doing the work ... because it was there or because I truly loved it? Women in our culture are conditioned to serve others, and we are not encouraged to think about what we really want. I put myself through some rigorous self-examination. I tried the self-exam quizzes in [self-improvement guru] Barbara Sher’s books. They were really hard for me. I couldn’t wrap my head around the concept that I could admit what I liked. I found out that I was really out of touch with some very core things about who I am.”

Start planning early

- “If you are still young, be very aware of what you like to do, whether it is your career now or not. Start rearranging your life and goals to match up to what you really love.”
- “Early in your career, take advantage of every opportunity to learn and experience new things. Don’t assume that what you know in your early working life is the same as what you will need to know in the future. Younger workers are likely to have multiple careers before they retire to an encore career. Don’t underestimate formal and informal learning.”
- Be clear about what you want to *be* in your second life ... not just what you want to *do*. Don’t just take the path of least resistance. Prepare better than I did, and be sure to think about the implications of your decision for other family members and logistics at home.”

- “Make a strategic plan for your own retirement transition. That means researching, self-assessment, laying the groundwork for changes, prioritizing, having a transitional financial plan, setting priorities.”

Assess your finances

The former nonprofit leaders said people should work for love not money, though they should be smart about money. In other words, take time to plan and save. One person advised:

“If you still have time, dig deep into your values and history, and discover what financial security means to you. And get serious about working toward it. Very few people – especially those in social sector jobs – will ever have large or secure pensions. It is up to you to figure out how to save so that you have flexibility and options later in life.”

Build and sustain networks

The leaders suggested that people seeking encore careers should stay involved with the people and causes that matter to them. Most of those interviewed strongly advised that making time for serving others is centrally important to feeling happy and optimistic. They also advised staying involved in professional networks. As one interviewee said, “The more people you know, the more likely you will be able to build a good support structure for life changes.”

Imagine

- “When searching for an encore career, don’t rule out anything. Keep yourself open to opportunities, and don’t define yourself too narrowly. Keep learning so that your comfort zone grows rather than shrinks.”
- “The world is becoming a much smaller place, and you will likely need to know about and interact with other cultures. You will have opportunities to travel to or live in other places. Take advantage of this.”
- “Make sure that life always includes space for creativity. Don’t get burned out on the demands of the moment.”
- “Trust the counterintuitive. Tolerate not knowing while you are figuring it out.”

Don't expect certainty or a straight path

Many of those in this study had multiple encore experiences and developed their ideas along the way. Anticipating that retirement and encore careers will evolve and raise numerous challenges is important, they said. Those who assume that there is a single, tranquil path in retirement are in danger of feeling confused, isolated and depressed, believing that they have personally failed to manage their own experiences. Finding ways to enjoy the journey and accept evolving opportunities are important to encore happiness, the leaders cautioned.

CONCLUSION AND RECOMMENDATIONS

Boomers leaving their long-term nonprofit leadership positions and landing in encore careers are doing so mostly in an ad hoc way. The experiences of those in this study are reassuring, because each person is satisfied with the transitions he or she has made. And all of them have found personally meaningful ways to continue making the world a better place. But it shouldn't be so hard, or haphazard, to transition from one stage of work to the next.

These leaders offer guidance for nonprofit workers considering a transition to an encore career – both through their experiences and their explicit advice. Their stories underscore the need for a more systemic approach to helping others consider and move into a new stage of social impact work and to helping nonprofits understand how they – and the sector as a whole – can benefit from this talent.

Such a systemic approach for nonprofits would include:

- Developing life planning programs and materials to guide nonprofit workers leaving their organizations to other productive, social-purpose roles and incorporating those resources as part of succession planning
- Creating financial assistance and incentives to help in the transition; offering resources to inform nonprofit leaders seeking encore careers about available opportunities; and facilitating job placement
- Helping early career employees develop financial security to enable them to remain in social impact work
- Encouraging a new way of thinking about life span and how continuing to work for a good cause – rather than retiring outright – can be personally fulfilling

As Jan Masaoka has suggested, grantmakers concerned about innovation and capacity in the nonprofit sector have a stake in implementing ways to enable successful transitions of nonprofit leaders to encore careers. The same is true of communities that want to strengthen nonprofits that serve vital needs and to harness the talent of the growing population of retiring boomers.

Ultimately this initial look at a small sample of nonprofit leaders shows how such professionals can be renewable resources for their communities and the social sector overall. Their experience and knowledge is valuable, and most have substantial time to take on new roles and responsibilities. Organizations and communities that learn to nurture and support the encore careers of their nonprofit leaders stand to gain immeasurably. Even more important, they will help their experienced people remain in the work force while continuing to serve the public good.

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RESOURCES

Books

Portfolio Life: The New Path to Work, Purpose, and Passion After 50, by David Corbett and Richard Higgins

Reworking Retirement: A Practical Guide for Seniors Returning to Work, by Allyn I. Freeman and Robert E. Gorman

Encore: Finding Work That Matters in the Second Half of Life, by Marc Freedman

Changing Course: Navigating Life after 50, by William A. Sadler and James H. Krefft

Supercharged Retirement: Ditch the Rocking Chair, Trash the Remote, and Do What You Love, by Mary Lloyd

Don't Retire, REWIRE! 5 Steps to Fulfilling Work That Fuels Your Passion, Suits Your Personality, and Fills Your Pocket, by Jeri Sedlar and Rick Miners

New Passages: Mapping Your Life Across Time, by Gail Sheehy

Websites

AARP – Explores work trends for people 50 and older
aarp.org/money/work

Cool Works – A guide to finding adventurous or seasonal work, including conservation jobs
coolworks.com

Encore.org – A resource for people seeking encore careers
encore.org

RetiredBrains – A resource that highlights post-retirement careers
retiredbrains.com

Revolutionize Retirement – Lists workshops and retreats that explore life after retirement
revolutionizeretirement.com

VolunteerMatch – A service that links people with volunteer opportunities
volunteermatch.org

NOTES

¹ MetLife Foundation/Civic Ventures Encore Career Survey (2008).

² *The Departing: Exiting Nonprofit Leaders as Resources for Social Change*, by Jan Masaoka, September 2007; Grantmakers for Effective Organizations.

³ “A Table for Two: Founders and Successors in the Same Shop?” by Mark Leach, *The Nonprofit Quarterly*, Fall 2009.

⁴ The interviewees included three men and six women from different parts of the country whose primary careers had been in executive or senior management nonprofit roles. Eight are white and one is African-American. Most are in their 60s. One is in her 50s, and one is not yet 50. Seven were selected from respondents to an online (Civic Ventures website), open-source survey intended to identify nonprofit leaders in or looking for encore careers. One person was identified when his organization won an Encore Opportunity Award, sponsored by MetLife Foundation and Civic Ventures. One person was identified through personal networks.

⁵ MetLife Foundation/Civic Ventures Encore Career Survey (2008).

⁶ *Interim Executive Directors: The Power in the Middle*, by Tim Wolfred, 2005; The Evelyn and Walter Haas, Jr. Fund.

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To conceptualize this project we relied on the years of spoken and written wit and insight of Civic Ventures' founder, Marc Freedman, and all those at Civic Ventures who are working to create new concepts of mature life. We also drew from Frances Kunreuther's thoughtful observations and ideas as well as those who participated in the Crossing Generations meeting. They saw the need for research on the next chapter of work for nonprofit leaders.

ABOUT THE AUTHOR

Stephanie Clohesy owns a strategic planning and organizational development consulting firm that specializes in bold decision-making for just and sustainable social change. Her clients include major philanthropic and nonprofit organizations. Her work concentrates mostly on national and international issues but also includes local and regional projects. Outside the United States, she has worked in war and post-conflict zones in Eastern Europe, Latin America and Africa. Clohesy focuses on organizational change and innovation, using such tools as assessment/research, planning and strategic program design. She has written numerous reports on topics as varied as new trends in philanthropy; the transition of the social sector to online space; mixing nonprofit and commercial structures for social good; and the increasing use of donor or giving circles. Clohesy served as an Executive Director of Legal Momentum and as a Program Director for the W.K. Kellogg Foundation.