

# A New Story About Later Life

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*The Atlantic Philanthropies' Effort to Expand Civic Engagement  
Among Older Americans, 2001–2010*

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FEBRUARY 2012

## Acknowledgements

Information in this report is drawn from five primary sources. The first is the internal records of The Atlantic Philanthropies, including its database of grants and its archive of strategy papers, internal memos, grantee reports, and Board minutes. In Civic Engagement of Older Adults, the principal curator and interpreter of this body of information has been Programme Associate Jackie Deslauriers, an indispensable resource for understanding the initiative's history and development.

The second source was the personal recollections of Atlantic staff and several key grantees. The two former program staff members most closely associated with this work, Laura Robbins and Brian Hofland, were not only generous with their time and analysis, but were exceptionally willing to critique their own efforts and to suggest outside experts as sources of independent judgment. The acting director of Atlantic's Ageing Programme, Stephen McConnell, and Programme Executive Stacey Easterling likewise provided valuable reflections on the initiative and assessments of its lessons. Grantees, quoted throughout the report, offered both their personal experiences and their perspectives as frontline participants in a new and evolving field.

Third, this paper is deeply indebted to three evaluation reports by Professor Jim Hinterlong of Virginia Commonwealth University. Dr. Hinterlong's research is cited several times in the pages that follow, but even beyond these particular citations, his expert observations of the field and Atlantic's work informed and influenced the entire report.

Fourth, most of the historic and scholarly references draw from a painstaking literature review by Patrick Sabol of Duke University's Sanford School of Public Policy. Two publications in particular furnished a wealth of information and context for thinking about the future of aging in the United States: Sara Lawrence-Lightfoot's *The Third Chapter: Passion, Risk, and Adventure in the 25 Years After 50* (Sarah Chrichton Books, 2009) and Marc Freedman's *The Big Shift: Navigating the New Stage Beyond Mid-Life* (Public Affairs, 2011).

Finally, the entire process of researching, interviewing and writing was patiently guided and encouraged by John A. Healy, Atlantic's Director of Impact Assessment and Global Learning.

## Executive Summary

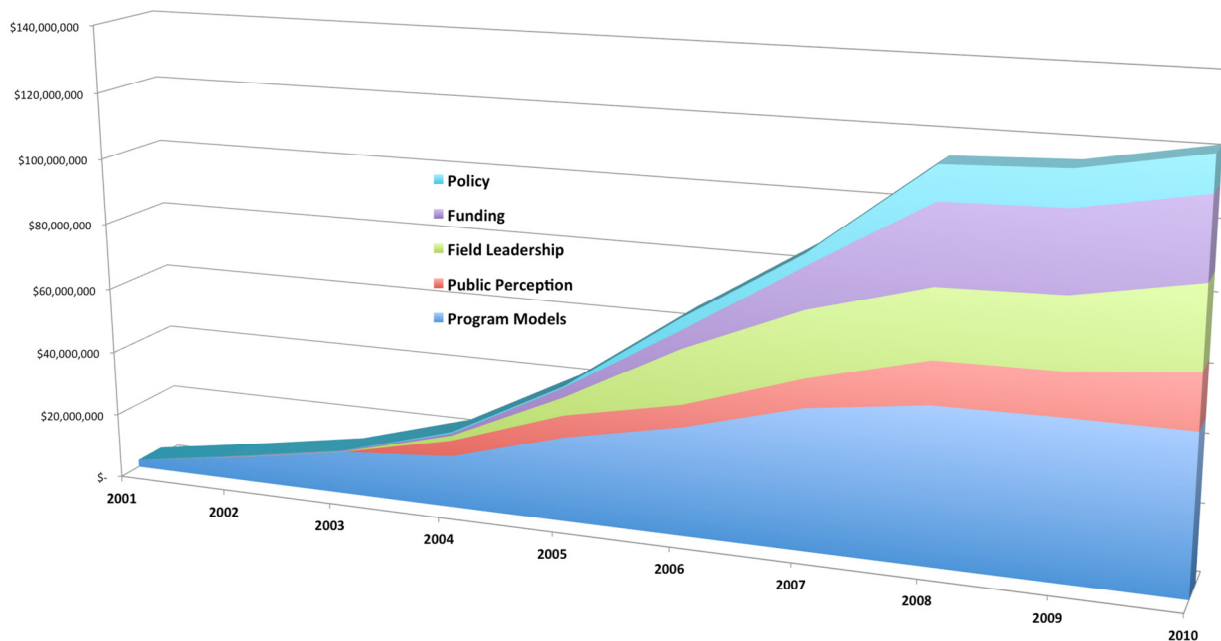
Between 2001 and 2010, The Atlantic Philanthropies distributed \$120 million in grants to promote greater opportunity for work, learning, and volunteering among older people in the United States. Known formally as Civic Engagement of Older Adults, this line of work was premised on the idea — increasingly supported by research — that people are likely to enjoy a healthier and more satisfying life after age 60 if they are involved in purposeful activity in connection with other people.

Older adults are also a prime source of talent, experience, and energy for solving social problems, and evidence suggests that they are eager to put these assets to work, given the chance. Yet opportunities for meaningful education, employment, and community service tend to grow scarcer in later life, largely because most of society still mistakenly believes that older people are uninterested in, and even ill-equipped for, regular work or study. Altering that perception and widening the avenues of productive activity beyond age 60 would thus have a double benefit: It would remove obstacles to a more satisfying and healthier life in the later years, while also mining an untapped supply of talent and energy for meeting societal needs. Those twin goals formed the cornerstone of Atlantic's Ageing Programme for nearly a decade.

The Civic Engagement initiative began with a strategy paper adopted in 2001 and was gradually refined and elaborated on over the next three years. By 2004, a more detailed strategy and new Logic Model began to focus the Foundation's investments on five areas of activity:

- Developing replicable, sustainable **program models** that expanded opportunities for volunteerism, employment, and lifelong learning for older adults;
- Promoting a more accurate and supportive **public perception** of older people and their role in society;
- Galvanizing a Civic Engagement **field with outstanding leadership**, stronger organizations, and better, more routine connections among various parts of the field;
- Mobilizing more **funding** for this area of work, both from philanthropy and, in the longer run, from government agencies and programs;
- Formulating and advocating for improvements in **public policy** that will expand opportunities for older Americans to work, learn, and volunteer.

### CUMULATIVE GRANTS FOR CIVIC ENGAGEMENT OF OLDER ADULTS, 2001-2010



By far the largest of these lines of work was the first: developing new **program models**, assessing their usefulness, and encouraging wider experimentation with these new ideas in a variety of communities around the country. Although the internal strategy papers placed equal emphasis on programs to promote work, education, and volunteerism, it was the last of these three that drew the greatest interest from organizations that serve older people. Given the chronic shortage of resources in the voluntary sector, the prospect of drawing significant new talent and energy from the ranks of older Americans — whose numbers were about to swell as the Baby Boom generation retired — struck many of Atlantic’s grantees and advisers as a historic opportunity. In the end, roughly two-thirds of the money awarded for developing and testing new programs was aimed specifically at expanding volunteerism and community service.

In that category of activity were some of Atlantic’s most prominent grantees in aging, beginning with the California-based organization Civic Ventures, one of the earliest and most vocal advocates for civic engagement among older adults. Beginning in the mid-1990s, Civic Ventures had incubated a new program called Experience Corps, which taps older Americans as tutors and mentors for children in grades 1-3 who are reading below their grade level. Civic Ventures has also been the prime exponent of the idea of “Encore Careers,” which encourages people to try a new, more satisfying line of work after retirement, such as in some form of community service. The organization also presents a nationally recognized award, the Purpose Prize, that annually honors outstanding people who have made a major contribution to solving civic problems during their Encore Careers. Atlantic supported all these lines of work, in a relationship with Civic Ventures that ultimately totaled more than \$34 million.

Other major grantees in this category included the National Council on Aging, which received close to \$7 million from Atlantic to cultivate, classify, and promote effective models of engaging older people in community service. In one part of that effort, NCOA's *RespectAbility* initiative developed a sophisticated mechanism for measuring the cost and benefits of older volunteers' activities. The council applied the measurement system to 22 exemplary programs, demonstrating not only that they successfully enlisted older people in important work, but that the benefits of doing so far outweighed the cost of recruiting, training, and deploying the workers and volunteers.

To help expand opportunities for paid employment outside the nonprofit sector, the Foundation contributed \$2.1 million to the Conference Board to sponsor and disseminate practical business information on ways of valuing and managing a mature workforce. And the Partnership for Public Service received \$3.2 million over five years to help federal agencies boost their recruitment and hiring of older civil servants.

Efforts to alter **public perception** of older people and their role in society included more than \$6 million in support to Twin Cities Public Television, first for a TV series called *Life (Part 2)*, which aired nationally on PBS for two seasons, and later for the creation of an online information and social-networking service called Next Avenue Workshop. Both projects were attempts to experiment with new kinds of programming for older people that would not only present a more positive, realistic picture of the post-retirement years, but give older audiences additional tools to help "navigate the later stages of life," in the words of a public television executive.

Atlantic's efforts to strengthen **leadership in the field** of civic engagement included two national gatherings of grantees, in 2006 and 2008. Several participants say that they began to envision their work as part of a larger, more diverse movement as a result of attending these meetings. At the same time, Atlantic was also funding professional and trade associations where influential practitioners and experts could share ideas, research, and program models on civic engagement of older adults. These included the Gerontological Society of America, the American Society on Aging, and the American Association of Community Colleges. The last of these, with a grant of \$3.2 million, launched the Plus-50 Initiative, which helps community colleges develop and expand programs specifically for older learners. Finally, Atlantic capped its field-building effort by encouraging the formation of a field-wide coalition of leading organizations, called Age4Action, where members could exchange information and coordinate advocacy on major issues. The Foundation provided start-up funding to launch Age4Action and sustain it through its first, formative years. But in the wake of the 2008 financial crisis, the members have not been able to raise enough money to support its staff and overhead. The network nonetheless continues as a voluntary association, with the hope of future funding in better economic times.

One of Atlantic's first observations in launching its Civic Engagement initiative was that "no large national foundation has focused its resources on aging as an opportunity and older adults as resources." So, to encourage more philanthropic **funding** in this area, Atlantic supported two large incentive programs — one aimed at increasing support from community foundations, the other at national foundations and regional associations of grantmakers. With grants totaling more than \$17 million between 2006 and 2013, Atlantic created the Community Experience Partnership, a matching-grant program that encourages community foundations to design, launch, support, and test new initiatives to engage older adults in locally significant activity. At the same time, the Foundation sought to have a similar effect on its counterparts in national and regional institutions with more than \$3.6 million in grants to the philanthropic affinity group known as Grantmakers in Aging.

The smallest area of work in the Civic Engagement initiative was in **public policy**, largely because that line of grants was the last to take shape and thus had the shortest running time. The Foundation paid for training and technical assistance in policy development and advocacy for several of its grantees. It also made a \$3.6 million grant to the Council for Adults and Experiential Learning for efforts with the U.S. Department of Labor to ensure that a key federal workforce training program is fully available to older Americans. Part of Atlantic's support for Age4Action helped that network win significant improvements to the Older Americans Act when it was reauthorized in 2011, and promote provisions in the new Serve America Act of 2009 that are specifically aimed at community service among older adults.

Despite what many staff members and grantees regarded as gathering momentum behind these various lines of work, Atlantic chose to end the Civic Engagement initiative in 2009 and 2010, several years sooner than the original plans had envisioned. The effort was terminated not because of any dissatisfaction with its accomplishments — several of which were documented in interim evaluation reports in 2007, 2008, and 2011 — but because the Board and management were beginning to narrow and realign the Foundation's mix of programs as Atlantic prepared to end its grantmaking in 2016. Nonetheless, the decision to end the initiative was made with only cursory attention to how (or whether) the grantees and programs might be able to stay afloat — or, if they could not, how they might be wound down in an orderly way. When grantees were informed that their support was at an end, most were given no more than 12 months to replace the Atlantic money or close down the supported activity. As this is written, a few major efforts have raised replacement funding, others remain hopeful but unsure, and a few have closed or severely curtailed their Atlantic-supported work. Most believe that the accomplishments thus far will be sufficient to sustain the field — or at least the core ideas behind it — until a stronger economy raises the chances of renewed funding.

At least six broad lessons emerge from a review of Atlantic's experience in the Civic Engagement initiative. The first is that **a broad, malleable definition of the problem and goals** proved to be both a strength and a weakness. The initiative was

built around several different targets and objectives, some of which rose and fell in importance over time. Different grantees viewed different aspects of the initiative as primary, and even the Atlantic Board showed some division of opinion over what the main goals should be. These ambiguities were not unintentional, and they provided valuable latitude for new ideas and models to emerge, especially in the early years. Over time, however, the lack of a solid consensus about core purposes, in the words of a 2011 evaluation, made it “almost impossible to adequately capture the breadth, scale, and impact of innovation underway nationally.”

Second, the stream of grants for Civic Engagement plainly built **credibility for the field**, and despite the initiative’s truncated lifespan, it achieved most or all of the goals initially envisioned for it. An evaluator was able to list more than a dozen milestones that the field had reached in just the first five years of Atlantic’s work — although he was careful not to attribute the achievements solely to the Foundation. Third, the initiative plainly helped spotlight a number of **fundamental ideas that are now solidly part of the national discussion** on aging. While the actual effect of these ideas on national policy and private practice is still uncertain, independent observers believe that the terms of debate have shifted. As an evaluator summed it up, “there is growing acknowledgement that engaging older adults in civic activity is a winning proposition.” He adds that leaders in philanthropy, government, and academia increasingly use the language of civic engagement to describe the opportunities confronting the Baby Boom generation as it retires.

A fourth point, however, is that for all the field’s growth and accomplishment, a **shortage of prominent national leaders** makes it questionable whether the momentum can be sustained, much less expanded. A key purpose of the Age4Action network was to establish a leadership nucleus capable of drawing other influential voices and actors into the field. With little or no funding in the near future, it is unclear whether the network can fulfill that role as a purely voluntary organization.

A fifth and related point is that the abruptness of Atlantic’s departure provided **little opportunity for an orderly transition** and for regrouping and re-imagining the future of the field. Programs develop forward momentum as they operate. Bringing them to a stop demands a period of adjustment — time to slow the momentum and to redirect their energies toward a realistic destination. The 12-month conclusion of Atlantic’s work in this area, and the lack of a planning and communication effort before the conclusion, effectively deprived the field of the necessary time to change course smoothly and effectively. That is all the more worrisome in light of the aftershocks of the financial crisis and sluggish economic recovery. These have raised fundamentally **new questions about later life in post-2008 America** — about how and when Americans will be able to retire, how their income and health care will be provided for, and what unexpected demands may await them. The point is not that a weaker economy will necessarily undermine the principles of civic engagement. But it may well shift the emphasis, demand a different mix of opportunities, and call for continued innovation, experimentation, and leadership to meet the needs of an enormous generation that is just now beginning to retire.

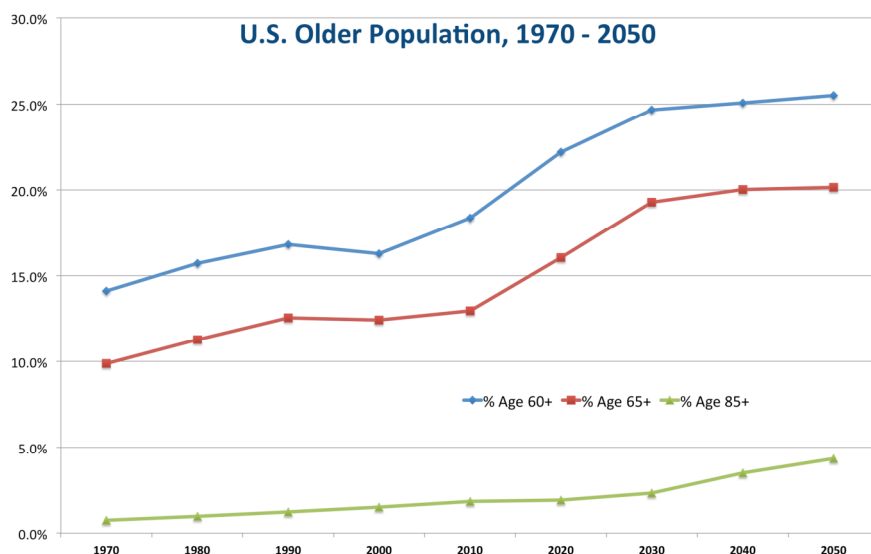


# A New Story About Later Life

## *The Atlantic Philanthropies' Effort to Expand Civic Engagement Among Older Americans, 2001-2010*

MIDWAY through the 1980s, sociologists, gerontologists, and demographers began to note the emergence of a new stage in life: a “Third Age,” between retirement and frailty.<sup>1</sup> They posited that the years between 60 and 80-something were becoming a period of opportunity and “active leisure,” when a longtime career and its demands had ended, but mind and body remained vigorous. At that point, the idea of this emerging stage in life was still tentative and its implications uncertain. But it was about to gain currency, and even urgency, over the next quarter century.

One reason for the urgency was the approaching retirement of the demographic bulge known as the Baby Boom, the postwar generation born between 1946 and the



mid-1960s. By 2006, a Baby Boomer would be turning 60 every seven seconds.<sup>2</sup> Not only was this cohort historically large, but it was healthier, better educated, and materially better off than any in recent history. Among the results of these advantages would be increased life expectancy, vitality, and a more widespread

<sup>1</sup> Some of this history is described in Paul Higgs, “Citizenship Theory and Old Age: From Social Rights to Surveillance,” in Anne Jamieson, Sarah Harper, and Christina Victor, *Critical Approaches to Ageing and Later Life*, London: Taylor & Francis Group, July 1997, pp. 121-123.

<sup>2</sup> Nancy Henkin and Jenny Zapf, “How Communities Can Promote Civic Engagement of People Age 50-Plus,” *Generations*, Winter 2006-2007, p. 72.



appetite for challenges in later life — in short, the arrival of the Third Age on a gigantic national stage.

In one respect, however, the early Third Age theorists proved to be slightly off the mark. In the 1980s and '90s, as researchers looked more closely at the changing landscape of retirement, a growing body of research was confirming that, rather than “active leisure,” older Americans more often sought new, productive uses for their time and skills, either in new careers or in some form of education or community service. In a groundbreaking 1989 book, historian Peter Laslett envisioned the Third Age as an “age of fulfillment,” in which the principal desire is for continued accomplishment, not just better recreation.<sup>3</sup> Twenty years later, sociologist and Atlantic Philanthropies Board member Sara Lawrence-Lightfoot, in her 2009 book *The Third Chapter*, put narrative flesh on this principle by gathering the stories of 40 adults between 50 and 75 and detailing their desire to live out a purposeful, principled adulthood in these terms:

They look to their origins, to the lessons they learned at home — about service, charity, justice; about collective responsibility and citizenship — and feel — often for the first time — compelled to find a way to enact those values and principles. They feel at a point in their lives when they can take the time to look back and ‘journey home.’ By this stage, they are likely to have accumulated a rich array of experiences, resources, and skills that they are yearning to use wisely and well. Over the years, they have developed patience, learned restraint, grown in wisdom. They have honed their expertise, identified their gifts, and learned how they learn. They have built professional networks that allow them access to resources and institutions. What seems to surge up in them — like a compelling narrative — is the desire to ‘give forward,’ to be useful, to make an imprint. They want their lives to have meant something.<sup>4</sup>

Unfortunately, not long after scholars began to grasp the possibilities of the Third Age, or Third Chapter, they also began to recognize an obstacle to fulfilling it: The Boomers’ increased desire for fulfillment and productivity was unlikely to be matched by proportional opportunities for meaningful work, learning, or service. On the contrary, even as older people increasingly saw themselves as entering into a uniquely powerful stage of adulthood, much of the rest of society seemed stuck in traditional ideas of later life, defined primarily by the limitations, hardships, and dependency of extreme old age. Public policy on aging still focused overwhelmingly on care, support, and assistance, with almost no attention to the growing reality that most older Americans needed little more of those things than do their younger counterparts. Employers continued to view older employees as venerable but troublesome, physically limited and technologically backward. As it happens, just a

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<sup>3</sup> Peter Laslett, *A Fresh Map of Life: The Emergence of the Third Age*, Cambridge: Harvard University Press, 1991.

<sup>4</sup> Sara Lawrence-Lightfoot, *The Third Chapter: Passion, Risk, and Adventure in the 25 Years after 50*, New York: Sarah Crichton Books, Farrar Straus, and Giroux, 2009, pp. 105-106.

few years before the coining of the phrase “Third Age,” the lexicon of sociology had acquired still another new term: ageism.

In 1977, the *Harvard Business Review* published the results of an experiment in which subjects were asked to take on the role of a corporate executive and make management decisions in response to a hypothetical series of problems.<sup>5</sup> Half the participants were assigned situations involving older workers; the other half got the same situations, but with younger employees in the key roles instead. Not only were the responses of the two groups different, but those who were dealing with older employees reported feeling that the older workers were “more resistant to change, less motivated to keep up with new technology, less creative, and less capable of handling stressful situations.” The role-playing managers were much less likely to consider career development and training for their older employees than were those who dealt with younger ones. And they were less likely to consider older high-performers for promotion.<sup>6</sup>

Nor were things appreciably better in the educational or community-service realms. True, there were many volunteer opportunities and continuing-education courses tailored for retirees, but these usually tended to be low-level and routine — often far short of the opportunity “to make an imprint” that older adults were craving. Marc Freedman, founder of the nonprofit group Civic Ventures and a prominent advocate of Third Age opportunity, devoted part of an influential 2002 article to the deficiencies of American civil society as a resource for adventurous, ambitious older adults:

While significant numbers may well be receptive to engagement in volunteering, national service, and other forms of public-interest work in the new chapter replacing retirement, there is a difference between receptivity and reality. Bringing about a transformation in the actual role of older Americans will require significant cultural change and institutional change. We will need both to tell a new story about what is possible and desirable in later life and to create far more compelling opportunities for translating interest into action. ... To start, the challenge will be to convince [older Americans] that public service can be more than the kind of busywork long associated with ‘senior volunteering.’ ... Overall, the landscape of opportunities continues to be spotty, and we risk squandering the idealism of those who want to serve.<sup>7</sup>

In a related article a few years later, Mr. Freedman told the story of a retired professor of medicine who “approached the local hospital with an offer seemingly too good to refuse: ‘Put me to work in a way that makes use of my experience and my passion for medicine, and you can have my services free of charge.’ ” The

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<sup>5</sup> Benson Rosen and Thomas H. Jerdee, “Too Old or Not Too Old,” *Harvard Business Review*, November 1977, pp. 97-106.

<sup>6</sup> Helen Dennis and Kathryn Thomas, “Ageism in the Workplace,” *Generations*, Spring 2007, vol. 31, no. 1, pp. 86-87.

<sup>7</sup> Marc Freedman, “Civic Windfall? Realizing the Promise in an Aging America,” *Generations*, Summer 2002, vol. 26, no. 2, pp. 88-89.

hospital assigned her to fill water pitchers.<sup>8</sup> This was plainly not the “story of what is possible in later life” that most retirees hoped to hear.

Significantly, Civic Ventures would soon become the largest single recipient of grants from The Atlantic Philanthropies in the area of civic engagement of older Americans — largely because of Civic Ventures’ path-breaking effort to create a more purposeful, challenging, and valuable role for older people in civil society. Since the mid-1990s Mr. Freedman had been developing a new model of community-service program that came to be known as Experience Corps, in which older adults serve as tutors for children in grades 1 to 3 who are reading below their expected level. (Atlantic would eventually invest \$12 million in building Experience Corps into a national program.) “With Experience Corps,” Mr. Freedman reflected in 2011, “our interest all along was primarily in the social impact of the work the [older] individuals are doing. Our whole interest in this new field and new stage of life is all about seizing an untapped talent pool for pressing social needs.” In contrast to conventional volunteer positions, which were too often designed to keep volunteers occupied and to complete rudimentary, low-skill tasks, Mr. Freedman described Experience Corps as focused on “taking advantage of people’s talents, knowledge, life experience,” and doing work that makes society better. “We believe that’s what adults want in this new stage,” he said, “and it’s what kids need. It’s not about volunteering as a virtue, it’s about opening up opportunities for people who want to be doing things that matter.”

### **Recognizing a need, defining a rationale**

In the 1990s, Atlantic had begun supporting efforts to promote that kind of civic engagement among older Americans, though these early grants were a relatively small part of a much larger program to promote volunteerism and strengthen the voluntary sector generally. Other grants at the time were also aimed at improving the quality of life for older people, but those tended to focus more on health than on opportunities for productive activity. In 2001, however, the Atlantic Board decided to narrow the scope of its grantmaking worldwide and focus its resources more intensely on four areas: children and youth, population health, reconciliation and human rights, and aging. Under this fourth banner came a major commitment to support opportunities for meaningful, active civic engagement in the later years of life.

A prime source of inspiration for the idea arose from recent research, funded by the John D. and Catherine T. MacArthur Foundation, into the key factors that determine a person’s quality of life in older age. In 1998, results of the MacArthur study were published in an influential book, *Successful Aging*, by John W. Rowe and Robert L. Kahn, which defined “success” in later life as “avoidance of disease and disability, maintenance of high physical and cognitive function, and sustained engagement in

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<sup>8</sup> Marc Freedman and Phyllis Moen, “Academics Pioneer ‘The Third Age,’” *Chronicle of Higher Education*, April 29, 2005, accessed online 30 January 2012 at [http://www.civicventures.org/publications/articles/academics\\_pioneer\\_the\\_third\\_age.cfm](http://www.civicventures.org/publications/articles/academics_pioneer_the_third_age.cfm).

social and productive activities.”<sup>9</sup> Drs. Rowe and Kahn argued that this third element — maintaining connections with family and community, working, volunteering, and learning — was critical to achieving the other two goals. The term “engagement,” prominent throughout the book, soon became a touchstone in scholarly and clinical writing about the later stages of life, and by 2001 it formed the core of Atlantic’s Ageing Programme.

In fact, the effort to promote civic engagement was one of the Foundation’s earliest commitments under its new four-program structure. Well before the final development of plans for the other three programs, the Board in 2001 had approved a strategic plan on aging in the United States that sought, as its first and largest initiative, “to improve the lives of older persons by ... expanding the range and improving the quality of opportunities for meaningful civic engagement by older adults.” The plan had been developed through a lengthy process in 2001 that included a survey of experts in the field and the deliberations of a special task force composed of senior staff and outside advisers. It began with the observation that American foundations had done relatively little in the field of aging — especially when compared with the expected ballooning of the older population — and that they had done next to nothing to promote civic engagement and purposeful activity specifically. “No large national foundation has focused its resources on aging as an opportunity and older adults as resources,” the plan observed. “Education and training [are] somewhat better represented, but the foundation response [is] still inadequate.”

Galvanizing a field of civic engagement among older adults — a goal that had been championed, at that point, only by a few pioneers such as Mr. Freedman — struck the task force as a unique opportunity. For a foundation like Atlantic, seeking to make a significant difference by aiming major resources at strategically promising targets, it would be the kind of “big bet” favored by Atlantic founder Chuck Feeney. It was a neglected area of great need, with potential to affect millions of people. “The older population — commonly portrayed as a burden to the nation and a drain on future generations — is a vast, relatively untapped social resource,” the plan continued. “If these individuals could be engaged in ways that fill urgent gaps in society, the result would be a windfall for American civic life in the 21st century. It also might lead to a transformation of what it means to age in this country. This is a field-building opportunity for Atlantic.”<sup>10</sup>

At the time, the expected total budget for all aging-related activity in the United States was set at \$243 million between 2002 and 2007. Of that amount, the focus on civic engagement was projected to receive \$183 million, amounting to more than three-quarters of the Ageing Programme. (In reality, total spending on aging in those years ended up being significantly less than was budgeted, partly because of

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<sup>9</sup> J.W. Rowe and R.L. Khan, *Successful Aging*, New York: Pantheon Books, 1998, p. 439.

<sup>10</sup> All quotes from the plan are from Brian Hofland, “Strategic Plan for the Ageing Programme of The Atlantic Philanthropies (USA),” 15 January 2002, pp. 1-2

overall reductions in Foundation spending in the aftermath of the 2001 recession and the later downturn that began in 2007. But even with the reductions, civic engagement remained close to three-quarters of the total aging budget.) The plan called for grants in three areas: expanding volunteerism, improving access to employment, and promoting lifelong learning.

Although the Board of Directors approved the plan by the end of 2001 and major grantmaking began early the next year, by the end of 2002 Directors were raising a question that was to resurface several more times over the initiative's eight-year lifespan: How can we be certain that the Foundation's mission — "to bring about lasting changes in the lives of disadvantaged and vulnerable people" — will be fully reflected in the grants for aging? Most older Americans, after all, were not materially deprived, and older people as a political force were considerably stronger in the United States than in many other western countries. In what way, then, would the program serve "disadvantaged and vulnerable" older adults?

The director of the Ageing Programme and principal author of the strategic plan, Brian Hofland, addressed these concerns at the Board's first meeting in 2003 with a one-page note on "The Concept of Disadvantage in the U.S. Ageing Programme." He argued, in effect, that material well-being was little defense against the stifling effects of ageism. "As a class," he wrote, "nearly all older persons are disadvantaged with regard to the opportunities available to become engaged in society through volunteerism, employment, lifelong learning, and empowered consumers and with regard to being viewed as resources for others in society. To exclude middle- and upper-income persons from grant projects within this component would be to exclude large numbers of older persons who are potential resources for society and would limit the achievement of the goals originally set for the program."

Nonetheless, Dr. Hofland suggested, "The Board's desired focus on disadvantage can be achieved through support of projects, where possible and appropriate, in which service to some segment of disadvantaged and vulnerable persons is an element." As an example, he cited Experience Corps, which had just received a \$5 million Atlantic grant six months earlier, and which focused on lower-income volunteers and disadvantaged children.<sup>11</sup> The answer seemed to suffice; in any case the topic was not discussed in any detail for three more years.

Dr. Hofland's short statement to the Board — consistent with a general preference for brevity in Atlantic Board documents — barely skimmed the surface of the Aging Task Force's actual thinking on the subject of age and disadvantage. Research on the effects of ageism was by then plentiful, and the Task Force had considered a substantial sampling of it. Other research, which the group had also reviewed, was beginning to document the harmful physical and psychological effects of social

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<sup>11</sup> Both quotations are from Appendix C of Colin McCrea and Brian Hofland, "Task Force on Ageing: March 2003 Recommendations to the Board," *The Atlantic Philanthropies*, 2003, p. 18.

isolation and feelings of uselessness, both of which are associated with a lack of community engagement and productive activity in later life.<sup>12</sup>

Task Force members also calculated that changing public opinion on the potential of older Americans would require not only good individual programs, but the construction of a new and growing field of interrelated activity. What was more, they saw this field as needing the accelerating push of a social movement — an effort to change hearts and minds through the gathering of energy and enthusiasm across wider and wider circles. If that was possible — it was the most ambitious of the initiative's big bets — it would have to start, as most movements have done, with at least some advocates and role models who are not themselves disadvantaged, but who by their enterprise and example help raise the bar of expectations for those who follow. Nonetheless, all of that reasoning, as Dr. Hofland put it some years later, “was in our minds and in the logic of what we were trying to do, but it wasn't ever laid out to the Board or to anyone else in any detail.”

### Envisioning a field

Some further elaboration of a program model and theory did come later, with the arrival in late 2003 of Laura Robbins, a former program officer at the John A. Hartford Foundation, a national funder of health care for older Americans, as Atlantic's principal program executive for civic engagement. Ms. Robbins remembers, soon after her arrival, surveying the field of civic engagement for older adults and feeling as if she were stepping into a kind of wilderness: “The field barely existed, and it received little funding attention, before Atlantic decided to make a big commitment. There were a small number of individuals and organizations that saw themselves as an older-adult-civic-engagement ‘field,’ but there was not much linking them together except a general impression that they had some goals in common.” The solid program models — those with well-thought-out purposes and methods, strong organizational management, and vigorous leadership — were not only few, but small and scattered. Most had little or no prospect of expanding, reaching more people, and being replicated by other organizations. Almost none of them had reliable sources of money or much influence in government or philanthropy. Each of them knew little or nothing about the others.

The initial program strategy had made clear that the initiative was meant not only to demonstrate effective ways of engaging older Americans, but to weave the disparate activities into a coherent field, with all the necessary elements for expanding, strengthening, and refining its practices over time. “But there was no map for how to get there,” Ms. Robbins recalls. “So I started by making a chart, showing what I thought of as the basic elements, or stages, of how society changes.” Running across the top of the chart were ten stages of development for a social movement, from the most preliminary to the most advanced. Running down the side of the chart were the main subsets of activity that the initiative hoped to engender: volunteerism,

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<sup>12</sup> For an excellent summary of this literature, see Daphne Blunt Bugental and Jessica A. Hehman, “Ageism: A Review of Research and Policy Implications,” *Social Issues and Policy Review*, vol. 1, no. 1, 2007, pp. 173-216.

employment, and lifelong learning. Ms. Robbins put a check-mark in each box of the chart where some strength had begun to surface, and two check marks where there were signs of maturity. The chart looked like this:

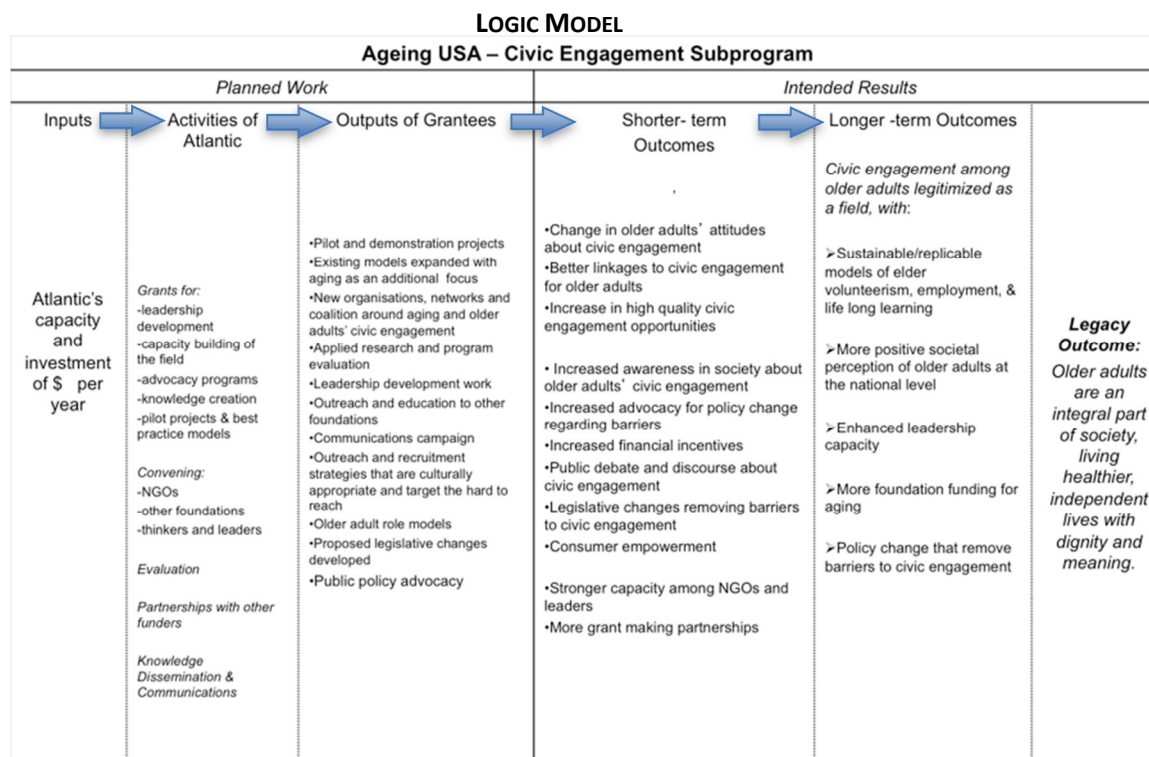
	Societal Recognition of Social Change Needed	Conceptual Model of Change Developed	National Leadership Emerged	Local Leadership Emerged	Institutions Implementing Change Identified	Best Practice Models Available	Best Practice Models Disseminated	Networks of Change Agents Coalesced	Financial Incentives for Change	Political Incentives for Change
Civic Engagement	✓	–	✓	–	–	–	–	✓	✓	–
Volunteerism	–	–	✓	–	–	–	–	✓	✓	–
Work	✓	✓	✓	–	–	–	–	–	✓	✓
Lifelong learning	✓	✓✓	✓	✓	✓	✓	–	✓	✓✓	–

“There were very few check-marks,” she says. “Some field-building consists of taking a lot of assets and linking them together. Here, we had a few assets, but we would really have to start by creating a lot of the basic necessities. So the idea was to move along that string of columns and start populating the boxes with checkmarks.”

Philanthropy, at its best, has had notable successes in field-building. Environmentalism, the women’s movement, community development, and microfinance, for example, all drew early sustenance and credibility from major foundation support. But these were painstaking, often slow-moving accomplishments; most took shape over decades, not years. Atlantic did not have decades to build a field of civic engagement; it was on a deliberate course to expend its full endowment by 2020, with its last grant commitments likely to be made by 2016. “The idea,” Ms. Robbins said, “was to set enough activity in motion in the years we had left so that there would be [a platform] for others to build on.”

In 2004, Dr. Hofland and Ms. Robbins returned to the Board with an update on civic engagement, including a Logic Model of the type on which all the Foundation’s programs were designed and governed. “The reasoning of the Logic Model was drawn from those categories running across the top of the chart,” Ms. Robbins explains. “The first outcome [in the fourth column] is about changing public opinions, public perceptions, about the value of older adults — the opinions of older adults themselves, and the broader public perceptions. The best practices and dissemination and networking I grouped into a set of Atlantic activities and outputs from grantees. And the longer-term outcomes were the things we thought we could reasonably accomplish, or at least get substantially underway, in the time we had left. This wasn’t scientific, it wasn’t vetted across the whole field. But it was an outline of how we expected to proceed, and it was based on a lot of conversations with people at the front lines and a lot of reading and reflection. It was our assessment at the time of what was needed.”





With the Board's approval of the Logic Model, the five "Longer-term Outcomes" became the basic strategic architecture of the program. Their overarching purpose was to establish civic engagement as a legitimate field of activity, characterized by five essential features:

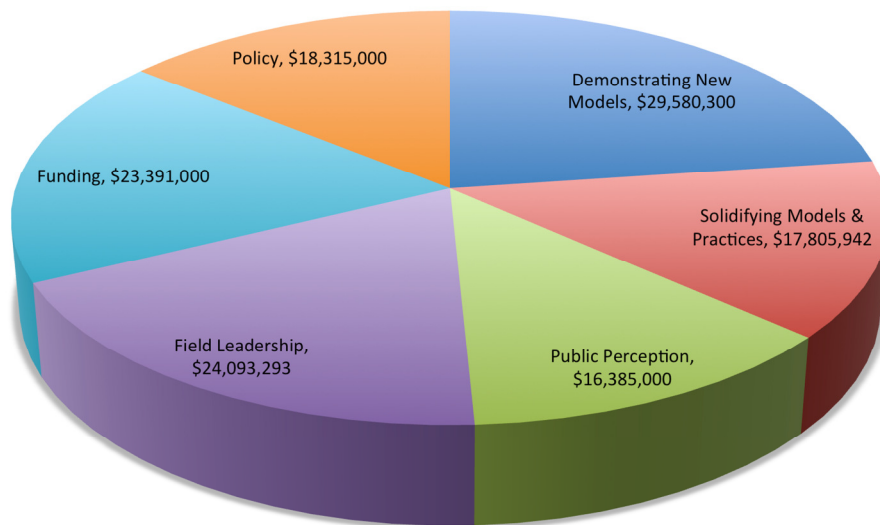
- sustainable, replicable programs to help older people volunteer, pursue careers, and continue to learn
- a more positive public image of older people nationwide
- leaders in the field capable of advancing the agenda further
- more financial support from other foundations, and
- an ability to influence public policy and produce changes that encourage and reinforce all these factors.

These five outcomes then became the main categories under which Ms. Robbins and her colleagues thought about grant opportunities and by which they analyzed the progress they were making. Although many grants touched on more than one area, most were aimed primarily at one or another of these aspects of the field. Consequently, the best way to understand the program and how it worked in practice is to view it through these five lenses. The next sections examine each purpose separately and then consider how they fit together.

### Demonstrating and replicating model programs

The first, and by far the largest, line of grants in Civic Engagement was aimed at seeding models of successful engagement of older Americans in volunteering, employment, lifelong learning, or some combination. The theory was that these activities could, if given enough time, careful execution, and convincing evaluation, prove the validity of the concept and inspire other organizations and funders to expand on it. Over the eight years of grantmaking, the program committed more than \$47 million to support models of this kind. Of that amount, close to \$30 million was devoted to launching or developing new approaches and methods, with the remaining \$17 million aimed at helping to scale up the more promising ideas or to instill them more broadly across the field — a goal that Atlantic consultant Alan Pardini has summarized as “field-wide adoption.”

**Categories of Civic Engagement Grants, 2001-2011**



Within this overall body of demonstration grants, the largest single purpose was to forge a stronger link between older Americans and the many areas of civil society that are starved for talent, energy, and affordable skills. Although the initial program strategy of 2002 placed roughly equal emphasis on engaging older people in employment, education, and volunteering, it is the last of these that eventually drew a large plurality of resources and attention, amounting to roughly 46 percent of the money in the whole program, and nearly two-thirds of the grant dollars devoted just to demonstrating and promoting new models.

One key reason for this emphasis on volunteering was what several participants in the program described as a chronic mismatch between the assets of older Americans — including both their available time and their accumulated professional and life skills — and their actual role in the voluntary sector. Looking back on the early years of Civic Ventures, Marc Freedman says that for many years he didn't even think of his organization as part of an "older adults" field. "For us," he says, "this was about solving societal problems, and older adults were a huge human-talent stream that wasn't being tapped — it was this underappreciated resource that could be, and wanted to be, making a much bigger contribution." Although Atlantic's vision for the program focused much more on the needs of older adults than on other societal needs, Brian Hofland's original strategic plan discussed the possible contributions of older volunteers in terms that echoed Mr. Freedman's: "the older population ... is a vast, relatively untapped social resource. If these individuals could be engaged in ways that fill urgent gaps in society, the result would be a windfall for American civic life in the 21st century."<sup>13</sup>

Immediately following that sentence, the strategic plan added a second reason for focusing on volunteering. "Something else might be accomplished along the way," it predicted: "greater fulfillment and purpose for the post-midlife years." As Dr. Hofland later put it, "All the evidence shows that people are healthier and more satisfied with their life the more connected they are with the community around them. Work and education provide some good ways of staying connected. But doing something that directly contributes to the common good is a powerful connecting force, and it's one that older adults say they would like to do more." The program, in other words, was meant to benefit both the volunteers and the people with whom they would work — first because civil society needed the additional talent and energy, but also because older people wanted socially beneficial outlets for their skills.

It's worth noting that "contributing to the common good" in later life is a value embodied by, among many other people, Atlantic founder Chuck Feeney, who has devoted nearly all his time and resources to philanthropy since he was in his 50s. Although Mr. Feeney was not closely involved in designing the Civic Engagement program, his example influenced many aspects of it. And portions of it clearly resonated with him.

One Atlantic employee recalls an afternoon when Mr. Feeney visited a team of Experience Corps volunteers in Harlem that had been funded under the Civic Engagement umbrella. "It was a group of mostly African-American women in their 70s," the staff member said, "working with children in elementary school, in the first to third grades, helping them with reading four days a week. So it's a significant time commitment for the tutors, who get something like \$40 a week — just enough to cover their transportation and lunch costs. We all got together in the school library

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<sup>13</sup> Brian Hofland, *op. cit.*, p. 2.

— all of us sitting on little tiny chairs designed for kids, all these adults, including Chuck. And the women were all leaning in, telling him about their experience and the difference it was making for the kids, and how they were learning things that they then could bring home to their own grandchildren. And Chuck and the women all seemed to be relating to each other as if they were neighbors. They evidently saw something in each other, a life experience they had in common, and the women spoke with great feeling about how important it was for them to be doing something that makes such a difference. There was a real community around that table — all of them, including Chuck, doing something in their later years to give back, and all of them sharing the satisfaction of it. It wasn't wonks sitting around a table talking about policy; it was people sharing their own experience."

Experience Corps eventually received a string of Atlantic grants to help it expand, totaling more than \$12 million, between 2000 and 2009. John Gomperts, who worked with Mr. Freedman at Civic Ventures and led Experience Corps from 2003 through 2009, describes it as "a classic example of taking the basic elements of an idea — kids who need tutoring, older adults who have time and skills and maybe raised children themselves, and who really care — putting those elements together in an efficient way that gets people what they need, that makes a difference, and that you can evaluate."

Experience Corps was, in fact, evaluated in an extensive and rigorous study conducted by the Center for Social Development at Washington University in St. Louis. In a randomized controlled trial involving 23 schools and nearly 900 children in grades 1 to 3, researchers found that students tutored by Experience Corps volunteers "made statistically greater gain over the academic year on passage comprehension and on assessments of grade-specific reading skills," and that "in general the effects of the program were consistent across subgroups of students. That is, the program impact was the same no matter what the gender, ethnicity, grade, classroom behavior, or English proficiency of the students," though improvements in comprehension were weaker among special education students than among all others. Overall, the evaluators reported, Experience Corps "had statistically significant and substantively important effects on reading outcomes."<sup>14</sup>

Moreover, the effect on the volunteers was likewise pronounced. "Participation in [Experience Corps] produced positive health outcomes," the evaluators concluded, adding that adult tutors "had a reduction in depressive symptoms and functional limitations over two years of program participation, while the comparison group experienced an increase in these two measures over a two-year period."<sup>15</sup> A later report added that Participation in Experience Corps tended to be followed by a

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<sup>14</sup> Nancy Morrow-Howell, Melissa Johnson-Reid, Stacy McCrary, Yung Soo Lee, and Ed Spitznagel, "Evaluation of Experience Corps: Student Reading Outcomes," Center for Social Development, George Warren Brown School of Social Work, Washington University in St. Louis, January 2009, p. 3.

<sup>15</sup> Nancy Morrow-Howell, Song-lee Hong, Stacy McCrary, Wayne Blinne, "Experience Corps: Health Outcomes of Participation," Center for Social Development, George Warren Brown School of Social Work, Washington University in St. Louis, February 2009, p. 2.

higher rate of subsequent employment and volunteering. “These findings,” they concluded “suggest that participation in EC motivates and enables older adults to become more engaged in work and community activities. Further, program participation can raise awareness about public issues like education and activate older adults to become more civically involved.”<sup>16</sup>

The program’s success helped assure it a stable, long-term home when it was adopted by AARP (formerly the American Association of Retired Persons) in 2011. More than any other Atlantic initiative under the Civic Engagement program, Experience Corps has succeeded at the ultimate goal that the logic model had set out for it: becoming a large-scale, nationally influential program with the wherewithal to continue functioning long after Atlantic funding ended.

Another prominent line of grants to promote volunteerism went to the National Council on Aging, whose *RespectAbility* initiative received close to \$7 million from Atlantic between 2003 and 2010. But in this case, the purpose was not primarily to launch new programs and practices to help older adults volunteer, but to cultivate, classify, and promote these practices to more nonprofits nationwide. “Too many nonprofits focus on scarcity,” an NCOA report on the initiative reported, “and fail to see the potential bounty in front of them.” Many human-service organizations, the report noted, persist in viewing older Americans as a dependent and needy population — more a target of services than a provider of them. These organizations lack the awareness and skills to recruit and manage senior volunteers effectively, and often need to be persuaded that such volunteers could produce valuable benefits if used wisely.

The *RespectAbility* team developed a sophisticated mechanism for measuring the cost and benefits of older volunteers’ work and applied it to 22 exemplary programs. “While it takes investment on the part of nonprofits to attract, engage, and manage leadership-level volunteers,” the report concluded, “the return on that investment is strikingly impressive. Participating organizations received an average return on investment of nearly 800 percent.” With these findings and other promotional efforts, NCOA became a centerpiece of the Atlantic effort to promote the idea of senior volunteerism not only to older adults, but to the organizations and programs to which they might wish to dedicate their time.

Despite the preponderance of emphasis on volunteerism in the program’s early years, later grants under the heading of models and demonstrations increasingly concentrated on ways of helping older people pursue careers and lifelong learning. Civic Ventures, for example, received \$10 million in a separate, five-year line of support for its efforts to promote the idea of Encore Careers — jobs in later life that satisfy some long-neglected interest, or that provide greater flexibility in scheduling

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<sup>16</sup> Nancy Morrow-Howell, Stacey McCrary, Yung Soo Lee, and Amanda McBride, “Experience Corps: Pathway to New Engagements,” Center for Social Development, George Warren Brown School of Social Work, Washington University in St. Louis, April 2011, p. 2.

or location, or that contribute to some higher cause. In another case, the Foundation contributed \$2.1 million to the Conference Board (2002-09) to sponsor and disseminate practical business information on ways of valuing and managing a mature workforce. The Partnership for Public Service received \$3.2 million over five years (2007-2011) to help federal agencies boost their recruitment and hiring of older civil servants.

Atlantic also provided \$3.5 million for a major national expansion of the Independent Transportation Network, a service to help older people travel around their communities, whether for work or personal engagements, once they are no longer able to drive regularly. Besides being a convenience for older passengers, the program also provides a community-service opportunity for older drivers. Most of the Network's transportation providers are themselves older adults. In exchange for their services, the drivers receive credits that they can redeem later, when they or their families need transportation, or that they can transfer to others in their community. A 2010 evaluation by the University of Southern Maine found that the program has a "positive impact ... on quality of life among customers, family members of customers, and ITN drivers."<sup>17</sup>

In total, roughly 12 percent of the models-and-demonstrations grantmaking was devoted to employment, 16 percent to learning, and 8 percent to activities, like the transportation network, that crossed the lines among education, careers, and volunteering.

Looking back on this record, Brian Hofland now believes that it might have been wise to have emphasized employment and learning sooner and more forcefully than the program originally did. Given the profound changes to career and retirement planning that came about after the financial collapse of 2008, Mr. Hofland now believes that "especially for people of low income, we should have been focused more on employment. If we had, Civic Engagement might be understood better today as something that's still relevant in times of economic hardship. If you have to make a career change and re-tool later in life, or even if you just want to, it's a lot easier for you if you've been high-income. You can get coaches, you may have connections, you have means to do things. For lower-income people suddenly facing the need for a life- or career-change, it's slim pickings. ... Looking back on it, I wish I had emphasized that more."

Yet other observers believe that the emphasis on volunteerism was not a strategic miscalculation, but an accurate reading of real demand for services and programs out in the field. Alan Pardini, a consultant whose firm manages the Community Experience Partnership, the program's second-largest recipient of total funds (described in a later section), saw the emphasis on volunteerism as a natural reflection of what older people and community organizations in the field were

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<sup>17</sup> Richard H. Fortinsky, "Final Report to The Atlantic Philanthropies," Edmund S. Muskie Institute of Public Affairs, University of Southern Maine, July 2010, p. 8.

seeking. “The opportunities we found leaned much more heavily toward volunteering, making use of the so-called ‘experience dividend’ that older adults could bring to the field. Atlantic worked hard to maintain a balance with [activities that emphasize] work and learning, but the preponderance of what came to the top was in volunteering.”

In any case, both grantees and program staff agree that all the grants in this category, whether technically aimed at volunteering, employment, or some other activity, were essentially seeking to overcome a single, common obstacle: the perception that older people are not primarily an asset to society but a burden. Laura Robbins summarizes this point as a case of perceptions determining the limits of opportunity. “When we started in this area,” she recalls, “a majority of the population viewed older adults as frail, in bed, waiting to die. While in fact more than 70 percent are independent. Now, if you view a group of people as dependent and helpless — even if you consider them very important and want to help them — you’re not going to be looking for ways to recruit them as volunteers, or hire them, or try to break down barriers to their making a full contribution. You don’t get any of those results unless you first change the perception.” Whether the emphasis ultimately is on jobs, on volunteering, on learning, or on any other aspect of a productive life, she says, “the very fact of approaching this on the basis of assets rather than needs is a fundamental change in the way society deals with older adulthood.”

### **Changing public perception**

Besides investing in new program models, Atlantic also sought to have a more direct effect on public attitudes toward older age — including older people’s own view of the possibilities available to them. As Ms. Robbins explained, this was close to the heart of the Civic Engagement rationale: If Americans thought more expansively about the contributions older people could be making, opportunities for them would broaden, and older adults would have less need for supportive programs to help them pursue a new career, to volunteer, or to enroll in education and training. But changing public perception is a difficult, long, often risky, and usually expensive endeavor. It would require influential and patient allies, skillful leadership, and continued commitment long after Atlantic had left the field.

Fortunately, at about the same time that Atlantic executives were seeking media experts and allies to help disseminate positive messages about aging, a few leaders in public broadcasting were similarly looking for ways to develop quality programming for older audiences. Jim Pagliarini, the president of Twin Cities Public Television and a 30-year veteran of public TV, had recently been chosen to lead a national strategic planning exercise for the nationwide Public Broadcasting Service. In that role, he soon found himself pondering the same demographic data that had drawn Atlantic into the aging field. “During that planning project, I became really intrigued with the coming age boom,” he says, “and I was feeling a lot of change and energy in how people were thinking about aging.” Mr. Pagliarini, whose father was



then in his 80s, had a firsthand window on what older audiences might expect from public broadcasting, and enough professional expertise to know that current programming was unlikely to meet those expectations. U.S. public television had achieved early distinction in educational programs for children, and remains in the forefront of that market, “so I asked what it would mean if public television made the same kind of commitment to helping this age boom navigate the later stages of life, in the same way that we had for kids.”

That question, beginning in 2004, led him to seek out foundations that might be interested in older people, and eventually brought him to Laura Robbins. The result was a series of Atlantic grants to Twin Cities Public Television totaling \$6.2 million beginning in 2005 and scheduled to last through 2014. The grants provide for the development of various kinds of video and web content on the possibilities of life’s later years. They were the Foundation’s first concerted attempt to extend the message of civic engagement beyond the circle of program practitioners and experts and to direct it at a general population. A seminal Twin Cities project was the production of a television series titled *Life (Part 2)*, which aired nationally on PBS during the 2006-07 and 2007-08 seasons. That was followed by the creation of an innovative web-based public media system called Next Avenue Workshop, focused on the interests and opportunities of older Americans.

Inspired in part by *Sesame Street*, PBS’s flagship educational program for children, Next Avenue seeks to be a source of education, social interaction, and practical guidance for older Americans. Shortly before the site was launched in 2012, a publicity statement promised that Next Avenue will:

- provide the information and connection to resources that people need to age vitally and with independence;
- offer opportunities for people age 50+ to connect with each other; and
- enable older Americans to take action on issues that are important to them, to their families, and to their communities.<sup>18</sup>

One reason for the new emphasis on the Internet, rather than television, is that *Life (Part 2)* proved to be a promising but costly undertaking that could not be continued once the startup funding from Atlantic and the MetLife Foundation ran out. The program “reached millions of households” and was “building awareness and attempting to shape public perceptions of older adults,” according to a 2011 evaluation by Jim Hinterlong of Virginia Commonwealth University,<sup>19</sup> but it drew almost no interest from corporate sponsors when foundation funding ended. The program’s brief history makes for a tantalizing but ultimately cautionary lesson in

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<sup>18</sup> “From Sesame Street to Next Avenue,” web page at NextAvenue.org, provided by Twin Cities Public Television, Inc., accessed November 2011.

<sup>19</sup> Jim Hinterlong, “Establishing and Building the Field of Civic Engagement and Aging: Evidence of Success, Critical Challenges,” Virginia Commonwealth University, July 19, 2011, pages 1 and 12.

the slow, difficult process of using mass media to create social change. “The practical reality,” says Jim Pagliarini, “is that there’s so little shelf space in [local public TV] stations’ schedules, and stations were just having trouble finding a place for it in their lineup. So that’s when we changed from a television-based strategy to a web-based strategy. If you want to create a way for people to get engaged, the medium for that is the web. Television shows are a good way to distribute information, but it can be a pretty passive medium.”

Despite the end of Atlantic’s direct support for public media efforts, Mr. Pagliarini believes the Foundation’s contribution to the field lives on, primarily in the relationships among grantees that were forged as part of the Civic Engagement initiative. “The cool thing in the Atlantic model,” Mr. Pagliarini says, “is that they asked us to be a communications resource for organizations all across this field, and we are to this day. And everyone we met through Atlantic is working with us on Next Avenue.”

Alongside its public media effort, Atlantic’s other major attempt to influence public attitudes toward aging has been through a series of annual awards presented by Civic Ventures, called the Purpose Prize. Established in 2005 with support from Atlantic and the John Templeton Foundation, the \$100,000 and \$50,000 prizes recognize Americans over 60 who have made outstanding contributions in solving social problems during their Encore Career. The increasingly well-publicized prize<sup>20</sup> has been awarded to more than 300 people whose work, in the words of evaluator Jim Hinterlong, “serves to inspire others while leading real change in communities throughout the country.”

Although the principal purpose of the prize is to recognize and celebrate outstanding older Americans and the causes in which they’re involved, its longer-term aim is to change public expectations about the second half of life. “The story of the Purpose Prize,” Marc Freedman wrote on the Civic Ventures website, “is about upending conventional wisdom, beginning with the idea that an older nation means an inevitable period of declining innovation, entrepreneurship, and creativity. Prize winners and fellows refute that notion every day.”

Atlantic has awarded some \$8 million to Civic Ventures specifically for the Purpose Prize, in addition to other grants to support the organization’s core operations. Sara Lawrence-Lightfoot believes that the effect of the prize on the public imagination has been “galvanizing.” The annual award ceremony, and the publicity it attracts, creates what she describes as “a very dazzling and interesting moment, where the people who have won the prize are celebrated, and we learn about them — an identification, in a very visible and honoring way, of people who have made big

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<sup>20</sup> In the single month of December 2011 the prize was featured in *The Atlantic*, *Forbes*, *U.S. News & World Report*, and the American Public Media radio program *Marketplace*. For a longer list of recent coverage, see “Media Coverage of Encore Careers” at <http://www.encore.org/mediacoverage>.

changes in their older lives. So the word gets out that way. It has inscribed this idea on the landscape in a very media-savvy and policy-relevant way.”

Nonetheless, the consensus among Atlantic staff now is that beyond these special initiatives, the overall goal of altering public opinion may have been too broad and demanding to have been realistic, at least in the near term. Stacey Easterling, an Atlantic programme executive on the Ageing team, remembers discussions underway in 2007, when she joined the Foundation staff, about the possibility of a new media strategy aimed at attitudes toward older people: “There was talk of a marketing campaign to change public perceptions of older people and aging — public service ads, P.R. campaigns, major initiatives. And it was incredibly expensive, many, many millions of dollars. The whole thing ended up sinking under its own weight, because the dollar amounts were so overwhelming — far more than we could or cared to spend. And even for all that money, it wasn’t clear we would actually be able to move the needle. It was a huge risk and well beyond our means. So we chose to stay with more modest efforts like public television and the Purpose Prize — and with the expectation that the results of other work, like Experience Corps, would eventually contribute to new perceptions.”

Stephen McConnell, acting director of Atlantic’s Ageing Programme, added that public opinion is a moving target, and that the challenges today don’t necessarily match the ones around which Atlantic’s strategy was originally designed. “Today,” he says, “the real challenge isn’t generating sympathy for older people, but preventing a backlash among other demographic groups against the costs of aging and the amount of resources being devoted to older people. That’s a completely different problem from the one Atlantic set out to address in the strategy for civic engagement. So if we were continuing this work, we would have to not only make the [public-perception] goal narrower and more achievable, but we would need to refocus it to address the structural realities we’re facing now.”

### **Laying the groundwork for a functioning field**

The most fundamental challenge Atlantic faced in promoting civic engagement in the Third Age was to build a robust field of practice and policy — organizations, funding streams, networks, public programs — squarely focused on that objective. When the Foundation first gathered its Civic Engagement grantees, at a 2006 retreat at Tarrytown, New York, the initiative was already roughly four years old and included nearly two dozen grantees. And yet, as Laura Robbins remembers it, “most of them barely knew each other, and few of them had ever worked directly together. They saw their own work as important, but not necessarily a part of any larger movement. There were a small number of individuals and organizations that saw themselves as some kind of older adult/civic engagement ‘field,’ but they didn’t agree on exactly what that meant, or what the ‘field’s’ purpose was, or what organizations and activities it included. They spent a lot of time just working through what the field was — what it was meant to do, what its boundaries were. Was it really a field at all, or was it a movement? But by the end, they came out with

some common ideas and a recognition of what they needed to do that they couldn't each do individually, on their own."

The gathering at Tarrytown was just a tentative, early step on the long path to building a coherent, self-sustaining realm of practice. Several participants — though not all — considered it an invigorating, even galvanizing moment: the first formal opportunity for a group of natural allies to recognize their common interests, open channels of communication, envision some collaborative activity, and lay the early connections that could lead, eventually, to a durable learning network. Participants debated what an effective field of civic engagement for older adults would look like, what necessary elements of that vision currently existed and which were missing, and what kinds of resources and leadership would be required to draw the field toward that vision. With a graphic artist as facilitator, the group literally mapped out the necessary and desirable elements of the field they envisioned, suggesting various priorities and goals, and weighing the importance of each. Later, Atlantic shared this map and the participants' priorities with other funders interested in aging and civic engagement, in hopes of forging a long-term vision among the field's sources of money as well as among its practitioners. A second gathering of grantees and other civic-engagement organizations followed two years later, again in Tarrytown.

Jim Pagliarini of Twin Cities Public Television was one of the participants at both conferences, and considered them a constructive, clarifying experience both for him and for the group as a whole. "We were all working on different pieces of the puzzle," he said in 2011, three years after the final conference, "and [the Tarrytown gatherings] galvanized us as a unit, as opposed to a lot of projects and organizations working independently. We are still working with, and have relationships with, more than half the people who were there — which is pretty remarkable after such a long time. ... What Atlantic was trying to do, knowing they were eventually going to spend down their corpus, they wanted to seed and sustain relationships that would last when they were gone."

Tellingly, not every participant considered the event so consequential. One person — a major grantee who preferred not to be quoted by name — described it as "a lot of navel-gazing, like some kind of group-therapy session: Who are we? What do we think of each other? What is the meaning of life? A few minutes of that, and you start to wish you were having root-canal instead." This person's reaction (and one or two others', more mildly stated) illustrates a prime reason why field-building is such a slow and demanding process: It is, in reality, a bit like group therapy. Creating a unifying vision in the nonprofit world — in the absence of a sudden crisis or public clamor — demands a difficult group-psychological shift. Many people who have been pursuing their own, idiosyncratic passions and vocations have to come to see themselves as elements of some other, larger cause, and adjust their behavior accordingly. Earlier efforts by foundations to create new fields have typically taken decades to solidify. Community development, for example, took at least 20 years to jell as a recognized field. After-school programs took roughly as long (and some

might say the jelling process is still not complete). The historical journey from John Muir to Rachel Carson lasted 70 years, and the emergence of a well-integrated field of environmentalism in the United States arguably took another ten years (and massive public and philanthropic investment) beyond that.

Yet the early steps in Atlantic's eight-year effort to build a field of civic engagement of older Americans appear to have paid off, at least thus far. Evaluator Jim Hinterlong, in a 2011 assessment, found that "civic engagement for older adults has emerged as a new field of practice — albeit with a still-evolving vocabulary, architecture, and agenda for action. We cannot predict whether this field will continue to grow in size and influence; but we show that it has many of the elements found in more mature fields." Noting that, at this early stage, constituent organizations still do not share any recognized canon of established practices and standards, Professor Hinterlong cautions that "the diversity of these initiatives does complicate efforts to argue that any identifiable group of [civic-engagement] actors is using a 'set of common approaches.' We suggest that those working to promote civic engagement among older adults are connected through a common vision and use strategies tailored to the specific circumstances of their communities, member/participant populations, or targeted social concerns."<sup>21</sup>

As part of its field-building strategy, Atlantic devoted considerable resources to drawing essential allies — particularly leading institutions and networks of critical importance to older people — into the civic-engagement fold. For example, to promote a more positive approach to aging among physicians and scholars in gerontology, Atlantic supported the Gerontological Society of America (\$1.4 million from 2004 to 2011) and the American Society on Aging (\$800,000, 2005-09). To enlist churches and the clergy, the Foundation provided just under \$1 million (2005-08) to the Leadership Network, a group of senior ministers and staff of large congregations, to launch a Pilot Project on Civic Engagement Among Older Adults.

The largest effort of this kind was aimed at community colleges, which offer a critical entryway to new skills, encore careers, and lifelong learning — and which, most critically, tend to be affordable and flexible in their scheduling and requirements. With a four-year \$3.2 million grant in 2007, Atlantic funded the American Association of Community Colleges' Plus-50 Initiative, to help community colleges to develop programs specifically for older learners. It provided money and technical support for 13 two-year institutions to offer courses specifically aimed at career development, learning, and volunteering for students over 50. Through the use of field-wide conferences and "ambassadors" who spread the word to other institutions, the project was later expanded to include "affiliate colleges" that formed partnerships with some of the original 13.

In working with member institutions, the Association "not only focused on expanding the *quantity* of offerings, but also fostered innovation in *how* the colleges

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<sup>21</sup> Hinterlong 2011, pp. 6-7.

met the particular needs and interests of this age cohort,” according to an interim evaluation in 2010. “Grantee colleges developed new courses and redesigned existing ones, as well as developing and expanding support services that enabled access to community college programming.”<sup>22</sup>

Given the timing of the project — at the start of the 2007-08 recession, just months before the collapse of Lehman Brothers — Association leaders soon chose to concentrate most of the Plus-50 Initiative on career and skills training. Nonetheless, seven of the 13 also developed new volunteering programs that worked both with older students and with local nonprofit organizations to arrange meaningful opportunities for student volunteers. By huge majorities, students reported in surveys that these placements not only provided satisfying work and a deeper involvement with their communities, but furnished new skills that in turn helped them explore new career options.<sup>23</sup>

“The Plus 50 Initiative has had tremendous impact on community colleges,” evaluators concluded in their interim report. “Data from the initiative show that grantee colleges have increased their portfolios of learning and enrichment courses, with dramatic growth in workforce training courses. ... Amidst expansion, which sometimes creates growing pains, and the economic downturn, which increased the demand for courses and services, colleges were able to maintain high-quality programming and services, and participant surveys demonstrated high satisfaction across the board.”<sup>24</sup> The initiative has since raised substantial funding from other foundations and is expected to continue to expand.

Taken together, the grants to the Gerontological Society and Society on Aging, to churches, the Conference Board, and community colleges, among others, represented a systematic effort to build up nodes of leadership on which broader networks of civic engagement could be built. But knitting those elements and others into an actual network would be a separate and longer task. To get it started, Atlantic encouraged a group of participants in the Tarrytown conferences to form a working group, initially informal, that came to be called Age4Action. It was, in the words of Sabrina Reilly of the National Council on Aging, “a central place or community for convening, sharing information, connecting, exchanging information and resources.” In 2009 Atlantic provided a small grant, channeled through NCOA, to launch the group and get it organized. Unfortunately, after Atlantic’s start-up grant ended in 2011, the organizers were unable to find any other foundation to take up the cause. The members plan to continue meeting as a voluntary association, but at this point it seems unlikely that they will be able to sustain the full momentum with which the group began.

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<sup>22</sup> “Plus 50: Impact Report,” LFA Group, November 2010, p. 3.

<sup>23</sup> *Ibid.*, p. 14.

<sup>24</sup> *Ibid.*, p. 27.

“All of this work,” Ms. Reilly suggests, “was really about sustainability — sustaining not just individual programs, but the sense of a whole field that was just dawning when Age4Action was formed. That needs to continue, somehow, or a lot of what we have accomplished is going to be lost.”

### **Building a funding stream, locally and nationally**

The difficulty in finding money to sustain Age4Action is emblematic of a broader problem for the future of civic engagement of older adults — a problem that will be familiar to any large foundation that has invested heavily in a new or little-known field. Atlantic’s support for civic engagement has so far outstripped that of any other funder, and its staff has exerted such influence in the way organizations think about the field that the concept has been all but branded as an Atlantic property. Other funders, notably the MetLife, New York Life, and Templeton Foundations, as well as a growing number of community foundations, have made significant contributions, relative to their size and their other interests. But with commitments averaging \$15 million a year, and often reaching over \$25 million, Atlantic’s investment in the field dwarfed all others and made it difficult for any other foundation to seek a strong or prominent role.

This problem was obvious from the beginning, and Foundation staff were at pains to share both the funding and the leadership mantle with other institutions as widely as possible. In fact, a core component of the initiative was aimed not at frontline organizations that serve older adults, but at funders who might support those organizations.

“Anywhere you went on this subject,” consultant Alan Pardini points out, “Atlantic was the big player in the room. So they were very concerned about branding from the very beginning. Brian [Hofland] and Laura [Robbins] were constantly emphasizing that this isn’t an Atlantic project, it’s a national need and a growing population. But if you look at the numbers, 85 percent or more of the resources going into the field were from one source. I’m not sure what we could have done differently there, except perhaps engage more potential funders earlier in the process. But we did engage them. And there’s clearly more [funding] going on now than there had been five or ten years ago.”

One significant way that Atlantic sought to recruit more foundations to this field was through a project called the Community Experience Partnership, managed by Mr. Pardini’s consulting firm, Community Planning & Research, LLC. With grants totaling more than \$17 million between 2006 and 2013, Atlantic created the Partnership to encourage community foundations to design, launch, support, and test new initiatives to engage older adults in locally significant activity. It was an attempt to take the principle of civic engagement to the local level, where communities could experiment with the idea and adapt it to their particular needs. The Partnership began in 2006 with a request for proposals that was originally meant to find ten community foundations that might have a plausible approach to broadening their



civic engagement funding. Applicants would be expected to match Atlantic's grants, and had to show that they were building civic engagement for older adults into the core of their philanthropy, not simply adding it as a detachable project. In the end, 30 foundations were chosen to participate, out of more than 60 applicants. They spent roughly a year designing initiatives, based on their own assessment of local needs and opportunities, and then, in a second phase, 21 of the proposed initiatives were funded for implementation. In the third phase, underway as this is written, nine finalists are receiving substantial support to refine and expand what they began.

"Why community foundations?" Laura Robbins asks rhetorically. "A couple of reasons: One was that we wanted to go where there was an established network. My experience told me you have to match a good idea with a network that already has a communication vehicle. Community foundations meet regularly and exchange information. So if we got a critical mass in that network, the message would spread faster. More importantly, what older adults do is very community dependent. So one model for all communities would not work. And who understands particular communities better than community foundations? The needs and opportunities would be most visible to them — and they have a steady investment in the communities. And Alan [Pardini] understood that this couldn't be a big national foundation coming in to tell them what they ought to do. We had to ask them what they needed to do, and then help them do it. And that is now happening."

Ultimately, however, the goal is not only to stimulate new funding from nine or even 30 community foundations; it is to promote the idea of civic engagement as an important, even necessary, part of *most* community foundations' missions — without the incentive of matching money from a national funder. It is too soon to gauge the odds of that success, as Mr. Pardini acknowledges, "but the degree to which the community foundations, especially the current nine, jumped in with both feet has really surprised me. The extent to which this has influenced their strategies and grantmaking philosophies is really striking. ... Remember, these are all one-to-one matching grants. So all nine have significant technical, financial, and reputational resources invested in it. So my guess is that when the [Atlantic] funding goes away, I can't see the program evaporating. I can see them maybe scaling back a bit. But we have made every effort to see that they have the wherewithal to continue."

At the same time that Atlantic was trying to stimulate local funding from community foundations, it was also working with its counterparts in national and regional institutions through the affinity group known as Grantmakers in Aging. From almost the beginning of the initiative, starting in 2002, Atlantic has channeled more than \$3.6 million to GIA, both to spotlight opportunities for other members to make grants in this area and to use the GIA network as a means of promoting philanthropy for civic engagement among smaller foundations. A central component of this effort has been the EngAGEment Initiative, in which the national group funds

regional associations of grantmakers to promote funding opportunities to their members.

“This is a resource for funders in regions to work together on aging initiatives,” Ms. Robbins explains. “A central part of our agenda was to get more funders involved with aging generally, not just limited to civic engagement. It was about changing philanthropy’s vision of older adults, from one based on need and dependence to one based on opportunity and assets. Civic engagement was a big part of that, and we expected that the more foundations worked in aging, the more we could point out the advantages of a civic engagement approach.”

### **Reorienting public policy**

The last and smallest of the initiative’s grant categories was the one aimed directly at improving public policy toward older Americans. But the comparatively small size of this component (officially \$18 million, about 14 percent of the total) understates the initiative’s effort on policy reform. Many grants that primarily fall under other categories also included a policy component. And much of Atlantic’s approach to advocacy rested on promoting the lessons and policy implications of the other branches of work, the results of program demonstrations and evaluations.

Several grantees that were funded to create or expand new programs were also deeply engaged in policy advocacy, for which the Foundation’s grants typically provided additional fuel. The most obvious example is Civic Ventures, for whom only a small grant in 2002 (\$78,000 for one year) was awarded primarily and explicitly for policy development and advocacy. Yet most of what Civic Ventures does is aimed at changing the assumptions that underlie public policy toward older people. So by the broadest reckoning, it would be arguable that part of Atlantic’s entire relationship with Civic Ventures, amounting to \$34 million over nearly 15 years, has helped lay the groundwork for smarter public policy on aging, among other goals.

Another example of how dollar amounts don’t tell the whole policy story is a relatively small grant in 2009 to policy consultant Brian Lindberg (\$446,000 for two years) to offer training and technical assistance in policy advocacy to other civic-engagement grantees. In this case, the grant amount measures only the cost of the training, not the extent of any the networking, planning, and advocacy that resulted from it — much of which may have been made possible at least partly by Atlantic grants, but those would have been classified under other headings.

In rare cases, Atlantic underwrote specific policy-advocacy campaigns directly. For example, a \$3.6 million grant to the Council for Adults and Experiential Learning (2008-2012) supported CAEL’s effort to work with the U.S. Department of Labor to ensure that older Americans are fully included in the Department’s WIRED program. WIRED (Workforce Innovation in Regional Economic Development) is a public-private partnership in job-training; it aims to match the skills of the local workforce

to the demands of expanding businesses — potentially a rich resource for people contemplating encore careers.

But much more often, Atlantic’s support has enabled leading organizations in the field to formulate and mobilize advocacy campaigns of their own, often with the express support and encouragement of Foundation staff. The clearest example of this was the field-wide effort, spearheaded by the Age4Action coalition of grantees, to promote improvements in the U.S. law that provides for various programs and research related to people over 50: the Older Americans Act of 1965. It was last reauthorized in 2006 and was up for renewal again in 2011, at which point Age4Action hoped to provoke a wide-ranging re-thinking of the Act’s priorities and provisions. To focus attention on the Act and on ways of improving it, Age4Action “conducted a nationwide fact-finding and listening initiative, in which it held a series of Idea Forums in six U.S. cities.”<sup>25</sup> The forums led to a set of nine core recommendations for improving the Act and making it more supportive of work, learning, volunteering, and leadership among Americans in their later years. All the critical steps in this process — the fact-finding initiative, the refinement of recommendations, the development of written materials, and the mobilization of people to bring the recommendations to members of Congress and their staff — were guided by consultants such as Mr. Lindberg, led by the Age4Action network, and informed by the experience, knowledge, and stature of the member organizations. Each of these was supported by Atlantic. But almost none of that support (again, with the exception of Mr. Lindberg) was classified as a “public policy” investment.

“We were not interested in setting policy priorities for the field,” says Laura Robbins, “so you don’t see many grants focused just on this issue or that issue. Our goal was to build the capacity of the organizations and the network to set those priorities and pursue them. So the grants provided the capacity; the grantees provided the advocacy.”

Another legislative achievement was the explicit inclusion of older Americans in the 2009 Edward M. Kennedy Serve America Act, which reauthorized and provides resources for various national service programs, including AmeriCorps. John Gomperts, who became director of AmeriCorps in 2010, was vice president of Civic Ventures at the time the Kennedy Act was past, and thus was part of the Age4Action network during its advocacy campaign for the provision. The Act sets a target of 10 percent of AmeriCorps funding for use in developing encore career opportunities for Older Americans. Mr. Gomperts describes this as “a major achievement, although one that was built on a lot of earlier advocacy by Civic Ventures and other organizations, and Atlantic was a major contributor to that. All the way back to the 2008 campaign, the President [then-Senator Barack Obama] was using the language of civic engagement for older adults; he repeatedly said that AmeriCorps isn’t just for young people, but for people of all ages. At this stage, the idea of older adults and

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<sup>25</sup> Age4Action Network, “Modernizing the Older Americans Act: Recommendations for the 112th Congress,” 2011, p. 4.

civic engagement is taking hold, in part because of that work.” Mr. Gomperts points out, however, that the change in official policy still needs to be followed by a change in demand for volunteers at the community level, where the older-adult volunteers would actually work. And that change is still progressing slowly.

Overall, despite the small amount of grant money expressly labeled as “advocacy,” evaluator Jim Hinterlong put three public-policy successes at the top of his list of major accomplishments for the Civic Engagement initiative in a 2008 interim report: inserting civic engagement provisions into the Older Americans Act; spotlighting it at the White House Conference on Aging; and increasing state-level support for older adults.<sup>26</sup>

Of these, the White House Conference on Aging, in December 2005, was arguably more detached from frontline activity and the day-to-day experience of older people than the other two. Yet if it is put to use for later policy development and advocacy, it could have far-reaching consequences. The Aging conferences occur only once a decade and tend to be broadly bipartisan. So the prominent presence of civic engagement of older adults as one of seven “policy tracks” resulting from the conference suggests that the issue could have some staying power as a feature of American policy, in many areas, as the Baby Boom retires.

#### **The initiative comes to an unscheduled end**

The original strategic plan for The Atlantic Philanthropies’ Ageing Programme — and thus for the civic engagement portion of it — was envisioned as a 15-year initiative, though the inaugural document provided details on only the first five years. The program was therefore due for a five-year review and renewal in 2007. At that point, however, Atlantic was undergoing a broader re-examination of its strategic direction under a new CEO, Gara LaMarche, who had taken office that April. To give Mr. LaMarche and his senior team time to review the Foundation’s programs, all program renewals were intentionally delayed for several months. In the course of the high-level review of priorities, some new themes and emphases — including a central, institution-wide focus on social justice — came to be established as guiding principles for the next round of strategic planning. How this would square with the goals of the civic engagement initiative was an open question.

In some ways, the issue of how civic engagement and social justice might fit together was a reprise of the earlier Board discussions about how “disadvantage” fit into the initiative’s strategy. In both cases, members expressed a desire that grants not focus solely, or even mainly, on the aspirations of the relatively well-off — those with successful careers, adequate pensions, advanced skills, or other built-in resources — but that they be primarily an effort to create opportunity for lower-income, disadvantaged people and communities. A 2006 revision to the Ageing Programme’s mission statement made that desire more explicit than it had been. But to some

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<sup>26</sup> Jim Hinterlong, “Ageing and Civic Engagement Subprogramme: External Evaluator Report,” Florida State University, February 25, 2008, p. 5.

extent, the program's essential thesis about ageism — that older people were disadvantaged as a group, and that the civic possibilities of the Third Age needed to be opened to people of every class — had held relatively firm.

There are strong arguments to be made on both sides of this issue. On one hand, evidence of ageism remains strong, even among civic and community organizations, and the potential contributions of older volunteers (of whatever class) could be a substantial untapped resource for improving the lives of disadvantaged people. On the other hand, there is no question that, as one Atlantic grantee put it, speaking anonymously, “we were trying to draw people with skills — teachers, accountants, lawyers, doctors — into volunteering and public-interest employment, because they would make a strong case that older adults are an underused asset that’s worth investing in. We wanted to come up with innovative models for putting people’s skills and talents to work and to change the perceptions of how they could be contributing to society rather than being wasted.” To prove the point, and to make the most visible possible impact, this grantee suggested, it was necessary to devote at least some deliberate effort to recruiting people with skills and means, as well as those with fewer advantages.

Viewed in either (or both) of those ways, was the civic engagement agenda consistent with an underlying commitment to social justice? Did it constitute a plausible response to material and social disadvantage? These questions might have made for a lively debate at the Board level, but unfortunately no such debate occurred, at least not explicitly or in detail. By the time the new strategic planning exercises began in early 2008, one staff member said, “it had become very clear that it wouldn’t be wise to come forward with more of the civic engagement work. We could have fought for it harder than we did, maybe; but that would not have been welcome, and it would probably not have been successful.”

The strategic plan drafted in mid-2008 and approved late in the year confirmed “significant changes for the Ageing Programme” and made little mention of civic engagement generally or of any of the five sub-categories specifically, other than the one devoted to public policy. On that one remaining item the plan drew encouragement from the accomplishments of the past several years (especially contributions to the Older Americans and Serve America acts), but it placed its principal emphasis on “enhancing the voices of older adults” in advocating for policy agendas of their own. The strategy specifically promised to “de-emphasize our focus on volunteerism,” and to increase “our emphasis on employment and other paid opportunities to enhance opportunities for low-income older adults and elders of colour.” Some months later, most of the civic engagement grantees received a letter informing them that their support would not be renewed beyond one year.

In this way, the initiative came to a largely unscripted end less than two-thirds of the way into its intended lifespan. As a result, momentum that appeared to be gathering behind the civic-engagement idea lost much of its driving energy. Evaluations underway in 2008 were in effect reoriented or rendered moot, and

organizations that had been pursuing strategies predicated on four or five more years of work were told, instead, to prepare to scale down immediately. The National Council on Aging disbanded its Civic Engagement Division within months, though it has continued to use civic engagement as a means of pursuing other goals, even if not as an end in itself. Other organizations that had been heavily dependent on Atlantic support debated how to shrink their operations or even, in one or two cases, considered closing their doors. Many organizations feared that Atlantic's premature departure from the field would discourage other funders.

Whether that happened or not is difficult to say, but some past funders are winding down their grants for civic engagement, few large new donors have emerged, and none has taken on the challenge of continuing to build a nascent field. Still, all is far from lost: Atlantic funding for community foundations under the Community Experience Partnership will continue to run until 2014, and many of the community foundations appear likely to continue their efforts beyond that. Grantmakers in Aging is continuing its EngAGement initiative, though without continued support from Atlantic. The Foundation decided, late in 2010, to make an additional three-year grant to Civic Ventures, the undisputed leader in the field, to ensure that it would have more time to round up funding or otherwise establish a secure future for its most important work. As for the rest of the field, however, the loss of momentum is palpable. Yet many believe that the progress made thus far is unlikely to be reversed, even if further progress will be more gradual.

"Atlantic was able to crystallize and consolidate some issues in the aging field," Steve McConnell, acting director of the Foundation's Ageing Programme, says about the cumulative effect of the civic engagement initiative. "And it helped to redefine the concept of retirement in later life, and the possibilities of volunteerism among older adults. Atlantic's work integrated a lot of disparate ideas, some of which were already out there but were not yet connected into a single body of thought. But the field — if that's the right word for it — is still seeking a definition. Even the people within the field don't yet have a common definition for it, and there's still a lot of fragmentary thinking about what it consists of. Still, Atlantic helped get the conversation going. The conversation isn't finished, and what has started won't be lost."

### **Conclusion: Lessons, Judgments, and Reflections**

At the beginning of 2012, in the online edition of *The New York Times*, a staff blogger posted a lengthy story on New York City's ReServe Program, in which older adults advise and tutor students in New York City schools, among other forms of public service. The program was created in 2005 by the Blue Ridge Foundation, which incubates nonprofit startups; by 2012 ReServe's website listed nearly four dozen foundations and several city and state agencies as supporters. Its expansion to up to seven more localities outside New York was supported in part by a \$2 million, two-year grant from Atlantic in 2009.

The headline on the *Times* blog post was, “In a Second Career, Working to Make a Difference.”<sup>27</sup> Although the story did not mention Civic Ventures, Atlantic, or, indeed, any broader social movement toward community service by older Americans, the phrase “second career” and the reporter’s emphasis on the untapped potential of civic-minded retirees could have come straight from a book by Marc Freedman or a paper by Laura Robbins. It was, as one observer of Atlantic’s programs put it, “a complete affirmation of what Marc and Atlantic have been doing for the last number of years.” The story trained its attention not on any benefits the program might provide to the older tutors and counselors — whom it treated as a skillful and valuable resource — but on the crying need among disadvantaged public-school students for the kind of help that comes from ReServe.

“Notice,” the person commenting on the article added, “this gives no hint that the idea of older people spending their time this way is at all cute or strange or heartwarming. It’s just a success story, a story about kids who deserve a break finally getting someone really dedicated to help them. It’s not warm and fuzzy about some nice old people finding something constructive to do. They’ve [i.e., Atlantic] got to take some encouragement from that. It’s entering the mainstream.”<sup>28</sup>

That may be, say some other grantees and experts, but if so, the phenomenon remains new, tentative, and fragile. As one veteran of the field put it, “Inventing something, creating something, is very hard work. When you’re absorbed in all the intensity and rhetoric of doing it, it feels like a juggernaut. It has the advantage of being a bright new shiny idea, ahead of the curve and so on. But making it into a success is long, grinding work. It loses some of the sharp edges and becomes a little less edgy and dynamic. To turn something intriguing into something normal takes years of doing the same thing over and over, and then more of it, and then making adjustments and doing that over and over. It’s slow and repetitive and it’s not sexy.”

Establishing outstanding model programs like ReServe is important, necessary, and remarkable, this commenter is quick to acknowledge. And “what Atlantic set out to do in making an idea real, creating some programmatic expressions of that idea, some policy reflections of it, all of that was actually quite successful. Not that each individual grant was successful, which almost never happens; but the totality of it truly made a difference.” And there are signs that it might be working, or at least that it can work. The problem, he adds, is that “there has not yet been a historic mind-shift about the capabilities, instincts, interests, and responsibilities of people in their encore career. We haven’t got there yet. We haven’t had a giant mind-shift akin to the mind-shift toward recycling paper and cans, for example. We’re still condescending towards older adults; the norms and conventional wisdom are that people should retire and be given services and all that. So on that big stage, we

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<sup>27</sup> Tina Rosenberg, “In a Second Career, Working to Make a Difference,” The Opinionator blog, *The New York Times*, posted 5 January 2012 at 10:00 p.m..

<sup>28</sup> To encourage commenters (especially grantees) to speak candidly about Atlantic’s role as a funder and leader in this field, interviewees were assured that evaluative comments would be quoted anonymously. Most respondents were willing to be quoted by name, but to conceal the identity of those who were not, all quotes in this final section are unidentified.



haven't succeeded. Now, it probably isn't realistic to imagine you could do that in six or seven or even ten years. But if we're stopping now, then we certainly can't go out declaring victory."

Though opinions varied on the long-term significance of Atlantic's work on civic engagement among older adults, most observers offered the kind of balanced, bifurcated judgment reflected in these quotations: (a) the initiative succeeded in essential, and *possibly* lasting, ways, but (b) its accomplishments are not yet necessarily durable or on a firm track. Surveying the field in 2011, evaluator Jim Hinterlong struck a similarly balanced note, documenting both a maturing field and a number of important areas that still suffer from a lack of cohesion, shared vocabulary, and common expectations:

We do find the [civic engagement] field has achieved progress in the areas of public policy, pilot and demonstration programming, communications and field-branding, and knowledge development through research. During this early phase of field establishment many different ideas, terms, and approaches to [civic engagement among older adults] have been promoted; some have been successful with certain constituencies, others have not. We assert that the lack of a universally-accepted definition of the concept and rapid pace and scale of policy and practice innovations confound attempts to reduce duplication and inefficiency. Moreover, they impede the exchange of information about field developments.<sup>29</sup>

Sorting through the assessments and reflections of the various people interviewed for this report, it is possible to distill at least six themes that ran through most people's observations. Many of them, like the comments just quoted, take a one-hand/other-hand approach, reflecting the unsettled nature of a still-young field confronting a hostile economy. Yet even if tentative and qualified, each of these themes reflects the carefully considered judgment of people steeped in the field, knowledgeable about Atlantic's role in it, and concerned about its future. And on balance, they paint a picture of important achievement and lingering potential.

**1. In Atlantic's initiative, the idea of "civic engagement" was defined broadly — encompassing not only community service, but also ordinary employment, education, and skills training later in life. This proved to be both a strength and a weakness.**

In its original conception, dating to 2001-02, the Atlantic approach to civic engagement placed equal emphasis on work, learning, and community service beyond age 50. In practice, the last of these three emphases quickly, and all but permanently, took center stage. But that happened without any explicit decision by the Board or senior management to downplay the other two activities in proportion. As one grantee put it, "the three-part construction of civic engagement always felt kind of artificial." Actual activity in the field — programs designed by grantees and

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<sup>29</sup> Hinterlong 2011, p. 13.

supported by community foundations and other co-funders — most often had community service at their core. Many of these programs did provide an income for the older people who worked in them, but typically below what comparable skills would have fetched in the conventional job market. As the same grantee put it, “80 percent of them were aimed at some kind of service to the common weal, even if they provided a salary or a stipend. Very little of it was about just getting a new job, earning money, or starting a different career.”

This mismatch between the official definition and the working understanding of the program frequently led to confusion on the Atlantic Board and among participants in the field, who were following a variety of missions and struggling to come together around common principles. The question “What is the main goal?” would have elicited several different answers from different observers throughout the life of the initiative, and to some extent still does. In the course of the interviews for this report, all of these answers came to the fore at one point or another: overturning negative stereotypes of older age, harnessing older people’s talents in the service of community needs, combating ageism in the labor market, helping older people achieve fulfilling lives, and filling human-resource gaps in the nonprofit sector. Those are all compatible goals; many of them are complementary, some are even interdependent. But all of them are different. And not all of them could share top priority without making the strategy untenably top-heavy. In any case, most people tended to agree with Professor Hinterlong, who wrote in 2011 that the haziness about terms, definitions, and boundaries “complicates the identification of best practices and makes it almost impossible to adequately capture the breadth, scale, and impact of innovation underway nationally.”<sup>30</sup>

On the other hand, as Sabrina Reilly of the National Council on Aging points out, throughout most of the decade civic engagement for older adults was at best a conceptual umbrella under which many different ideas, experiments, and novel practices were starting to gather. “There was no central convening mechanism,” she says, “until Atlantic brought a bunch of us together at the Tarrytown meetings. And then, you’d sit at the table talking to another organization and find they were doing work similar to yours. But there was still very little common ground that you could define and draw a boundary around.” In an environment as fluid and embryonic as that, it could well have been too soon to expect a common language or set of priorities to solidify.

Without the benefit of long experience and hindsight, it would have been hard to specify, in the formative years of the initiative, what direction older people and their organizations might choose to take in enriching opportunities for life’s later years. An early report of the Atlantic-funded Community Experience Partnership expressly embraced “a spirit of experimentation and possibility” and “deliberate flexibility in the hope of creating community-specific solutions.” Throughout the foundation world, initiatives have often foundered on strategies that were too prescriptive and

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<sup>30</sup> *Ibid.*

rigid in their early stages, and therefore failed to take advantage of opportunities and lessons that surfaced later. Most people agreed that Atlantic's approach to civic engagement avoided that straitjacket, and was therefore freer to respond to emerging ideas and leadership from the field.

**2. The Atlantic initiative scored many important, and in some cases remarkable, accomplishments. Responding to the most fundamental question normally applied to foundation initiatives — did it achieve most or all of the goals set for it in this period of time — all of those interviewed said Yes.**

As early as 2007, just five years after the start of the civic engagement initiative, Jim Hinterlong was able to conclude in his first evaluation report that “Atlantic Philanthropies, in partnership with its grantees and their stakeholders, has contributed to significant advances in the accessibility, breadth, and quality of opportunities and supports available to older adults throughout the United States.” He follows with a long list of concrete accomplishments, including:

- inserting civic engagement provisions into the Older Americans Act;
- spotlighting it at the 2005 White House Conference on Aging;
- increasing support for older adults in state governments;
- expanding transportation options for older adults in ten places;
- expanding Experience Corps to 20 cities and more than 2,000 adults;
- solidifying and expanding the Purpose Prize;
- identifying and supporting model programs in volunteering, employment, and lifelong learning;
- launching a new Public TV series and a widely viewed documentary on aging;
- sponsoring “rigorous research” that “reveals engaging older adults yields positive outcomes” and that “show[s] extended employment for older adults is feasible”;
- influencing private-sector policies toward older workers;
- helping 30 community foundations create or expand aging programs;
- leading six Regional Associations of Grantmakers to create or strengthen aging programs; and
- enlisting “numerous philanthropic partners” to join Atlantic-funded projects.<sup>31</sup>

Professor Hinterlong is necessarily cautious about attributing all of these achievements to Atlantic. As he points out, success tends to have many parents, and while everything on this list benefited from substantial investment, and in many cases assertive leadership, by Atlantic, it is next to impossible to specify what portion of it would not have happened but for the Foundation's involvement.

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<sup>31</sup> Hinterlong 2008, p. 5 (bullet items are paraphrased for brevity, except for phrases in quotation marks).

Less scholarly observers, however, seem to harbor no doubt on the matter. One former grantee — who no longer works directly in the field, does not seek or receive support from foundations, and thus can claim more than average objectivity — described the Foundation’s influence this way: “Virtually everything that’s been accomplished is attributable, at least in part, to Atlantic. They observed, inhabited, and advanced a really important idea. And each of those steps is a difficult, risky, thing to do — adventurous and worthy of praise. To see it, believe in it, act on it, all that is really, really spectacular. And having such high fidelity to a big idea, the willingness to put tens of millions of dollars on that idea, and then become thought partners and genuine leaders in the idea — that’s great, great stuff. And very little of what’s been accomplished would ever have been accomplished without Atlantic.”

Another commenter (still a current grantee) acknowledges some mixed feelings among colleagues in the field, and yet comes to essentially the same conclusion: “Look, of course many of us are unhappy that it ended early, and some people unquestionably feel abandoned or discouraged, and all that commentary is legitimate. But it would be very hard to make an argument that what Atlantic did in these eight or nine years was ineffective or not important or won’t make any difference. You can argue — and believe me, we do argue — about how important, and how much difference, and so on. But significant? There really isn’t any question. Truly significant.”

**3. The core ideas of the civic engagement agenda — the untapped potential of the Third Age, the appeal of encore careers, the coming demand for such careers from a burgeoning older population, and the need for older people’s skills in meeting social needs — have withstood the test of time and have plainly gained traction, if not yet dominance.**

Several people who are in a position to observe the field broadly — who interact with many funders, practitioners, policymakers, or combinations of the three — agreed that the past decade has seen a marked change in the way key ideas of Atlantic’s program have been absorbed into routine debate and analysis of issues related to older adults. At the federal, state, and community levels, discussions about older Americans are now at least as likely to focus on what older people can do, and the resources they can bring to the marketplace and to civil society, than to the services and supports they will need. “At the level of rhetoric, at least, the change has been noticeable,” says one close observer of national policy. “That doesn’t always mean that actual behavior is different, or that major programs are now reoriented, or whatever. But the way people talk about this age cohort is different. And in policy circles especially, language matters.”

Another grantee adds that “ageism, like any widely held prejudice, isn’t going to change in a decade, and ageism is still reflected in people’s view of social policy and human services. But that’s hardly surprising. What’s surprising is that there is also this other line of thought — sometimes it’s lip service, and sometimes it’s just abstract blather, but it’s there. Older people are going to be a much bigger part of

our world in the next couple of decades, and they're not going to be just lying in bed or playing shuffleboard, so the need for this new way of thinking is going to be more and more obvious. We'll need to think about what older adults would like to be doing, what they can be doing, and what we need for them to help get done. That's already happening, and it's something to build on. Of course it's not all because of Atlantic or any other single influence. But it's moving in the direction that all of us have been pushing, and that says a lot."

Summarizing his earlier research in the field and the opinions of experts inside and outside the civic-engagement movement, Jim Hinterlong reached a similar conclusion:

While the public and private sectors largely remain focused on addressing the basic economic and health needs of older adults, there is growing acknowledgement that engaging older adults in civic activity is a winning proposition for individuals and communities. A national network of advocates and innovators has emerged. The largest non-profit organizations and professional associations in the field of aging have embraced and advanced civic engagement. In part catalyzed by changes in public policy, the aging network has enacted civic engagement as a goal. The philanthropic community has invested in testing and promulgating promising ideas for mobilizing and supporting older individuals in volunteering, employment, public service, and lifelong learning. National service programs have prioritized involvement of older adults. New organizations have emerged and established leaders from other sectors entered to bridge areas of work within this nascent field. And a community of scholars has arisen to document trends, develop strategies, and assess evidence related to civic engagement among older adults.<sup>32</sup>

#### **4. Nonetheless, national leadership to continue this progress remains slim, and there is no clear source of new leadership on the horizon.**

In the report just quoted, Professor Hinterlong goes on to cite a long list of promising developments and centers of influence — "a cohort of leaders" — that have driven progress in the field thus far. He singles out for particular mention Civic Ventures (and the Purpose Prize in particular), NCOA's Respect*Ability* initiative, the Gerontological Society, and the 2005 White House Conference on Aging.<sup>33</sup> All of these — along with Grantmakers in Aging, Age4Action, and the community foundations participating in the Community Experience Partnership — have fortified their leadership with substantial support from Atlantic. With that support ended or ending soon, it is an open question whether any of these organizations can continue exerting their influence and amplifying their ideas beyond the current level.

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<sup>32</sup> Hinterlong 2011, p. 3

<sup>33</sup> *Ibid.*, p. 15.

Professor Hinterlong continues: “Current institutions — everything from the private and public sector labor markets, education, the non-profit sector, even religious organizations — require assistance in recalibrating their strategies for serving and engaging the capacities of an increasingly large and diverse older population. Change on this scale will require ongoing investment.” With Atlantic’s departure and diminished contributions by several other funders in this area, the prospects for ongoing investment are uncertain at best.

“The failure of Age4Action to get any significant support to continue building this field was just tremendously dispiriting for many of us,” one network member said. “It’s not just that we now have to figure out how to limp along without funding, which most of us are committed to doing. It’s that no one out there thought this was important enough to establish one little center of leadership to carry forward. We weren’t talking about building some giant thing, reinventing AARP or anything. This was small potatoes, financially speaking. And yet no one was interested. I find that just depressing.”

Not all the news is bleak, to be sure. In late 2011 the American Association of Community Colleges received a \$3.2 million three-year grant from the Deerbrook Charitable Trust. Combined with an earlier grant from the Lumina Foundation, the new support will allow the Association not only to continue the Plus-50 initiative that was launched with Atlantic support, but to reach more colleges and add another 10,000 enrollees. Still, that remains a rare funding success in a field that is otherwise devoting much of its energy to managing shrinkage.

The most powerful leadership voice in the field has been that of Civic Ventures, which is likely to remain a force even after Atlantic’s terminal grant runs out in 2014. Yet with close to two-third of its support having come from Atlantic over the past several years, it seems probable that the pace and scale of Civic Ventures’ accomplishments, at least for a few years, will be diminished. “We’re not going to be able to replace all that Atlantic money,” Marc Freedman acknowledges, but thanks to the 2010 tie-off grant, “we’re going to be able to make this transition in a way that doesn’t involve draconian changes in the organization.”

The stronger and more optimistic grantees interviewed for this report offered a similar forecast for their work: a transition to more modest but still committed activity. Others, less optimistic, predicted a temporary halt in the field’s progress, until a stronger economy and the inexorable growth of the older population bring renewed interest from philanthropy and public policymakers. “This won’t go away entirely,” one less-optimistic observer predicted, “because older people aren’t going away, and they will eventually make their voices heard, probably. But right now, I think we’re in a dead spot for a while. Or at least that’s how it feels at the moment.”

Nor does the overall political climate promise much support from government. “If you just look at the list of [federal] initiatives, the Kennedy Serve Act and the stuff under the Older Americans Act and the Administration on Aging and AmeriCorps

and all that,” one veteran of the field said, “it all sounds impressive. But let’s face it: this is all *discretionary domestic spending*. It’s like a turkey farm at Thanksgiving; the life expectancy isn’t good. And who’s going to be out there clamoring for whatever might be salvageable? Right now, I don’t see a lot of strength there, frankly.”

**5. Ending a successful initiative, or making severe changes in its strategy, normally calls for advance planning, careful communication, and a gradual period of transition. Atlantic’s decision to pivot away from civic engagement in just 12 months, without a transition plan, has likely reduced the chances for continued progress in the field.**

Observers of philanthropy sometimes complain that foundations are too slow to abandon unsuccessful activity, and that the best course of action when a program is failing is often just to end it, rather than to continue spending money with diminishing hopes of success. But the decision to exit from the civic engagement field was, by all accounts, not the result of any determination that the initiative had been unsuccessful or unproductive. It was, rather, the result of a change in internal priorities at the Foundation and a desire to shift resources toward other aspects of the aging agenda — particularly enhancing the economic and health security of older Americans and strengthening their voice in public policy. Yet the initiative’s termination was, by the standards of most large foundations, unusually abrupt and absolute. Several observers, both grantees and outsiders, believe that the sudden departure contributed to a sense that the field was in decline — “played out,” as one person put it — and thus not a promising opportunity for other funders.

A person closely involved in the initiative over most of its lifetime noted that other funders had been following Atlantic’s lead for several years, and some of them may have likewise taken a cue when the Foundation headed for the exits: “Some foundations that started understanding the potential ... were starting to come to Grantmakers in Aging, and started doing work in their communities. They were really dependent on Atlantic’s R&D to get their work going. Their program officers could go back and tell their boards that this was legitimate work, because this big international foundation was doing it and was kind of an exemplar. But they now have neither of that anymore: neither the substantive guidance nor the credibility. In fact, I wonder if there’s actually a harmful message now: this international foundation is now backing away from this work.”

It is important to note that Atlantic is operating for only a limited time and will be ending *all* its programs, regardless of their merits, by the end of this decade. So the idea that some initiatives would end sooner than others is hardly surprising. The choice to bring the civic engagement initiative to a close was, in most observers’ judgment, neither irresponsible nor necessarily disturbing. The prevailing concern is mostly over the swift timing of the move, the relative scarcity of advance communication, and the lack of any plan for how the field would continue or adapt.



Programs develop forward momentum as they operate. If they are to be brought to a stop — especially if that stop is earlier than planned, but even if it isn't — the momentum needs to be slowed and the engine needs to be steered toward a realistic destination. Terms of conclusion — timelines, expectations about current and future roles, funding projections, anticipated shrinkages or reorganization of activities, matching of resources to planned work as the ending nears — all need to be spelled out precisely, and then communicated consistently and repeatedly to implementers, other funders, and staff. Even if a program ends ahead of schedule, it is presumably desirable — and certainly possible — to end it in a way that still achieves some of the goals for which the program was set in motion. But accomplishing that, while also disappointing people's expectations, upending their work plans, and altering their budget forecasts, is a complicated managerial and diplomatic challenge. To make an ending productive, it needs *more* clarity and oversight than when operations are routine and ongoing, not less.

The record of Atlantic's grants in civic engagement is strong and positive, in the view of both the formal evaluation and informal observers. That record is not blemished by the way the program ended. But it is reasonable to ask whether the initiative's legacy might ultimately have been even greater, and its effects more durable, if it had been concluded in a more deliberate and orderly way, with a clearer message to other funders and practitioners about what Atlantic had learned from its ten years and more than \$120 million investment in the field.

**6. The post-2008 economy raises particular challenges for civic engagement. These were unforeseeable at the time the initiative's strategy was first designed, but they may well call for a fundamentally new approach by those who lead the field in the next several years.**

A earlier quotation pointed out the dim future for domestic spending programs, and thus for continued government support for community-service and education programs of the kind Atlantic has promoted for older Americans. But the difficulties for civic engagement in the next several years go beyond the poor prospects for major public funding. The shrinking job market has hit the "young older" population — people between 50 and 65 — especially hard, both with gravely reduced odds of finding work after losing a job and with diminished assets for retirement. The result has been a rise in poverty, and an even steeper spike in near-poverty, among older Americans. The mounting hardship may make it harder for older people to devote time to activities beyond earning an income and paying bills.

None of this necessarily means that civic engagement will be less important to older adults, or even to low-income older adults, than it was before. They will still feel, in Sara Lawrence-Lightfoot's words, "the desire to 'give forward,' to be useful, to make an imprint." If that desire now finds itself side-by-side with a need to continue working for income, there is nothing incompatible about the two sets of goals. Both still depend on continued progress against ageism, whether in the workplace or in civic life, and both require a social attitude toward old age that places a greater



value on experience and accumulated wisdom. The point is not that a weaker economy undermines the principles of civic engagement, only that it may shift the emphasis, demand a different mix of opportunities, and call for continued innovation, experimentation, and leadership to meet the needs of an enormous generation that will not be content merely with “active leisure” when it reaches its Third Age.