

Date: January 22, 2020  
To: Members of the Massachusetts Councils on Aging  
From: Director of Member Services  
Re: Request for Applications to Host a Discovery Center Pilot Program in Partnership with Empower Success Corps from March 1, 2020 thru June 30, 2021

---

MCOA seeks applications from COAs who want to participate as pilot site hosts for the Discovery Center, a place where older adults can receive coaching from "Transition Navigators" to decide how to give back to their community through volunteer service in nonprofits and/or municipalities.

The pilots will be conducted for 16 months (March 2020 thru June 2021). Empower Success Corps Fellows will partner with the host sites in the delivery of the service. Two volunteers from your community (whom you recruit) will be trained by ESC Fellows to serve as the central staff known as "Transition Navigators". The TNs will learn how to coach individuals through a self-discovery process. While they are not coaching, they will work to find service opportunities in your town and area with nonprofits as well as municipal and civic organizations and build up a directory of service jobs to aid others in finding less common service jobs. Also, Boston College School of Social Work will lend support to evaluate the experience of the Transition Navigators and COA host site staff as well as participants who benefit from the pilot services.

**Applications are due by 3 PM Friday February 21, 2020. See the application instructions below for the questions and how to submit an application.**

**Background:** All of us need help during life's major transitions. One of the biggest transitions is leaving paid employment and the social connections and sense of purpose it provides. In FY19, MCOA began working with Empower Success Corps (ESC) to pilot new "Discovery Centers" staffed with volunteer "Transition Navigators" in 4 pilot sites. Discovery Centers employ transition coaches named Transition Navigators who help adults transition from full time employment to a new "community service" phase in their lives. They guide older adults through a journey of reflection about what their interests and values are, what service jobs need their talents, and how to go about being considered for these service opportunities.

In 2014, the American Society on Aging published an article about the emerging Encore Movement. In relevant part, the article explained why the talents of older adults are sorely needed to create age-friendly communities and address the challenges our communities face:

*In 2006, the **World Health Organization (WHO)** highlighted the unmet needs of older adults in cities and communities across the world. WHO noted in 2007 that for the first time, the majority of the world's population lived in cities. At the same time, the residents of these cities were growing older, yet their communities weren't prepared to meet their needs. To help raise awareness and encourage innovation, WHO launched an initiative to foster the exchange of experiences and*

*mutual learning about aging populations between cities and communities across the globe (WHO, 2007).*

*WHO outlined these eight topic areas to assess a **city's age-friendliness**: outdoor spaces and buildings; transportation; housing; social participation; respect and social inclusion; **civic participation and employment**; communication and information; and community support and health services.*

***To date, the major work occurring in those cities has largely ignored civic participation and employment. In the United States, people ages 65 and older make up one in seven Americans (U.S. Census Bureau, 2012), and that number only stands to grow. This large population of healthy, active baby boomers and older adults needs to be engaged to create safe, livable, and welcoming cities for other older adults and future generations.***

*What is more, beyond just including baby boomers and older adults (who make up nearly 15 percent of our population), **we need to issue an urgent call to them to offer their talents, skills, and experiences to solve some of our largest problems**—access to quality education, healthcare, and well-paying jobs, to name just a few.*

**Background on Empower Success Corps and ESC Discovery:** The Discovery Center Pilot Program manager is ESC Discovery, itself a Program of Empower Success Corps (ESC). For over 35 years, ESC has worked with experienced professionals seeking to make a difference and give back. Through high quality strategic planning, coaching, and professional services, ESC has made a lasting improvement in the nonprofit community and their capacity to deliver on their missions. ESC Discovery offers ideas, resources, and a peer support system to help people seek a stronger sense of purpose in their work, engage in their communities, and create balance in their lives. ESC programs address the issues that are unique to the “Encore Stage” of life – helping people shift their thinking about what is possible in the second half of life in order to apply their time and talent to meet social needs locally in their communities or globally wherever the need may be.

**Seeking Pilot Sites:** Now, we want to recruit between 8-10 new sites for the next round of the pilot to implement improved protocols having to do with how we build support for the service within a community and coach individuals with new methods. Host sites will receive a wide array of technical support from ESC so they can provide this unique service in their towns. Adults who meet with the Transition Navigators will have access to thought-provoking life transition seminars, personal 1:1 coaching and support from a skillful transition navigator, and access to comprehensive directories of confirmed local and regional volunteer job opportunities. ESC Discovery seminars include *Discover Your Encore*, *Discover Your Purpose*, *Discover the New Retirement*, and *Thinking Beyond the Money*. The program inventory of nonprofit jobs and public commissions and boards will expedite finding jobs that match a retiree’s interests and talents. You will be able to boost the civic engagement levels of adults in your town, for the benefit of the older adults, the organizations in your community, and the people they serve.

**Program Mission:** We anticipate the program seminars, local publicity, and the creation of robust local service job inventories will combine to build a much greater public awareness of how important it is to sustain purposeful roles in civic life after we leave our career jobs. We are excited about the impact this program might have in changing the way adults in MA think about what to do in this “encore” or “third phase” time of life. Words have power; more and more people are replacing the phrase ‘my retirement’ with ‘my encore job’. Also, MA is on its way to becoming an Age Friendly State – we believe this model

of service will be an effective means for Councils on Aging to facilitate civic engagement by and for older adults.

**Program Funding:** The program is funded by a grant of \$10,000 per year for 2 years from the Caleb Loring, Jr. Foundation to Empower Success Corp that supports the development of Discovery Centers in Essex County and a MCOA Service Incentive Grant of \$25,000 to ESC. In addition, in kind support is provided through a partnership with the United Way of Massachusetts Bay and Merrimack Valley; they have built and are about to release on line directory of volunteer service openings that will help adults find volunteer engagements with nonprofits. The database already contains jobs in over 400 greater Boston organizations. Due to terms of funding from the Caleb Loring, Jr. Foundation, applicants from Essex County are particularly encouraged to apply.

In addition, the pilot volunteer Transition Navigators will provide in kind support through their volunteer efforts and host sites of the pilot will provide valuable meeting space for 1:1 counseling and small educational group seminars.

If the pilot shows that adults are interested in this type of support AND volunteers can be successful in rendering the service, then ESC may seek to sustain this program. At this point in time, we cannot guarantee that the pilot services will continue after June 30, 2021.

**MCOA Grant Process:** All applications will be reviewed and pilot sites selected by MCOA and ESC. The site selection process is an open competitive process. Pilot site designation will be made and sites notified via email. Site selection notices made will be sent out by Friday March 6, 2020 and projects can begin any time thereafter. The pilot period and funding from MCOA will end on June 30, 2021, pending available funding under the FY2020 and 2021 Service Incentive Grants from Elder Affairs and other funding to support ESC Fellows.

**RFA Timeline:** Key dates for this process include the following:

1. MCOA releases RFA	January 22, 2020
2. COAs submit Applications	Friday February 21, 2020 by 3 PM
3. MCOA and ESC select sites and send Designation Notices via email	Friday March 6, 2020
4. ESC and MCOA convene first in series of monthly conference calls with Pilot Coordinator of sites for coordinating the timely recruitment of Transition Navigators, the convening of local stakeholders planning meeting, and other pilot activities.	Thursday March 19, 2020 at 1 PM
5. COAs convene a local stakeholders planning meeting to discuss the pilot mission and ask for advice and support in getting the word out about the service (word of mouth as well as formal media both being vital for creating awareness of and use of the Discovery Center tools and	By April 23, 2020

services)	
6. COAs complete recruitment of Transition Navigators	By April 29, 2020
7. ESC completes initial training of Transition Navigators	June 11, 2020
8. Create initial list of local service opportunities in host communities and local region – first ‘task’ for Transition Navigators while site training and publicity plan is implemented. ESC staff will guide and support sites in how to create this initial list.	Initial list should be ready for use on or before June 30, 2020
9. Publicity announcing the new Discovery Centers and inviting participation is developed and issued. MCOA will develop templates; local sites will modify and distribute to local news media via social media networks.	Publicity templates will be given to sites with award and at subsequently for other key events required of pilot sites.
10. Kickoff events held at each pilot site.	Dates TBD
11. ESC provides support to COA pilot sites and Transition Navigators	On-going through pilot period
12. ESC and BC School of Social Work conduct periodic evaluations of Program to include COA Staff, TNs and satisfaction studies of placements at nonprofits, municipal and civic organizations	Quarterly - dates TBD.

**Responsibilities of Parties:**

**MCOA responsibilities** include:

1. Funding ESC fellows who lead and coordinate pilot activities
2. Preparing publicity templates for local adaptation and use. MCOA will provide Press Release templates to all pilot sites to use for specific milestones and stories, including but not limited to these 8 events:
  - a. COA selection for participation in Discovery Center Pilot
  - b. Local Kickoff event once TNs are ready to coach
  - c. Seminars as they are scheduled with ESC staff
  - d. Announcing that adults may watch Discovery Center seminars on demand at the COA
  - e. General “Come find your Encore / new civic role” by visiting with Discovery Center counselors
  - f. Feature many local organizations seeking volunteers / e.g. with job openings.
  - g. Profile the TNs and reference the civic engagement Encore movement and its links to personal health and wellbeing
  - h. Create a profile of newly placed volunteers
3. Ensuring pilot activities are tracked and evaluated
4. Pursue modifications to pilot as lessons are learned or circumstances dictate
5. Sharing lessons learned with full MCOA membership, Elder Affairs, AARP and other interested

parties and stakeholders.

**ESC responsibilities** include:

1. ESC Fellows are pilot managers who will advise and support local COA staff
2. Train Transition Navigators
3. Provide professional poster to each site as well as program flyer for copying by sites.
4. Provide toolkits for coaching individuals
5. Conduct *ESC Discovery* seminars in person
6. Provide access to on demand videotaped seminars, as well
7. Facilitate entries into online directory of volunteer job openings
8. Participate in local meetings with stakeholders that seek to build community support for encore movement in their community.
9. Track performance of pilots; report on outcomes to MCOA and other funders

**Pilot Host Sites responsibilities** include:

1. Inviting stakeholders to meeting to discuss pilot goals and ask for their help in making it a success.
2. Recruiting 2 Transition Navigators who will each work 2 hours per week.
3. Set aside two 2-hour segments per week for TNs to host 'office hours' and/or to convene small group seminars.
4. Conduct CORI Checks of all prospective TNs
5. Train TNs in senior center rules, including office procedures, email usage, and how to use copiers, etc.
6. Participate in monthly pilot coordination conference calls with ESC and the other COA pilot coordinators to swap ideas and share experiences.
7. Feature live ESC Discovery Seminars at least 2 times per year; in addition, advertise and provide access to Discovery Center webinars for small groups guided with guided conversation by the TNs at your center. ESC will train TNs in the skills to use video and lead group sessions.
8. Center staff must report to ESC each month on the level of participant engagement (older adults who attend group sessions or 1:1 coaching sessions) and local publicity efforts.
9. If possible, secure senior tax work off financing for your 2 TNs, if they are eligible for it and interested in benefitting by it.

**Each COA host site must be assertive in advertising the Discovery Center services in many media beyond newsletter and in-center bulletin boards.**

10. Distribute press releases (to be provided by MCOA and modified by you) to your local media organizations as directed by ESC and master pilot publicity plan. See list of newsworthy events above under "MCOA's responsibilities".
11. Feature the program prominently in all social media accounts of the COA.
12. Display pilot posters and flyers prominently in your center as well as library, town hall, and other public venues in your town AND in neighboring towns.
13. Share copies of local publicity and published articles with ESC.
14. Make certain COA sends flyers to many types of referral resources such as career centers, job seeker networking groups, newcomer clubs, religious congregations and that Centers refresh

your contacts on a quarterly basis during the pilot period to boost awareness and referrals to this unique service.

**Transition Navigators** responsibilities:

1. Transition Navigators must be able to work 2 hours per week.
2. Transition Navigators must be able to use a computer with internet access during their work hours to show seminars and to complete on-line reporting of activity with Discovery Center Participants.
3. Transition Navigators must be computer literate and able to search the internet for information about organizations and service jobs.
4. Identify city or town boards and committees with vacancies so they can be included in service job listings along with service jobs with nonprofits.

For the ***Transition Navigators Job Descriptions***, see below:

**Discovery Centers for Civic Engagement**

**Transition Navigator® Volunteer - #1**

**Position Description**

---

**Overview**

The role of Transition Navigator is an important component of Discovery Centers. The Discovery Centers are designed to reach people, aged 55 and older, to help them to find a stronger purpose in their work, engagement in their communities and balance in their lives. With Councils on Aging Senior Centers as conveners, Transition Navigators are in-house trained guides serving as peer coaches to people who wish to engage with nonprofit organizations, governmental agencies and others, and who aim to use their skills and experience in social purpose work, thereby reaping the healthy aging benefits of living purposeful active lives.

Discovery Centers are staffed by Transition Navigators, supervised locally by Council on Aging managers, and supported by Empower Success Corps (ESC), which has been working with nonprofits for over 35 years to help them build capacity and create impact in their communities. ESC Discovery is a program of ESC that is focused on providing ideas, resources and a community of peers to help individuals, midlife and beyond, find their next fulfilling life opportunity, navigate life transitions, and think holistically about their futures. Supported by a strategic partnership with the Massachusetts Councils on Aging, the Discovery Centers for Civic Engagement aim to support healthy aging needs of older adults who continue to contribute to the social, economic and civic fabric of their communities. Other partners in the Discovery Centers include the Boston College Center on Aging & Work and Encore Boston Network.

**Position Description:** A Discovery Center Transition Navigator serves as a peer coach, using his or her experience gained through purposeful life activities, plus skills learned in formal training, to apply their passion for helping people in determining their own paths, developing goals and eliminating barriers to attainment of more meaning, engagement and balance in their lives.

## **Transition Navigator #1 Roles and Responsibilities:**

- Attend Transition Navigator Orientation training sessions
- Schedule regular “office hours” to serve the needs of Mentees in their respective Councils on Aging; average weekly time commitment: from two to four hours
- Attend ESC Discovery Seminars held in Council on Aging Senior Centers to meet and engage with Seminar attendees.
- Assist in Seminar marketing to attract Seminar attendees to attend Discovery Seminars
- Collaborate with adults to establish/assess goals, develop strategies, address obstacles, discover civic engagement opportunities, and document action plans
- Discuss their progress and help adults who visit the Discovery Centers to adjust strategies as needed
- Document Transition Navigator interactions by completing the online Transition Navigator Progress Report and completing other reports as required.
- Build up the Discovery Toolkit database with local service opportunities, including the addition of Civic Engagement Partners that would benefit from having volunteers.
- Attend periodic Transition Navigator continuing education programs.
- Coordinate activities with respective Council on Aging Executive Directors and/or Program Managers in their Senior Centers.
- Provide program improvement recommendations

## **Transition Navigator Strengths/Characteristics:**

- · Effective listener, empathetic; a strong desire to support people in transition
- · Critical thinker
- · Self-confident, patient, maintains focus
- · Enthusiastic, energetic, outgoing
- · Motivator
- · Coach / counselor; gives appropriate feedback
- · Friendly, supportive and positive, yet realistic, honest and professional
- · Able to help adults to feel connected to a community of peers
- · Establishes ground rules and obtains consensus agreement
- · Ability to manage difficult situations and behaviors

## **Background:**

- Educational:
  - Bachelor’s degree, not required
  - May have advanced studies in marketing, education, business, psychology, human resources, organizational development, or related fields
  - May have certifications in project management, work-life management or other adult counseling disciplines
- Professional:
  - Transition Navigators may have experience in marketing or public relations, leadership, life coaching, or business/nonprofit work experience in human resources, social service

agencies, business administration, organizational management, training and human capital development, change management, or psychology.

- Experiential:
  - Interest and experience in the fields of positive aging and the Encore Movement
  - On-going involvement in work (as a volunteer or for pay) with a social purpose



## Discovery Centers for Civic Engagement

### Transition Navigator® Volunteer #2 – Marketing and Public Relations (PR)

#### Position Description

---

##### Overview

The role of the Marketing and Public Relations Transition Navigator is critical to the success of the Discovery Center for Civic Engagement. The Discovery Centers are designed to reach people, aged 55 and older, to help them to find a stronger purpose in their work, engagement in their communities and balance in their lives. With Councils on Aging Senior Centers as conveners, Lead Transition Navigators are in-house trained marketeers, coalition builders, public relations voices and guides serving people who wish to engage with nonprofit organizations, governmental agencies and others, and who aim to use their skills and experience in social purpose work, thereby reaping the healthy aging benefits of living purposeful active lives.

The Marketing and Public Relations Transition Navigator possesses a broad skill set including the ability and willingness to identify volunteer opportunities and to support the Senior Center staff in adapting the model to the local environment. This role is supervised locally by Council on Aging managers, and supported by Empower Success Corps (ESC), which has been working with nonprofits for over 35 years to help them build capacity and create impact in their communities.

##### Position Description

A Discovery Center Marketing and PR Transition Navigator will work in a variety of ways:

- Lead in the identification of local volunteer opportunities through online searching and by reaching out to targeted non-profits and local government
- Help the Center to establish the right approach to scheduling participants to meet with other TNs in the Discovery Center
- Identify alternative ways to meet with, work with and highlight the program and its participants:
  - Job/Volunteer Fairs
  - External meeting locations (local libraries, Meetups, local social service organizations)
- Support other Transition Navigators in scheduling, problem-solving
- Help to market ESC seminars and other Discovery Center events

##### Transition Navigator #2 Roles and Responsibilities:

- Attend Transition Navigator Orientation training sessions
- Attend cohort meetings with other Transition Navigators from local Center and other Discovery Centers
- Supports in the development of the COAs local volunteer organization database
- Reach out to local government and local non-profits to gather interest in partnering with the Discovery Center
- Identifies other organizations similar to the Discovery Center and forms partnerships
- Meet with other Center TNs and Center management regularly to provide updates, identify Center strengths and areas needing improvement
- Meet with ESC Transition Navigator Coordinator regularly

## **Skills and Competencies:**

- Good communication, interpersonal and organizational skills
- Good marketing and public relations skills
- Strong problem-solving skills
- Ability to lead and empower others
- Ability to form networks and coalitions across industries and age groups
- Sensitive to and aware of the life stage needs of people who are 55 and over and who are seeking engagement in volunteer or paid work with a social purpose
- Able to engage effectively with their peers in one-on-one sessions in person, by telephone or via email
- Good computer and internet skills, or willing to learn these skills

## **Transition Navigator Strengths/Characteristics:**

- Networking; forms alliances and builds strong partnerships
- Effective listener, empathetic; a strong desire to support people in transition
- Critical thinking, objectively analyzing information and situations
- Self-confident, patient, maintains focus
- Enthusiastic, energetic, outgoing
- Motivator, helping others to become enthusiastic about what they are doing
- Coach / counselor; gives appropriate feedback
- Friendly, supportive and positive, yet realistic, honest and professional
- Able to help adults to feel connected to a community of peers
- Establishes ground rules and obtains consensus agreement
- Ability to manage difficult situations and behaviors

## **Background:**

- Educational:
  - Bachelor's degree, not required
  - May have advanced studies in marketing, education, business, psychology, human resources, organizational development, or related fields
  - May have certifications in project management, work-life management or other adult counseling disciplines
- Professional:
  - Transition Navigators may have experience in marketing or public relations, leadership, life coaching, or business/nonprofit work experience in human resources, social service agencies, business administration, organizational management, training and human capital development, change management, or psychology.
- Experiential:
  - Interest and experience in the fields of positive aging and the Encore Movement
  - On-going involvement in work (as a volunteer or for pay) with a social purpose

---

## Request for Applications to Participate in the Discovery Center Pilot as a Host Site March 2020 through June 2021

---

### Application Instructions

To apply:

1. Prepare answers to the following questions in a Word document.
2. Save the document with this naming convention: ESC Discovery Center Pilot Application from \_\_\_\_\_ (insert your town's name).
3. Then upload the entire application document via the MCOA website at [www.mcoaonline.com/esc-rfp](http://www.mcoaonline.com/esc-rfp).

**Program Applications must be entered via the MCOA Website no later than close of business on Friday, February 21, 2020.**

Applications will be reviewed and grant awards announced by email to the primary contact of the applicant no later than March 6, 2020.

---

### Questions

---

1. Information about the Applicant

*COAs who apply must be members of MCOA and up to date on MCOA dues for FY20.*

- Applicant Organization's Name
- Mailing Address
- Applicant's Primary Contact by name, position title, and phone and email address.

2. Does your center have a staff person (apart from your director) who is responsible for volunteer recruitment and coordination within your center who would likely train and supervise the performance of the TNs? Yes or No

- a. If yes, list their name and hours of service.
- b. How many volunteers did this person supervise in your center during 2019?

3. The following preferences will rank your application higher; answer Yes or No.

- a. Geographic location.
- b. Are you one of the gateway cities in MA?
- c. Can you devote a senior tax work off slot for 1 or 2 of the two volunteer Transition Navigator jobs needed of your town?
- d. Do you already use Facebook or other social media to promote services at your center?
- e. This pilot would clearly strengthen any town's Age-Friendly movement -- Is your town active in becoming an Age Friendly town? Yes or No. If yes, tell us:
  - i. What stage is your town in on their Age-Friendly process – Research and Focus Groups stage, Planning stage, or implementation Stage?
  - ii. How is your center specifically involved in the Age-Friendly movement?

4. Who will organize and coordinate these activities for your COA?
  - a. Provide their name, email address and phone number.
  - b. Describe the organizer's experience in recruitment and managing volunteers and understanding of the "encore" movement.
  - c. Also, could they attend a monthly video conference call?
  
5. Within 5 weeks of being selected for the pilot, you will need to convene a group of adults from your community who can advise you on how to get the word out and also pledge to support getting the word out by publishing and / or sharing materials about the service in their social networks.
  - a. Make a list of whom you would invite to this meeting – the list should include the person's name as well as the name of their organizational affiliation (e.g. COA Board, synagogue, local service club, Veterans Agent, etc.)
  
6. The Pilot envisions having each TN work a 2-hour shift each week -- a TN will use 'office hours' to coach individuals, research organizations on line, cultivate information about service jobs in town and local area, update volunteer service directories, and/or convene small group seminars and other activities. Can you provide a quiet office space twice per week for 2 hours per session where they may converse confidentially and/or work via access to the internet to conduct research and/or make phone calls to organizations to find out more about service jobs? If yes, briefly describe the space you can commit.
  
7. Have you previously conducted educational events that focus upon volunteer service and its connection to better health and wellbeing? If so, explain what lessons you learned from that experience that will shape how you go about it now. (if your COA is selected as a Discovery Center Pilot).
  
8. Are there large cultural groups in your community that you might focus upon during this period? If so, identify which cultures your team might focus upon, what their primary language is, an estimated number of older adults from the group that reside in your town.
  
9. Do you have bilingual staff? If yes, which languages do they speak?
  
10. What additional information would you like us to know about you and your interest?

For programmatic questions, please contact ESC's Willia Cooper at 617-335-7569 or [wcooper@empowersuccesscorps.org](mailto:wcooper@empowersuccesscorps.org). General questions about the application process itself or your COA's eligibility may be directed to MCOA Lynn Wolf, at [lynn@mcoaonline.com](mailto:lynn@mcoaonline.com), or to Shari Cox at [shari@mcoaonline.com](mailto:shari@mcoaonline.com).