



GROUP

L e a r n i n g f o r A c t i o n

## Civic Ventures

### Evaluation of the Silicon Valley Encore Fellows Pilot

May, 2010

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## I. Introduction: What is the Silicon Valley Encore Fellows Pilot?

Founded in 1998, Civic Ventures is a think tank and program incubator helping society achieve the greatest return on experience. Through an inventive program portfolio, original research, strategic alliances, and the power of people's own life stories, Civic Ventures demonstrates the value of experience in solving serious social problems. In 2009, Civic Ventures launched the Silicon Valley Encore Fellows (SVEF) pilot: a program in which highly-skilled, executive-level fellows work for six to 12 months for a Silicon Valley nonprofit organization. The Encore Fellowships are paid, transitional positions where individuals bring significant skills and experience from their careers and apply them in social-purpose organizations, often leading to a sustained encore career. During the pilot year, ten former corporate employees were awarded fellowships.

The SVEF pilot was sponsored by The David and Lucile Packard Foundation (Packard Foundation) and the Hewlett Packard Company (HP) and the evaluation of the pilot was funded by the Packard Foundation.

### The Need for Encore Fellowships

Civic Ventures is on the leading edge of a cultural shift in which society increasingly views getting older not as a time of only retirement and leisure, but also as an opportunity to put life experiences to work to solve some of our toughest social problems. The baby boom generation (the 78 million Americans born between 1946 and 1964) is in better health, is better educated, and is living longer than any previous generation. This population represents a huge potential resource to address social challenges such as those facing education, the environment, and healthcare.

**The first baby boomers turning 60 are the same generation that John F. Kennedy famously challenged to ask themselves what they could do for their country. This same generation is now positioned to lead another social movement based on sharing life experience. They couldn't come along at a better time.<sup>1</sup>**

### Demand for Nonprofit Leaders

According to the National Center for Charitable Statistics, there were approximately 1.5 million nonprofit organizations registered in 2008; a 33% increase over 1998.<sup>2</sup> As corporations increase social responsibility, individuals increase charitable giving, and the demand for social services increases, the growth in the number of nonprofit organizations will likely accelerate. Yet one challenge that continues to vex nonprofits is the need for talented and skilled organizational leaders. According to a study of nonprofits with revenues greater than \$250,000 conducted by The Bridgespan Group, nonprofits will need 640,000 new senior managers by 2016; this is 2.4 times the number of senior managers currently in the nonprofit workforce.<sup>3</sup>

The effectiveness of nonprofits depends on the ability of the sector to replenish organizational leaders. However, nonprofits often have limited access to talent pools. A majority anticipates that it will be difficult to fill these managerial roles: six in 10 nonprofit employers are challenged to recruit skilled employees (according to the 2008 MetLife Foundation/Civic Ventures Survey of Nonprofit Employers).<sup>4</sup> Nonprofits recognize that they may be able to tap into talent pools from the for-profit sector in order to fill this personnel gap. In a 2009 study of nonprofits, also by The Bridgespan Group, 73% of respondents reported

<sup>1</sup> Civic Ventures.

<sup>2</sup> National Center for Charitable Statistics (2009). Number of Nonprofit Organizations in the United States, 1998 – 2008. Retrieved on March 10, 2010 from: <http://nccsdataweb.urban.org/PubApps/profile1.php?state=US>.

<sup>3</sup> The Bridgespan Group, Inc. (2009). Finding Leaders for America's Nonprofits. Retrieved on March 10, 2010 from: <http://www.bridgespan.org/finding-leaders-for-americas-nonprofits.aspx>.

<sup>4</sup> MetLife Foundation/Civic Ventures (2008). Survey of Nonprofit Employers. Retrieved on March 10, 2010 from: [http://www.civicventures.org/publications/surveys/employerssurvey08/employsurvey\\_execsumm.pdf](http://www.civicventures.org/publications/surveys/employerssurvey08/employsurvey_execsumm.pdf).

that they value private sector skills and anticipate that 50% to 75% of the job openings will require traditional business skills such as finance, general management, marketing/communications, planning, evaluation, operations, technology, and human resources.<sup>5</sup> Sixty-nine percent of nonprofits also recognize that late-career or previously retired workers (encore workers) have valuable experience that could benefit their organizations.<sup>6</sup> Clearly, there is a demand for and interest in encore workers and private sector skills within the nonprofit sector.

### **Encore Fellowships as a Way to Increase the Supply of Nonprofit Leaders**

The 2008 MetLife Foundation/Civic Ventures Encore Career Survey of over 3,500 adults between age 44 and 70 reveals that millions of Americans are interested in encore careers, which Civic Ventures defines as “a new stage of work for the greater good.”<sup>7</sup> According to the study, 5.3 to 8.4 million older adults have already transitioned from midlife careers into encore careers in fields such as education, healthcare, government, and for-profit businesses that serve a public good. Another 45% of the nation’s 78 million baby boomers are interested in pursuing encore careers. While those who are interested in encore careers primarily cite the desire to stay active, productive, challenged, and learning as motivators, a majority also recognize a need for continuing income and health benefits. However, this generation of Americans is not just looking for means to fulfill economic needs or personal interests. They are looking for ways to combine “income and personal meaning with social impact.” Nearly two-thirds (64%) of adults interested in encore careers are looking for ways to use their skills and experiences to help others.

While there is strong interest in moving into an encore career, many adults have reservations or are unsure of how to go about making this transition. For those who are thinking about retirement or who have retired already, flexibility in schedule is important. A majority of those interested in encore careers is concerned about being able to take time off (80%) and that they might not have time to do the things they need to do (71%). Other concerns include income, health benefits, difficulty finding the right job, and age discrimination.<sup>8</sup>

In an effort to connect adults looking for an encore career with nonprofits seeking experienced talent, Civic Ventures developed and launched the SVEF pilot: a program in which highly skilled fellows work part time for six to 12 months for a Silicon Valley nonprofit organization and earn a stipend. The work that fellows do is intended to be high-impact: building the capacity of the nonprofits in sustainable ways. Encore Fellows gain knowledge of and experience in the nonprofit sector and the program is intended to launch fellows into the next chapter of their careers in the social sector. The SVEF model is also intended to affect nonprofits’ hiring practices by showcasing the potential of individuals with corporate backgrounds to integrate into social purpose organizations, thus increasing the pool of potential nonprofit leaders. As Encore Fellowships become more common and as nonprofits change their hiring practices, those from the private sector interested in an encore career in the social sector will have a new option for making a successful transition.

### **Silicon Valley Encore Fellows Pilot Model**

SVEF is a Civic Ventures enterprise that continues the organization’s efforts toward creating a new category of work: encore careers. Through the 2009 SVEF pilot, Civic Ventures aimed to test an experiential pathway through which high-level corporate employees can transition into a social purpose encore career. The SVEF pilot also furthers Civic Ventures’ goal of broadening the cultural conceptions of retirement;

<sup>5</sup> The Bridgespan Group, Inc. (2009). Finding Leaders for America’s Nonprofits. Retrieved on March 10, 2010 from: <http://www.bridgespan.org/finding-leaders-for-americas-nonprofits.aspx>.

<sup>6</sup> MetLife Foundation/Civic Ventures (2008). Survey of Nonprofit Employers.

<sup>7</sup> MetLife Foundation/Civic Ventures (2008). Encore Career Survey. Retrieved on March 10, 2010 from: [http://www.civicventures.org/publications/surveys/encore\\_career\\_survey/Encore\\_Survey.pdf](http://www.civicventures.org/publications/surveys/encore_career_survey/Encore_Survey.pdf).

<sup>8</sup> Ibid.

adding the very idea of “encore career” to our common lexicon – a term possessing clear meaning and identity. Civic Ventures’ stated aim is to develop, highlight, and promote the myriad avenues through which millions of baby boomers will be working in encore careers by 2020.

### Components of the Model

The SVEF model was shaped through local field research, extensive interviews across the corporate and nonprofit sectors, an in-depth examination of two dozen fellowships and related programs happening across the country, and local knowledge of the nonprofit community in Silicon Valley. The 2009 SVEF pilot model comprises the following components:

- **High impact engagements** – Encore Fellows engaged in high-quality, high-impact nonprofit assignments that were intended to fulfill critical needs and build the capacity of nonprofits.
- **Meaningful durations** – Encore Fellowships last six months (full-time) to 12 months (part-time) with the goal of providing an ample duration of time so that fellows can become integrated into nonprofits and achieve meaningful impacts. Fellows and nonprofits decide on a schedule that suits both of their needs and interests.
- **Stipend** – Encore Fellows received a stipend of \$25,000 paid by corporate and philanthropic sponsors. The stipend reinforces the value of the work that fellows perform and facilitates commitment from both the fellow and nonprofit.
- **Selection and matching of fellows and nonprofits** – Civic Ventures selected fellows and nonprofits according to specific criteria designed to maximize the benefits of the experience for both parties. The fellowships target highly-skilled individuals who are exiting their midlife careers and looking to transition into the nonprofit sector. The program matches fellows’ professional skills with nonprofits looking for support. Encore Fellows gain knowledge of and experience in the nonprofit sector. The program is intended to launch fellows into the next chapter of their careers in the social sector.
- **Onboarding** – Civic Ventures provides guidance and support during the fellows’ onboarding period. Through this process, fellows and nonprofits work together to define the fellows’ projects for maximum leverage of fellows’ skills in the service of filling the nonprofits’ critical capacity needs.
- **Learning community** – Concurrent with nonprofit engagements, fellows and nonprofits participated in an ongoing learning community. This provided opportunities for Encore Fellows to interact with each other and share experiences and lessons learned. It also provided professional development activities and opportunities to deepen fellows’ knowledge and understanding of the nonprofit sector as well as outside expertise and resources to support them in transitioning into encore careers.
- **Intermediary** – In the pilot year, Civic Ventures served as the intermediary. With foundation partner support, Civic Ventures convened corporate sponsors, nonprofit sponsors, and qualified candidates for fellowships; facilitated the matches between Encore Fellows and nonprofits; provided ongoing support throughout the fellowships to fellows and nonprofits; organized regular convenings; and provided transitional support to fellows interested in pursuing encore careers.

Exhibit 1 below depicts the key phases a fellow moves through during an encore year.

**Exhibit 1**  
**Phases of the Silicon Valley Encore Fellows Pilot**



**Profile of Silicon Valley Encore Fellows and Nonprofits**

During the pilot year, ten Encore Fellows brought their considerable professional skills and experience to the SVEF pilot. Exhibit 2 below provides a brief snapshot of the fellows and their experiences prior to participation in the program.

**Exhibit 2**  
**Silicon Valley Encore Fellows Pilot**  
 Profile of Encore Fellows<sup>9</sup>  
 (n=10)

<b>Corporate Experience</b>	<b>Nonprofit Experience</b>	<b>Educational Experience</b>
9 people management	6 volunteer or community service experience	3 Business Administration
8 strategic planning	4 served on boards of directors for nonprofits	2 Psychology/Sociology
8 communications	2 worked with nonprofits as program evaluators	2 Engineering/Computer Science
7 marketing	1 served in the US Peace Corps	1 Marketing
7 research and evaluation		1 Education
5 project management		1 Microbiology
5 business development		1 Industrial Relations

<sup>9</sup>Please note, totals do not add up to 10 since fellows had experience in more than one category.

<sup>9</sup> Fellows' corporate experiences were collected in their individual statements of interest. Their nonprofit and educational experiences were drawn from their resumes. Educational experience refers to highest degree attained.

Encore Fellows worked at nine nonprofits. Exhibit 3 below lists the participating nonprofits and their organizational missions.

<b>Exhibit 3</b> <b>Silicon Valley Encore Fellows Pilot</b> Nonprofits (n=9)
<b>Aspiranet</b> is a California statewide network of family, adoption, foster care, after school, and education programs.
<b>Civic Ventures</b> is a think tank and program incubator helping society achieve the greatest return on experience.
<b>Citizen Schools</b> enhances the academic performance of low-income middle school students by recruiting adult volunteers to teach an 11-week after-school apprenticeship course, and to provide homework support and school navigation assistance.
<b>Community School of Music and Arts</b> enhances the quality of life in our region by engaging our diverse community in high-quality arts education, performances, and exhibitions.
<b>Environmental Volunteers</b> promotes understanding of, and responsibility for, the environment through hands-on science education.
<b>Partners in School Innovation</b> enables public schools in high-poverty Bay Area communities – serving students of color and English Learners – to achieve educational equity through school-based reform.
<b>Resource Area for Teaching</b> provides educators with the tools they need to engage their students in powerful hands-on learning experiences.
<b>Silicon Valley Education Foundation</b> invests in school innovation and readiness programs, and science, technology, engineering, math, and arts education in 34 Santa Clara County districts.
<b>Youth Community Service</b> empowers at-risk youth and their families to meet their goals for safety, stability, belonging, and success by providing a continuum of individualized services and advocacy.

## II. Evaluation Design

To conduct an evaluation of SVEF, Civic Ventures contracted with LFA Group<sup>10</sup> (LFA, *Learning for Action*), an independent research and evaluation firm, to conduct a retrospective assessment of the pilot year. This section of the report describes the LFA evaluation design, including the research questions, data collection methods, and analysis procedures used to evaluate SVEF.

### Evaluation Questions

Evaluators designed the evaluation of the SVEF pilot year to answer the following questions:

1. What components of the SVEF model lead to successful matches?
2. What impacts and benefits do nonprofits experience as a result of sponsoring an encore fellow?
3. What impacts and benefits do Encore Fellows experience as a result of participation?
4. How does participating in SVEF influence attitudes towards encore careers?
5. What aspects of the SVEF model are critical specifications?
6. To what extent is the SVEF model scalable?<sup>11</sup>
7. How satisfied are Encore Fellows and nonprofits with the SVEF experience?

### Evaluation Methods and Data Sources

Evaluators collected quantitative and qualitative information from key stakeholders involved in the development and implementation of the SVEF pilot. This evaluation report included the following evaluation methods:

#### Key Informant Interviews

Evaluators worked with Civic Ventures staff to identify stakeholders to participate in key informant interviews. The purpose of the interviews was to collect in-depth information about experiences with the SVEF pilot and to extract instructive lessons about the SVEF model, including how it contributes to the social sector and to the development of encore careers. In January and February 2010, evaluators conducted a total of 23 interviews with the following groups of stakeholders:

- **Encore Fellows** –Civic Ventures and the evaluation team selected six Encore Fellows that represented a diverse sample of personal experiences and nonprofit engagements.
- **Nonprofit Sponsors** – Executives at six sponsoring nonprofits participated in interviews. Nonprofits were selected to include a diverse sample based on types of organizations and types of encore fellow engagements. (Of the six nonprofits included, three had fellows who were also interviewed.)
- **Civic Ventures Staff** - Four Civic Ventures staff members and one board member involved in developing and implementing the SVEF pilot participated in interviews.
- **Corporate Sponsors** – Two representatives from the corporate sponsor of the SVEF pilot, the HP, as well as a representative from a corporation who declined participation in the pilot year, participated in the interviews.<sup>12</sup>
- **Philanthropic Sponsors** – Evaluators also spoke with three representatives from Packard Foundation, the foundation providing funding to support the SVEF pilot.

<sup>10</sup> Formerly LaFrance Associates, LLC.

<sup>11</sup> Findings related to scaling the SVEF model are included in a separate report to Civic Ventures titled “Considerations Regarding Scaling the Encore Fellows Program.”

<sup>12</sup> It should be noted that the corporation that opted not to sponsor fellows during the pilot year is sponsoring fellows during year two of SVEF.

All interview protocols are included in Appendices A through E.

### **Surveys**

In January 2010, evaluators administered an electronic survey to all ten Encore Fellows and nine nonprofit executives. All participating Encore Fellows and nonprofit executives completed the survey.

## **Evaluation Strengths and Limitations**

### **Strengths**

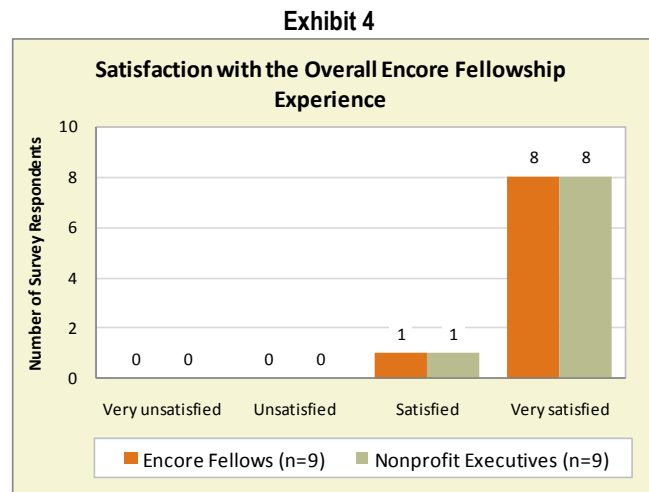
Using both key informant interviews and survey data allows for triangulation of results to strengthen or challenge findings. The fact that all Encore Fellows and nonprofits responded to the survey allows for reporting of results with confidence: no viewpoints were left out. Additionally, this evaluation lays the groundwork for further investigation of the conditions for success as the program is replicated.

### **Limitations**

The reader should keep in mind that the evaluation results reported here are not meant to be generalized to other fellows or nonprofits who may participate in the program in the future. This is for two reasons: (1) the pilot included a small number of fellows and nonprofits; and (2) the pilot took place in Silicon Valley, CA, which presents unique conditions and contextual factors that may not apply in other locations. This evaluation lays the groundwork for further investigation of the conditions for success as the program is replicated.

### III. Key Findings Related to the SVEF Model Effectiveness

Nonprofit leaders and fellows reported very high levels of satisfaction with their Encore Fellowship experiences (see Exhibit 4). Key informant interviews also revealed similar levels of satisfaction among the broad cross-section of stakeholders. What, specifically, led to this level of satisfaction? What are the elements of the SVEF model that resulted in successful, high-impact engagements? To answer these questions, the LFA evaluation team examined the components of the SVEF model, looking at how the model's design resulted in successful matches, onboarding, and high-quality engagements. This section of the report highlights these findings.



#### Selection and Matching Processes

Selection of nonprofits and fellows, and making individual matches between nonprofits and fellows, was an important component in the SVEF program. A great deal of care was put into selection and matching, and results indicate that the attention paid to these processes supported successful matches and engagements. Here we describe the selection and matching processes and discuss the ways in which they contributed to success. The findings suggest lessons regarding what works well (and what works less well) for selecting fellows and nonprofits, and for identifying good matches that lay the groundwork for high-impact engagements.

#### Identifying Nonprofit Organizations

With no existing model for the SVEF pilot that emphasized paid, high-level, high-impact work that could pave the way to an encore career, Civic Ventures cast a wide net to identify nonprofits that might be willing to experiment with the model. Initially the process identified approximately 75 environment- and education-focused nonprofit organizations within Silicon Valley.

To reduce the number of potential partner organizations, Civic Ventures established criteria. The parameters within which organizations needed to fit included:

- **Budget and Organizational Size:** The pool of organizations was filtered to include organizations that were large enough that a fellow becomes part of a team and has access to support throughout the fellowships. Organizations should also be small enough that a fellow would not get lost within an organization and lack access to the organization's leadership staff. The proxy that Civic Ventures used for organizational size is budget. In general, it was determined that organizations must have minimal annual budgets of roughly \$600,000. While Civic Ventures did not specify an upper threshold, the staff also relied on a sense that there was an upper threshold for organizational budget size that would indicate that an organization is too large for a fellow to have the type of impact the model was designed to achieve.
- **Leadership Stability:** Given that Civic Ventures conceptualized the fellowships model around the principle that fellows would impact organizations at the very highest levels, stability of organizational leadership was determined to be a necessary characteristic of potential nonprofit partners. Civic Ventures staff reviewed the tenure of executives at the potential organizations, and that of leadership staff overall, to assess stability.

- **Innovation and Flexibility:** To be successful, Civic Ventures also took into consideration the innovativeness of organizations and the expressed flexibility of nonprofit leaders to participate in the SVEF pilot.

Civic Ventures conducted its own research to determine the fit of organizations within these parameters, and, to gather additional input on the selection of nonprofit organizations, engaged funders and nonprofit leaders in conversations focused on the SVEF goals. When a group of approximately 25 nonprofits was identified as potential partners in the pilot, organizational leaders were invited to attend a meeting convened by the Packard Foundation. At this meeting, Civic Ventures presented the encore idea and invited feedback on the model from the nonprofit leaders in attendance.

In general, there was agreement among participants that the model was sound and ready for piloting. However, one significant point of view the nonprofit leaders offered at this meeting was that the fellowships last a duration of 12 months. Six months, in their opinion, is not long enough to gain traction in an organization and contribute to meaningful organizational change. The nonprofit leaders emphasized a need for a flexible time commitment that would suit the needs of nonprofits and fellows. Overall, this counsel was adhered to: of the ten fellow engagements, nine lasted one year (half-time) and one lasted six months (full-time).

After the meeting, these nonprofits were invited to submit a statement of interest in the SVEF program to Civic Ventures; and then a full proposal. Civic Ventures scored and ranked each nonprofit's proposal based on the project description, skill sets needed, and the likely impact a fellow could affect within an organization.

## Identifying Encore Fellows

When looking for a pool of executive-level, talented, potential fellows, Civic Ventures linked up with one of the large technology companies within Silicon Valley: HP. Civic Ventures and HP had an existing relationship, including HP's sponsorship of the Purpose Prize, another Civic Ventures program that provides awards to social innovators over 60 working in encore careers. A former HP employee, who later joined the board at Civic Ventures, helped to reinforce this relationship and deepen the connection between HP and Civic Ventures around the idea of Encore Fellowships. In many ways the company became a perfect partner in the SVEF pilot, and the relationship led to a tight identification process for fellows. HP's Vice President of Social Investment led the effort to identify potential fellows, with 15 to 20 years of experience in their career, among HP's former and current executives. Of the ten fellows in the pilot year, six came from HP. The four other fellows were identified as potential "encore-ists" by nonprofits invited into the pilot year. Civic Ventures' fortune was such, that nearly all encore applicants were accepted in the pilot year.

This is not to say that Civic Ventures did not have a process for vetting SVEF applicants. In fact, Civic Ventures had a rigorous process that was used during the pilot year. Applicants completed a statement of interest that included applicants' professional experiences, skill sets, community experiences, and interests. Civic Ventures staff relied on these information sources, particularly the skills sets, to score applicants and to select fellow candidates to invite for in-person interviews. At the interview, Civic Ventures gathered more information about the type of organization and work in which the fellow was most interested.

## Matching

During the matching process, nonprofits were asked to develop a detailed job description/scope of work for their prospective Encore Fellows. Civic Ventures gave these job descriptions to each accepted fellow. Fellows were asked to do their own research on these organizations and fellows chose two or three organizations in which they were most interested.

Interviews were then scheduled at fellows' top-choice organizations, with Civic Ventures participating in the majority of the interviews as a learning opportunity about the process as well as to facilitate the best possible transfer of information from nonprofit to fellow and vice versa. The nonprofits then offered a fellowship to a fellow. In most instances, fellows were matched with their top choice organization. For a couple of fellows, more than one nonprofit offered them a fellowship and it was up to the fellows to make the hard decisions about the organization at which they would spend their fellowship.

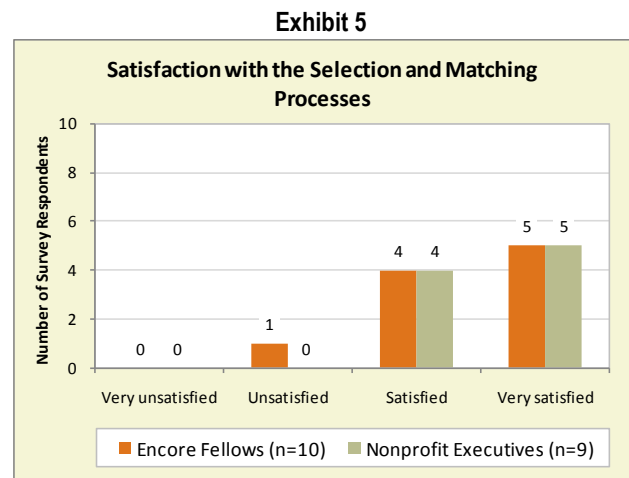
The matching process established by Civic Ventures was very intentionally developed as a "high-touch" model to create the best environment for a successful pilot year for all stakeholders. Civic Ventures staff relied on a blend of science and art throughout this matching process, developing an adept understanding of the personalities and cultures of the participants to facilitate the most favorable matches.

## What Worked for Selection and Matching of Encore Fellows and Nonprofits

By all accounts, the selection and matching processes allowed for very successful matches, thus laying the groundwork for very successful engagements. Survey results show very high satisfaction with these processes (see Exhibit 5). What worked for selection and matching? And how did effective practices contribute to successful engagements?

Many nonprofit executives commented that much of the success experienced throughout the pilot year resulted from the personalities of the fellows. Civic Ventures selected fellows who were open to learning, and at the same time willing and eager to dive in and champion their projects. It is clear from all the interviews that an initial fear among nonprofits was that fellows would arrive at organizations and think they had all the answers. The assumption that a fellow was an expert coming into an organization to *solve* a problem would serve to undermine the very intent of the fellowships model. Instead, fellows needed to possess a delicate balance of strategic thinking and the humility to be willing to roll up their sleeves and execute project tasks. In the words of one interviewee, there was a tension between a need for "hands on the ground versus minds in the strategy room."

What worked in the selection of nonprofits was adhering to the criteria established during the design phase of SVEF. The process also sought outside input from community leaders with extensive knowledge of the organizations within the region, employing a "snowball" process where organizations identified by multiple key informants as being innovative, and with stable leadership, were marked for invitations into the pilot year. According to Civic Ventures staff, "We told [key informants] our criteria. We wanted budget stability in the organizations and influential leaders in the sector. From the bigger list, if we got recommendations from multiple sources, there was a pick-up on our end that this organization was one to



consider.” To Civic Ventures staff, it was also very clear that they needed to partner with nonprofit organizations with a history of “innovation and flexibility as we were figuring out the pilot year.”

A rigorous process for matching fellows with nonprofits was also critical in laying the foundation for success. In interviews, Civic Ventures was recognized as a “guide” and a “resource” throughout the matching and selection process. “Every success of the program is premised on healthy and productive working relationships. No matter how impressive the resume a fellow brings, if they can’t make the human connections to their hosting organization, they’re not going to be successful,” said one fellow. And Civic Ventures managed to navigate these waters.

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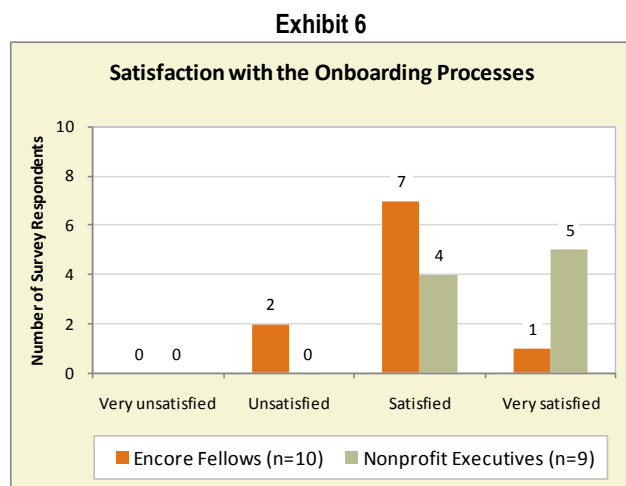
**Civic Ventures did a good job of introducing the concept and operating assumptions, and, most importantly, identifying enormously capable candidates. They were always available, forthcoming, and answered questions throughout the process.**

*Nonprofit Executive*

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## Onboarding

Bringing an Encore Fellow into a nonprofit was a learning process for all stakeholders. Orienting new staff and establishing traction within any organization is challenging and requires a deliberate and thoughtful approach. Exhibit 6 shows that nonprofit executives were satisfied with the onboarding process. However, fellows’ perception of the onboarding process, while still positive, highlights a need to refine and strengthen the onboarding process to better balance the fellow and executive experience. During the SVEF pilot, what worked in onboarding fellows was largely learned along the way, and was achieved at varying speeds and with varying degrees of intentionality. The findings discussed below highlight the retrospective assessments stakeholders shared with the evaluation team. In the pilot, the spirit of collaboration carried the effort, but there were clear lessons learned and recommendations for future program modification.



The involvement of nonprofit executives in the orientation and integration of fellows was essential to the onboarding process. In particular, the process was accelerated at organizations where there was a high degree of fellow and executive interaction from the outset. Advocacy and support from nonprofit executives set the tone with staff and identified the Encore Fellow position as prestigious. One executive said, “I wanted the Encore Fellow to operate fully as a peer to the senior staff team.” This access to organizational leaders at the highest level was critical to onboarding. The role nonprofit executives played in orienting fellows to their organizations, fellowship projects, and the sector overall is an important lesson to emphasize in future years of SVEF. While all fellows ultimately played prominent roles in the organizations at which they were matched, traction and impact occurred earlier where executives were actively involved in the onboarding.

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**The executive director made it clear that I was not replacing a job. He set the expectations and tone.**

*Encore Fellow*

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The role of the executive was also significant in introducing fellows into organizations and communicating to other staff the intended goals of the fellowships and attending to any concerns organizational staff may

raise in response to a former corporate employee working within their organization. It meant being sensitive to possible challenges and pushback from the staff. Just as nonprofit leaders expressed concerns that a fellow may assume their role is to *fix* a problem, nonprofit staff can also carry this worry. Many fellows recommended that the onboarding process could be improved by making it a standard practice for executives to share with staff and boards information about the fellow, such as a bio and an overview of the SVEF program, at the outset of the fellowships.

Beyond orientating fellows to the nonprofit organizations in which they will spend their fellowships, and to some degree, the sector overall, there are tangible readiness requirements such as a workspace and an Encore Fellow job description. There is an upfront need to plan for and make ready a work environment for a fellow. For instance, fellows need a physical space, but surprisingly, several fellows reported in interviews not having a desk or a computer set up. One fellow stated that, “My work area could have been cleaned. [...] My computer wasn’t set up. I was willing to do it myself, but some things I couldn’t do.”

The one caution consistently noted is a need for fellows and executives to be willing to revisit the position description and scope of work early on in the fellowships. As work progressed in nonprofits, many executives became aware of additional skills fellows possessed, and fellows identified new opportunities to use their skills to achieve results within organizations. The position descriptions served as important templates for orienting and attracting potential fellows, but are not cast in stone. The best engagements included check-ins between executives and fellows to revisit and refine the scope of work to improve the match between organizational needs and priorities and the skills and experiences of fellows.

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**The multiple iterations of the scope of work happened as trust developed. Once they see fellows deliver something tangible, [initially] meeting around the presenting need, and then adapting when fellows are viewed as offering so much more than that.**

*Civic Ventures Staff*

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Readiness on the part of nonprofits is critical to the successful integration of Encore Fellows. Civic Ventures established criteria, including organizational size, stability of organizational leadership, and a flexibility and an openness to experiment, that ensured a minimum level of readiness to integrate Encore Fellows into nonprofits. Fellows, too, were attuned to the readiness factors, with one commenting that “the readiness and ability of an organization to deploy and take advantage of the experience of the fellows was a big thing.”

## Effective Onboarding is Key to Success of the Fellowships

As soon as one executive director learned that his nonprofit was matched with an Encore Fellow, he began preparing his staff and laying the groundwork for the Encore Fellow to enter into an “environment of cultivation.” The executive director knew that he wanted the Encore Fellow to operate as a full member of the senior management team; however, he also knew that he needed to invest time in getting buy-in from the senior team and mediate the dynamics that inherently arise when you bring a new high-level executive into an existing team. Before the Encore Fellow even started, this executive director dedicated time to having candid conversations with his senior staff about the SVEF pilot in general, the potential impact a fellow can have on their organization, and how their organization could most effectively use and take advantage of the fellow’s experience and expertise.

This nonprofit also had the benefit of having recently completed a year-long strategic planning process to outline their priorities for the next five years. The strategic plan outlined marketing and communication as a priority area and, therefore, the organization was primed to take on a former corporate executive with years of experience and expertise in this area.

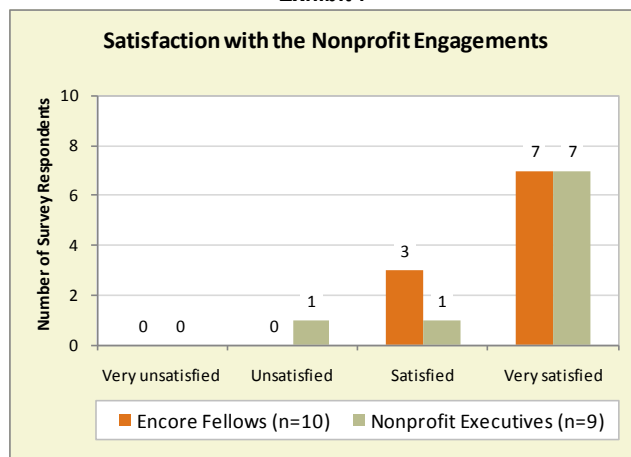
Once the Encore Fellow started her fellowship at this nonprofit, the executive director made every effort to introduce and integrate her into every facet of the organization. The executive director invited the fellow to participate in regular senior staff meetings, board meetings, and other convenings and opportunities for the fellow to meet and get to know the many other people that operate the organization, which includes about 31 staff, 130 faculty members, and 21 board members. The executive director noted, “The eventual success of the ‘marriage’ was owed largely to the care we took to prepare the fellow and making her feel welcome and integrated into the organization.”

## Nonprofit Engagements

The SVEF pilot was designed to create meaningful experiences for both fellows and nonprofits through high-impact assignments. Overall, Encore Fellows and executives expressed overwhelming satisfaction with the engagements in which Encore Fellows worked; all ten fellows and eight out of nine nonprofit executives were satisfied or very satisfied with the engagements (see Exhibit 7).

Both Encore Fellows and nonprofit executives reported that engagements were most successful when the pairs collaboratively set expectations and closely monitored projects, ensuring that the project goals were realistic given the timeframe and resources available. While it was important for Encore Fellows and nonprofits to clearly articulate expectations and define the scope of work at the outset of the engagement, many executives and fellows expressed a need to revisit the originally outlined scope of work once a fellow had a chance to get up to speed at an organization. Through interim process check-ins – either conversations between fellows and nonprofit executives or progress reports required by Civic Ventures – fellows and executives adjusted the scope to ensure there was alignment between a fellow’s skills and a nonprofit’s needs. One nonprofit executive shared that “there *should* be some kind of job description ... you can share with a fellow [in advance of a match]; but after the first month you have to revisit it. Did we match up right? There are skill sets we didn’t even know about.”

Exhibit 7



The additional step of monitoring projects throughout the fellowships facilitated successful nonprofit engagements that led to both immediate and longer-term impacts. Many Encore Fellows identified tasks that needed to happen before or during implementation of the project in order to achieve success. Had Encore Fellows or nonprofits *not* been willing to accommodate changes from the original job description and scope of work, engagements may have resulted in lower levels of success. The flexibility and willingness to adapt the scope of work as needed from both Encore Fellows and nonprofits allowed projects to successfully evolve to meet the needs of the nonprofits.

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**It's also important to circumscribe any expectations. Be clear about how much you can realistically expect to accomplish in the timeframe, the number of hours, and the financial resources that might be needed. You also need to constantly monitor people close to the process.**

*Nonprofit Executive*

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Granting fellows ownership over projects empowered them to champion reassessment of the scope and project implementation and adjust tasks as necessary to achieve success. One executive commented, "Project ownership by the fellow, with staff support, rather than vice versa, is a good idea." Granting fellows autonomy encouraged them to reflect on their own role and advocate for scope of work adjustments that would result in the greatest impact. This reflection exercise also generated greater organizational and project buy-in among fellows. Often, revisiting a scope of work led to an expansion of the fellow's role. One fellow questioned, "This job evolved, but it began with a narrow view. [...] I asked, 'is this really the highest impact thing I could be doing?'"

Having meaningful projects with high impact on the organization was one of the strongest contributing factors to the success of the engagements. All fellows expressed strong satisfaction with the extent to which their projects appropriately called upon their areas of expertise. Fellows also noted that the biggest motivator throughout the fellowships was the feeling that they were engaging in meaningful work that was making an impact on the organizations and the constituents these organizations serve. The evolution in scopes of work always reflected the fact that fellows were inspired to work in areas of the organizations where they were most needed.

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**For people who have worked as long as I've worked, it is all about the bottom line impact. "Have I made a contribution?" It's the single biggest thing I kept asking myself.**

*Encore Fellow*

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Successful engagements were also notable in the ways in which fellows engaged in the execution of projects and in thought leadership with senior organizational staff. One nonprofit executive commented, "We really needed someone who was functioning at a high concept level but who was also willing to roll up her sleeves and do the work too." Nonprofit engagements were regarded as especially successful when Encore Fellows not only introduced new strategies, approaches, and processes, but also carried these ideas through to fruition and worked closely with other staff to do so. In these cases, the Encore Fellows delivered tangible proof of concepts that allowed nonprofits to measure success.

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**Our fellow made a great contribution to our organization by participating as a senior staff colleague – across disciplines and departments – and by being the catalyst and driver of innovative approaches to our work.**

*Nonprofit Executive*

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## Length of Engagement

Nine of the fellows did half-time, 12-month fellowships, while one did a full-time, six-month fellowship. Towards the end of the pilot, a majority of nonprofit executives offered the perspective that six months (full-time) is not long enough for fellowships. Twelve-month half-time engagements allow for more

effective engagements and opportunities to impact nonprofits. They felt that a fellow needed more time to become acclimated in the nonprofit environment, lead a significant project, and initiate change within an organization that is sustainable. While one Encore Fellow who did the six-month fellowship was still able to achieve successful outcomes and impacts, she noted, “I could have been more productive, [but] I didn’t have a whole year.”

While Civic Ventures did not initially design the SVEF pilot this way, one fellow chose to split his half-time equivalent fellowship between two nonprofits. Spending half-time equivalent fellowships across more than one nonprofit resulted in less traction within organizations. Working within two nonprofits requires more fixed time for onboarding to organizations and projects, taking time away from the actual project work. As one fellow commented, “When you take fifty percent of your time and split it in two, it gets hard to manage and use time effectively and have the high impact. [...] It left relatively little time for project work at each organization, which was frustrating to me.” Engaging in one organization allows Encore Fellows to achieve larger and more concentrated impacts than managing projects within two organizations as well as allows fellows to develop deep connections with nonprofits’ missions.

## Learning Community

A highly valued aspect of the SVEF pilot was the role that Civic Ventures played in bringing fellows together each month. During some meetings, nonprofit executives were invited to listen and participate. These convenings allowed fellows to learn from one another and from the nonprofit executives. One fellow said that the convenings allowed them to create an “instant network” which would be of lasting value through the remainder of their careers. The learning community was also an opportunity for fellows to hear speakers talk about fundamental aspects of the nonprofit sector overall.

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**The peer group is the most important aspect. There are some real benefits to being together in the experience.**

*Encore Fellow*

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However, many fellows remarked that the monthly convenings could actually play a larger role in orienting fellows to the nonprofit sector and in sharing important project lessons. All stakeholders felt that the monthly convenings offered a significant opportunity to provide a structured orientation to the nonprofit sector. In their opinions, meetings could be structured around understanding the legal status of nonprofits, the role of a board, funding streams, and accounting, as well as the challenges that nonprofits typically face. Civic Ventures could be “more rigorous around what you really need to know if you’re coming from the corporate sector and need to get exposed to in the nonprofit sector.” Several interviewees stated that going to the one-day seminar with Heather McLeod Grant was excellent. “I’d like to see more of that,” said one fellow. In an already tightly scheduled year, fellows noted that while it was valuable to share introductory and descriptive information about the fellowships in the early stages they would have appreciated more convenings that concentrated on learning about the sector or important lessons from fellows’ projects in the later stages of the pilot.

Additionally, the learning community provided an opportunity to address challenges fellows may be experiencing associated with transitioning into a new role in a new field. These group settings offered a chance for all participants to learn from the actions taken to address transitional challenges. One executive stated, “It was only as we met with other Encore Fellow groups that we realized

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**I learned what happens in my own nonprofit and the eight others. We learned what they’re doing, what issues they’re facing, and what the nonprofit world is all about.**

*Encore Fellow*

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that we were set up differently.” As a result of the meeting, the reporting structure for this fellow was changed so that the fellow could “have more access to [the executive director] and an opportunity to see how a nonprofit is run at the highest levels.”

## Stipend

The fellows used terms such as “critical” and “important” to describe the stipend: getting paid for the work made the fellows feel valued. One fellow said, “It’s back to the value question. We’ve all come out of the world that thinks in terms of bottom line dollars. But the number wasn’t as important – [it was] just the fact that there was something there [to show we are of value].... It makes a statement.” Even though the nonprofits did not pay any portion of the stipend during the pilot, fellows felt that the stipend increased the nonprofits’ perception of the value of the fellowships. Fellows anticipate that this perception will only be enhanced as nonprofits contribute materially to the stipend – that this contribution will “increase the commitment of the nonprofit.”

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**I would not have done it for free; it puts a value on what you are doing as important.**

*Encore Fellow*

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What are the elements of the stipend that are important? One is the simple fact that the fellow is doing paid work rather than volunteering: in our society worth is often measured in dollars, so the fact that dollars are involved means that a fellow has worth. The other element is the dollar amount. Fellows repeatedly said that the dollar *amount* was not as important as the fact of doing paid work, but several also said that \$25,000 was at or near the floor of what would have made it worthwhile for them. However, even the amount was not about financial need or desire to earn a high salary – the amount was *still* about value in the sense of meaning and commitment. The theme of paid work as something that supports commitment was common. One fellow said that “you need something to keep people in the game. If it’s free I could walk away anytime.”

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**For me, \$25,000 wasn’t the floor but as it goes down, the meaning drops too. \$25 an hour is way less than what I’m used to charging, but it’s still meaningful enough. [...] Below \$25,000 might erode the commitment value of it both ways.**

*Encore Fellow*

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The stipend appears to be a very important component of the SVEF model, even if the money attracts people because of its *meaning* rather than its ability to support the fellows financially. Fellows made clear that in the areas that they live, they were able to afford to work for this stipend only because they had other sources of financial support. When asked about the sufficiency of the stipend, one fellow remarked, “Actually it doesn’t work from an economic standpoint. But if the individual isn’t driven by economics, and they have other ways to sustain themselves, it will work.”

There is early evidence that the stipend works for the nonprofits as well. In the pilot, the stipend worked especially well given the fact that nonprofits did not pay it, or even a portion of it. However, this has changed with the strong success coming out of the pilot and the evidence that the value of a fellow was worth many multiples of the stipend’s dollar amount. In the second year, nonprofits are willingly paying half of the stipend, and the cost of participation did not slow the nonprofit demand for participation in the SVEF program.

Even with the success of the pilot, taking on a fellow is not without its risks. Nonprofits take a risk when they bring on fellows who come from outside the sector and for whom the fellowships were a learning experience. For this reason, the dollar amount of the stipend that looks reasonable to the nonprofit may be reached at a fairly low ceiling. Ultimately, the amount that nonprofits contribute to the stipend should be significantly lower than what the organization would pay for an equivalent employee with social sector

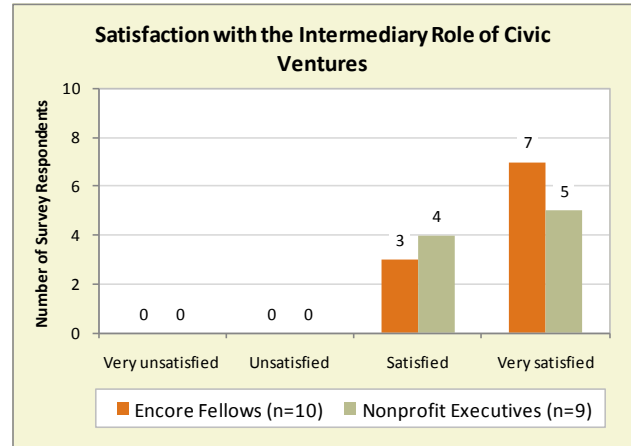
experience. This “discount” will compensate the nonprofits for the risk that they assume when a fellow joins their organization.

## Role of the Intermediary

For the SVEF pilot, Civic Ventures acted as an intermediary, connecting fellows with nonprofits, and bringing in funders and a corporate sponsor. Civic Ventures staff also administered the pilot, selecting and matching fellows with nonprofits, and providing continuing support throughout the engagements. In survey data (see Exhibit 8) and stakeholder interviews, evaluators heard that Civic Ventures brought considerable value to this role.

As we have seen in the sections on selection and matching, and on the learning community, participants deeply appreciated Civic Ventures for the role that they played. Several interviewees credited the success of the engagements to the selection and matching processes, and fellows found the monthly convenings extremely useful. Civic Ventures brought premium value beyond those tasks of program implementation; Civic Ventures has the connections and the credibility to bring together funders, corporate sponsors, and nonprofits. Because of its reputation and its broad networks, Civic Ventures has the capacity to bring together all of the key players. Staff have deep knowledge of the local nonprofit terrain, and also know how to market the idea to nonprofits. They also have long-held connections to funders who believe in the work that they already do, and so are enthusiastic about funding SVEF. Finally, their connections with corporations are critical to bringing in partners from the private sector.

Exhibit 8



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**I think Civic Ventures brought vision, credibility, and inspiration around this concept. In the beginning, this was critical to people putting skin in the game and jumping off the dime.**

*Corporate Sponsor*

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## IV. High-Impact Engagements

The components of the SVEF model are meant to combine to result in a high-quality engagement, in which: the projects the fellows undertake have a high impact on the organization; nonprofit executives become more open to hiring from the private sector; and fellows confirm or increase their commitment to the social sector. This chapter discusses the impact that the engagements had on the fellows and the nonprofits, and then explores those factors that led to these impacts.

### Impacts on the Encore Fellows

The SVEF pilot provided unique opportunities for fellows to take meaningful action within the social sector. The fellowships also served as an experiential pathway for fellows to transition into the next phases of their careers. This section of the report highlights the impacts and benefits that fellows commonly experienced during their fellowships.

Encore Fellows came into the pilot with varying degrees of experience and knowledge of the social sector, and the fellowships increased their overall awareness and knowledge of the sector. Through their engagements with nonprofits, Encore Fellows increased their understanding of nonprofit culture, governance, field areas, program implementation, and the challenges facing the sector. Many fellows indicated that the fellowships have been eye-opening experiences, offering a strong foundation of knowledge about the social sector onto which they can continue to build.

Encore Fellowships increased fellows' confidence in their ability to transition into the social sector, and reinforced their desires for pursuing encore careers. Seven out of ten of the Encore Fellows were likely to pursue careers in the nonprofit sector *prior* to participating in the fellowships; and, participating in the SVEF pilot validated their intention to transition into the social sector (see Exhibit 9). One fellow stated, "I believe that I can be an effective leader in the social purpose sector based on this experience." After participating in the fellowships, all ten fellows reported that they are likely to pursue encore careers in the nonprofit sector.

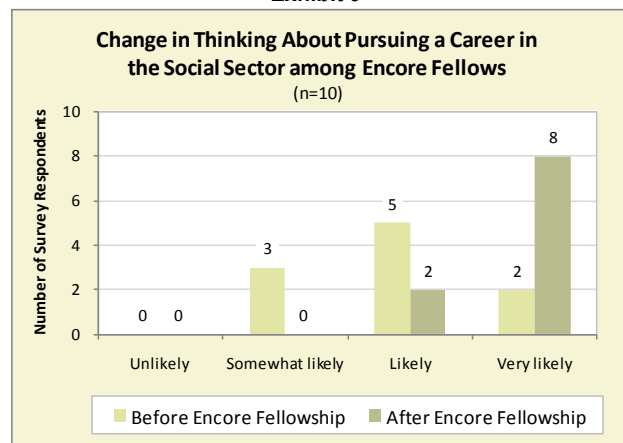
**[The fellowships] change you very fundamentally. There is no question that I want to spend the majority of my remaining working life in the nonprofit sector.**

*Encore Fellow*

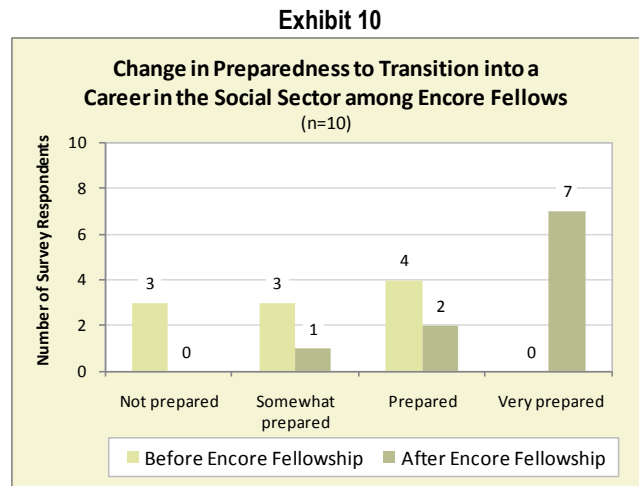
**I understand the [nonprofit] sector in a way that I didn't before. I understand the challenges and passion of people who give their lives to their causes. I am impressed by their commitment and passion.**

*Encore Fellow*

**Exhibit 9**



Encore Fellowships accelerated fellows' journeys into the social sector by providing real experience and connections. Prior to participating in the fellowships, only four out of the 10 fellows felt prepared to transition into a career in the nonprofit sector (see Exhibit 10). However, following participation, nine out of 10 fellows reported feeling prepared to make the transition into encore careers within the nonprofit sector. In addition, fellows gained direct connections and networks within the sector that will facilitate future opportunities. Finally, nine fellows were offered jobs at the organizations in which they spent their fellowship year; and four fellows received additional job offers at nonprofits other than the ones at which they spent their fellowship year. Five fellows accepted temporary or permanent positions at their sponsoring nonprofits and three accepted jobs at other social sector organizations. This is perhaps the best proof that the SVEF model offers an experiential pathway to transition into an encore career within the social sector.



Encore Fellowships shifted fellows' attitudes toward nonprofits. One fellow commented that she previously thought nonprofits were "not focused on being sustainable [...] and strategic." Participating in the fellowships increased fellows' respect for nonprofit culture and staff. The result is that Encore Fellows came to understand that nonprofits can be high-performing, results-focused organizations, albeit in a resource-strapped environment. Another fellow noted while she was always interested in the nonprofit sector, she now has a greater "appreciation for the types of jobs and work that is done."

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**I have learned a tremendous amount about the [nonprofit] sector and the players in it, and have gained a lot of respect for people in the [nonprofit] sector.**

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*Encore Fellow*

### An Encore Fellow's Experience...

During 25 years in marketing and management for the technology industry, this Encore Fellow had little involvement in the nonprofit sector. Yet, he always knew that he wanted to get involved in more meaningful work, perhaps in the education field. As retirement approached, this fellow tried to enter the nonprofit workforce. His efforts were unsuccessful as the realization emerged that there were significant operational differences and motivations between the nonprofit and corporate sectors. Making the transition would require an entrée. Civic Ventures' SVEF pilot was just that; and when his employer's human resources department suggested he participate it was an easy decision.

He was matched with a nonprofit in the education field and charged with developing a marketing plan for a newly opened satellite office. Over the course of the fellowship, this fellow gained a thorough understanding of the organization and its mission, and about the nonprofit sector more broadly. The fellowship offered an opportunity to contribute at the highest levels of a nonprofit organization and to understand that in the social sector, everyone must roll up their sleeves to get things done. He gained concrete experience in a wide range of nonprofit operations, including: conducting outreach to principals and teachers, working "on the floor" in sales and membership, engaging with board committees, advocating for the organization, developing partnerships with other nonprofits, and most importantly engaging in significant conversations with the senior management team. After just five months, this fellow transitioned into a full-time position as the director of marketing the organization.

The transition to the nonprofit sector became temporary when the fellow realized the financial shift this job (and the national recession) would require. It was a gut-wrenching decision to return to the corporate sector primarily for financial reasons. However, this Encore Fellow returns to the corporate world with a newly developed perspective on work, his immediate goals, and future aspirations. The fellowship completely changed his attitude towards work culture, commenting that he will go into his new job with a renewed outlook on how to navigate the politics and competitiveness of the corporate world. The fellow intends to maintain ties to the social sector by actively participating in corporate philanthropy and by joining the board of the nonprofit where he completed the fellowship. The fellow has little doubt that he will return to the nonprofit sector, and that the avenues available to him to work in the sector will be far greater as a result of his participation in the SVEF pilot.

### Impacts on the Nonprofits

Encore Fellows' expertise and experiences were brought to projects and activities that would ultimately impact the overall organizational capacity of the participating nonprofits. Regardless of the specific projects and deliverables that Encore Fellows accomplished, many stakeholders commented that the mere presence of former corporate executives increased the capacity of nonprofits and staff in numerable, unanticipated ways. Exhibit 11 highlights the areas in which Encore Fellows participated in nonprofit engagements and enhanced organizational capacity. As the table shows, many Encore Fellows engaged in marketing projects, followed by strategic planning and communication.

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**The Encore Fellowship has been one of the most impactful opportunities this organization has ever received.**

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*Nonprofit Executive*

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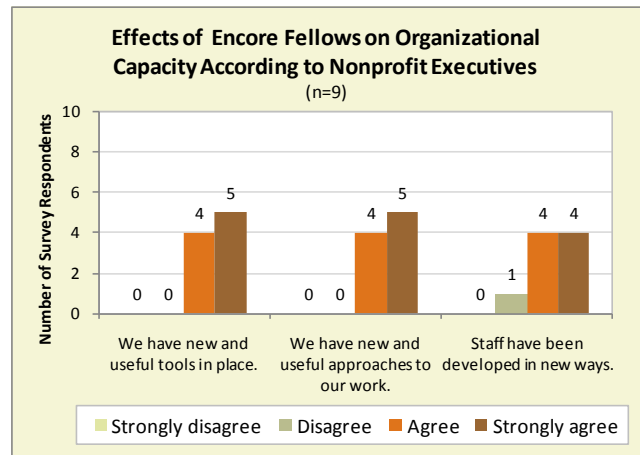
Exhibit 11

Encore Fellows' Impacts on Nonprofits' Organizational Capacity									
Nonprofit	Capacity Areas								Strategic Planning
	Communication	Finance	HR	Marketing	Outreach	Partnership Development	Research and Evaluation		
Aspiranet				✓		✓			✓
Citizen Schools	✓			✓					
Civic Ventures									✓
Community School of Music and Arts	✓			✓					
Environmental Volunteers	✓			✓	✓				
Partners in School Innovation			✓				✓		✓
Resource Area for Teaching				✓					
Silicon Valley Education Foundation		✓	✓						✓
Youth Community Service				✓		✓			

Eight out of nine nonprofit executives agreed or strongly agreed that staff have been developed in new ways as a result of bringing an Encore Fellow into their organization (see Exhibit 12). Several of the Encore Fellows joined the senior management teams within the nonprofits where they were able to offer advice to the leadership team and enhance their overall effectiveness. In several cases, Encore Fellows served as mentors, management or leadership coaches, and thought partners for nonprofit executives. One nonprofit executive commented, "I immediately began using [our fellow] as a mentor. [...] I have learned some skills and gained confidence in myself." Many executives commented that the fellows raised the performance bar and pushed them and their staff to produce at higher levels. One executive noticed that the presence of the fellow inspired her staff to work as a cohesive team and she can now hold the team accountable to that high-level of functioning when the fellowship ends. Another executive observed that during the fellowship "everybody is on their toes in a really good way."

Nonprofit executives consistently reported that Encore Fellows reinforced strategic thinking, approaches, and processes. All of the nonprofit executives agreed or strongly agreed that the Encore Fellows introduced new and useful approaches to their organizations, as shown in Exhibit 12. While the nonprofits already had clear organizational missions and objectives, the Encore Fellows brought with them business-minded approaches that enhanced the nonprofits' abilities to achieve their missions. One nonprofit executive commented, "There are many circumstances when we don't apply sound business strategy. Having [an Encore Fellow] made it okay to [apply business strategy] without feeling like we're selling out

Exhibit 12



**We have a clear objective for the organization, we have a clear focus on what we will do, and we have a partnership model template that we didn't have before. That's led to an increase in fundraising, outreach, and community impact.**

*Nonprofit Executive*

on mission and principles.” Nonprofit executives consistently observed and reported shifts in organizational processes, work culture, and behaviors that have helped their organizations more clearly focus on their missions.

The Encore Fellows emphasized a degree of discipline and project management that increased organizations’ capacity to see results. Nonprofit executives were impressed by the rigor, speed, and independence that fellows displayed. It consistently showed up in how they managed projects. Some fellows encouraged their nonprofits to become more performance-oriented and to increase the effectiveness of how they operate. One executive commented, “They’ve opened the eyes of staff in terms of working in much more disciplined and measurable ways.” One executive shared that the fellow helped their organization to see the relationship between a business plan and a marketing plan and the fellow encouraged the senior management team to have “more practical- and tactical-minded conversations than before.” Fellows helped to create strategic alignment between all of the various departments.

All of the nonprofit executives agreed or strongly agreed that they have new and useful tools in place as direct results of the Encore Fellows’ engagements (see Exhibit 12). Some examples of tools established within the nonprofits include: marketing plans with messaging and branding strategies; frameworks for developing and expanding partnerships with other organizations; electronic data management systems, structures and guidelines for board management and governance; human resource proposals; and financial management proposals, among others. By introducing and executing the implementation of these different tools, Encore Fellows elevated the nonprofits’ capacity to provide high quality services and programs.

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**He took the volunteer program [and] automated it. He created a calendar where volunteers can sign up on the website.**

*Nonprofit Executive*

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Nonprofit executives and fellows deliberately ensured that sustainability was planned for and built into the projects so that the longevity of the tools introduced would outlast the fellowships and become embedded into organizations’ standards. As one nonprofit executive assured, “The tools and key messaging [that our Encore Fellow introduced] will become part of our arsenal of materials.” Executives and

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**I made sure what we built was sustained. “I’m going to do it first, then we will do it together, then you do it.” That’s really important when you can do the handover.**

*Encore Fellow*

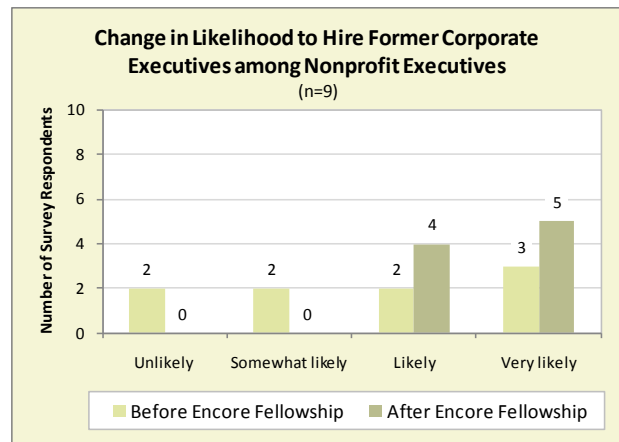
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fellows often developed transition plans to hand over the projects and tasks for internal staff to continue implementing or they identified the need to hire someone to permanently fulfill the role that fellows played. Nonprofit executives commented that the fellows have laid foundational strategies and processes that will continue to live and influence organizational operations.

The duration of the fellowships allowed Encore Fellows to implement and execute strategies and reinforce behavior changes to “ensure that capacity was built and sustained.” Stakeholders also pointed out the ways in which the work that the Encore Fellows do has the potential to provide more sustainable capacity than what a capacity-building grant would buy. Several made the argument that capacity-building grants typically buy a consultant’s time, whereas the fellow is an actual employee who becomes embedded in the organization. A fellow argued that fellowships differed from consultancies in the following way, “The difference is when you’re a fellow you have an operating role. [...] You’re on the inside. You develop trust and insight that allows you to integrate, make change from within, but also bring outside experience and perspective. [...] It’s different than someone who comes in for six weeks... For me, success was when *they* were successful. [...] My goals were their goals.”

A result of the SVEF pilot is that it positively shifted nonprofit executives' willingness to hire former corporate executives. Prior to participating in the SVEF pilot, five out of nine nonprofit executives were likely or very likely to hire former corporate executives with no nonprofit work experiences (see Exhibit 13). However, after having an Encore Fellow at their organizations, all nine nonprofit executives reported that they are likely or very likely to hire former corporate executives. Clearly, nonprofit executives see the value of and transferability of skills and experience of former corporate executives. One nonprofit executive stated, "I have expanded my perspective and realize that there are for-profit executives who are strong on 'heart' and can be great assets to the [nonprofit] sector." For nonprofit executives who were doubtful of the transferability of skills and experiences, the SVEF pilot has proven that, given the right combination of people, these two seemingly different sectors can be successfully coupled to achieve positive social impact.

Exhibit 13



**In the past, if I had seen [my fellow's] resume with no nonprofit experience, I would not have thought about it or looked at it twice. Now that I have seen how easily [my fellow] made the transition, I will definitely consider them. I would meet them more quickly and sometimes maybe ahead of the nonprofit applicant.**

*Nonprofit Executive*

### An Encore Fellow's Impacts on a Nonprofit...

One Encore Fellow had over 25 years of experience in executive compensation and human resources. This fellow was matched to an organization seeking to improve its human resource practices, enhance its advisory committee management, and establish finance and accounting processes and procedures. Within the first three weeks of the fellowship, this fellow put together a proposal to outsource their human resources process. After receiving approval from the board of directors, the fellow proceeded to interview several Professional Employer Organizations and three weeks later hired a provider. The executive director stated that within the first six weeks of the fellowship, "[the fellow] established a long-term solution for our human resource needs" which will allow for greater efficiencies in the human resources department and "translate into greater future cost savings as [the organization] grows."

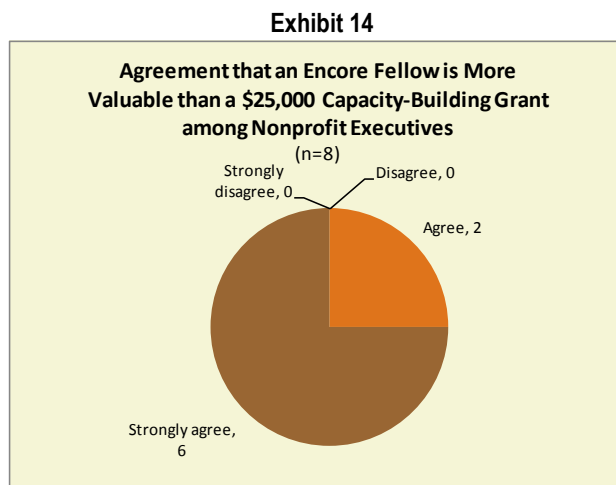
This fellow also led the senior management team in developing a five-year strategic plan by introducing new tools and processes. The fellow's support helped the organization focus on their mission and better define their strategies. One executive within the organization explained that they could have supported these tasks internally; however, having "a fresh, unbiased, external perspective" to help them identify clear objectives for the organization provided essential motivation in doing the job and doing it well.

In addition to these tangible results, one unanticipated outcome of this fellowship was leadership coaching. The fellow and CEO met regularly throughout the fellowship, with the fellow serving as a sounding board for a variety of organizational issues. As one senior staff member observed, "[The Encore Fellow] has really been an asset for our CEO. [He] now has someone that he can go to for advice and guidance." The fellow was able to share their personal experience as an executive and provide feedback and input to help the CEO to develop into an even stronger leader.

## Value Proposition

What is the unique value that the SVEF model offers to nonprofits? A successful engagement with an Encore Fellow means access to the contribution of an experienced employee who builds the capacity of the organization, brings useful private sector practices, and delivers in value a high multiple of the dollars paid to the fellow.

The experience of participating nonprofits shows that having an Encore Fellow on staff can build organizational capacity, including new systems, tools, and practices. To look more closely at the issue of the value of the fellowships this evaluation investigated, in both surveys and interviews, the question of whether a \$25,000 investment in an Encore Fellow's stipend is worth as much as, or more than, a more traditional capacity-building grant. In evaluation surveys, all nonprofits executives (and almost all stakeholders interviewed) believe that a \$25,000 investment in a fellow's stipend garners a much greater return than a \$25,000 grant (see Exhibit 14). At the most basic level, the favorable comparison of the Encore Fellow's work to a capacity-building grant is a result of the fact that people feel that the value of a fellow's work exceeds the \$25,000 that it costs. In the words of one nonprofit executive, "It's not even close. The value that we got from [our Encore Fellow] was so much greater than what \$25,000 worth of capacity-building assistance would have gotten us."



An especially striking piece evidence of the Encore Fellows' value is the fact that most of them received job offers at their organizations. In their survey responses, a majority of the eight nonprofit executives estimated the work of their Encore Fellows to be worth a full-time annual salary of \$100,000 or more. Their view of a hypothetical salary was manifested in actuality as well: four fellows were offered full-time jobs at salaries of \$100,000 with benefits and five were offered part-time consultancies at FTE rates of \$125,000-\$175,000.

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**Even though the fellows are costing \$25,000, they are doing \$100,000-\$200,000 worth of work.**

*Nonprofit Executive*

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Despite the greater value that most informants placed on fellows in comparison to capacity-building grants, there are some dissenting views: some informants cautioned against seeing a fellow as more valuable in all cases. Three representatives from the same foundation made the point that a capacity-building grant still has its place, and may be what a nonprofit actually needs, rather than a resident fellow. This is especially the case when a nonprofit has a specific capacity area that needs building (for example, governance, an HR system, marketing, or a strategic plan), and the fellow may not have expertise in this area. These informants did not agree with the blanket statement that a \$25,000 investment in a fellow is always more valuable than a \$25,000 capacity-building grant. One funder, in making the comparison, stated, "I actually think it is about the same level of risk and offers about the same potential transformation for an organization."

## V. Conclusion

The SVEF pilot aimed to create a marketplace for highly-skilled, executive-level employees to bring their expertise and experiences to support nonprofits in meaningful ways by creating transitional pathways for individuals to move across sectors into an encore career. The SVEF pilot proved remarkably successful at achieving this goal. Among its accomplishments, the pilot can count the following:

- Encore Fellows made substantial contributions to nonprofit capacity (including staff development, new approaches to the work, and new tools in place);
- After the fellowships conclusion, fellows were more likely to pursue a career in the nonprofit sector;
- Likewise, nonprofit executives were more likely to consider hiring individuals coming from the private sector;
- Nonprofit executives rated the dollar value of the fellows' contribution at several multiples of the stipend amount; and
- Nine fellows were offered jobs at the organizations in which they spent their fellowships and all ten pursued temporary or permanent positions in the social sector upon completion of the fellowship.

The success of the program can be traced to the skill of the program operators at Civic Ventures, and a number of components of the program design, including:

- Criteria for choosing Encore Fellows and participating nonprofits;
- An effective matching process that resulted in good fits between fellows and nonprofits;
- Onboarding processes that allowed fellows to hit the ground running;
- A stipend that communicated the value of the fellows to the fellows themselves as well as to their nonprofits, and bolstered commitment on both sides; and
- Convening of the learning community that allowed fellows to learn from one another and develop a professional network.

The SVEF pilot provided early proof points for a program that can potentially make important impacts on nonprofit capacity, deepen the talent pool available to nonprofits, and provide a new career path to encore careers. In order to replicate the model so that it can have such impacts at a much greater scale, Civic Ventures has plans to catalyze scaling through a network strategy. Civic Ventures has established the Encore Fellowships Network, which is designed to support replication of the SVEF model with information, tools, and connections. In essence, Civic Ventures is developing this new field, and will play a prominent role in documenting program outcomes and indicators and tracking variations of the SVEF model to provide evidence of the program's success in different environments.

## Appendices

**Appendix A: Interview Protocol with Encore Fellows**

**Appendix B: Interview Protocol with Nonprofit Sponsors**

**Appendix C: Interview Protocol with Civic Ventures Staff**

**Appendix D: Interview Protocol with Corporate Sponsors**

**Appendix E: Interview Protocol with Philanthropic Sponsors**

**Appendix F: Survey with Encore Fellows**

**Appendix G: Survey with Nonprofit Sponsors**

## Appendix A: Interview Protocol with Encore Fellows

Fellow:
Nonprofit:
Interview Date:

### Introduction

Thank you for taking the time to provide your input and insight into Civic Ventures' Encore Fellows idea and its pilot year. Civic Ventures engaged LFA Group to conduct these interviews in order to tell the story of the SVEF pilot year and to extract instructive lessons about the Silicon Valley Encore Fellows (SVEF) model – how it contributes to the social sector and to the creation of encore careers. Our evaluation aims to identify and highlight aspects of the SVEF pilot that resulted in successful matches between fellows and nonprofits; explore the experiences of fellows to understand the skill set required to successfully transition into the nonprofit world; explore the preparedness of nonprofits to engage fellows in meaningful work; examine the role that corporations can play in steering employees toward “encore” careers; and, investigate the scalability of the SVEF model. The product of our work will be an assessment report of the SVEF pilot year that aggregates interview findings and includes a section on scaling the model. Additionally, LFA will work with Civic Ventures to identify evaluation needs and opportunities as the SVEF model expands. As you know, Civic Ventures has shared with us many of the documents and reports on the Encore Fellows activities. Members of the LFA team also attended the recently held retreat on expanding the model. These have provided our team with a substantial amount of background information to inform this conversation. The following questions aim to go deeper and focus more narrowly on your experience at [INSERT ORG NAME], as well as your thoughts on the Encore model overall.

Please know that given the small circle of stakeholders, and Civic Venture's desire for candid, direct input this interview is not confidential. We encourage you, however, to be as open and honest as possible. For this reason we are hoping that if there are things you feel are important to share, but wish to remain confidential, please let me know. We will handle this by compiling a confidential document of information provided by key informants about their experiences, or the idea overall. We will make anonymous any quotes to be shared with Civic Ventures in this fashion. The ultimate goal is that we provide Civic Ventures with the best, most complete set of findings. And, we hope this best supports your honest contributions to this assessment process.

We expect this interview to last about an hour and a half. Do you have any questions before we begin?

### Introductory/Background Questions

1. Can you please tell me a little bit about yourself particularly about aspects of your personal history that motivated you to become an Encore Fellow. What are the key things to know about you?  
*Probe:* About your career?  
*Probe:* About your motivation to transition out of the corporate world into the nonprofit sector?  
*Probe:* What initially attracted you to the Encore Fellows program?  
*Probe:* Do you intend to pursue an encore career after participating in the Encore Fellows program?  
Were you going into the Encore Fellowship thinking that this was a gateway into a career in the nonprofit sector?

### Matching Process

2. Please share a little about how you personally made the selection to work with [INSERT ORG NAME].  
*Probe:* What aspects of [INSERT ORG NAME] contributed to your decision to work with them? (e.g., Was it the nonprofit's mission? Target population? Job description?)

*Probe:* Are there things you wish you knew at the outset about this organization in particular or nonprofits in general that you know now?

3. What are elements that made for a good match?
4. What are elements that made for an imperfect match?
5. What are the elements that facilitated a successful on-boarding process? How could the on-boarding process been improved?
6. Can you talk a little about the projects that you have been engaged in as a Fellow at [INSERT ORG NAME]?

*Probe:* Did the projects you worked on call on your experience appropriately? (e.g. In your opinion was the work you were engaged in meaningful, high-level work linked to your skill set or rather were you asked to be an extra set of hands for projects outside your skills and experience)

*Probe:* What, in your opinion, are the elements of a high quality assignment?

*Probe:* What challenges or barriers did you face in implementing your projects?

### **Impacts on the Organization**

7. What are the main impacts you feel that your presence has had on [INSERT ORG NAME]?  
*Probe:* What is true about [INSERT ORG NAME] today that was not true when you started as a Fellow?  
*Probe:* Can you talk a little about specific new tools, behaviors, or strategies that are now in place at the organization?
8. Can you talk a little about the extent to which the impacts you contributed to were the result of hard skills or connections?
9. Were the work goals established during the onboarding process met?
10. Does [INSERT ORG NAME] have an action plan for continuing to implement or build upon the work that you have conducted?  
*Probe:* Do you think the organization realistically has the capacity to carry this on?

### **Impacts on the Fellow**

11. Please describe how the experience of being an Encore Fellow has impacted you?  
*Probe:* How has it impacted your understanding of how you will spend your energies in the next 5 years?  
*Probe:* How has it impacted your perceptions of the nonprofit sector?  
*Probe:* How have you impacted the perceptions of nonprofits about hiring from the for profit sector?
12. To what extent does an Encore Fellowship prepare individuals for a career in the nonprofit sector?  
*Probe:* What skills or knowledge did you accumulate throughout the year?
13. What other impacts did the fellowship have on you and your perspective on “retirement” from the corporate sector?
14. How has participating in the Encore Fellowship changed your attitudes towards pursuing an encore career?

15. What role does the Encore Fellowship play in your transition to an encore career?

### **The Model**

16. Thinking about the Encore Fellowship model, what worked well? What do you recommend that Civic Ventures' carries forward into the next pilot year?

17. If you were attempting to replicate this model in another location, for example Durham, N.C., what elements of the model would you insist be included? Which elements of the model are unessential or didn't work?

*Probe:* Are there aspects of the model that lend themselves to regional modification?

18. What value does Civic Ventures add to the model as an intermediary?

*Probe:* What has the relationship with Civic Ventures been like throughout the pilot year? What would you like to see Civic Ventures do more of? What would you recommend Civic Ventures offer Fellows with regard to communication, updates, and data on fellows?

### **Scalability and sustainability**

19. In your opinion, what would it take to make the Encore Fellowship scalable and sustainable?

*Probe:* Is there a relevant business model?

*Probe:* Who would pick up the cost of the stipend?

20. How critical to your participation was the \$25,000 stipend?

*Probe:* Is the current model relevant only to those who have other income sources and can accept \$25,000 as the rate?

21. In your opinion, what is the minimum stipend threshold the Encore model must offer to sufficiently provide a sense of the Encore Fellow's value and purpose?

*Probe:* If \$25,000 is not a feasible and replicable amount, what is?

22. In your opinion, to what extent is an Encore Fellowship a path that provides economic stability to people less well-off?

### **Final Reflections**

23. Do you have any additional comments for Civic Ventures or suggestions for improving the SVEF model, or anything else you'd like to share with us about your Encore Fellows experience?

**Thank you very much for your time!**

## Appendix B: Interview Protocol with Nonprofit Executives

Interviewee:
Nonprofit:
Interview Date:

### **Introduction**

Thank you for taking the time to provide your input and insight into Civic Ventures’ Encore Fellows idea and its pilot year. Civic Ventures engaged LFA Group to conduct these interviews in order to tell the story of the pilot year and to extract instructive lessons about the Silicon Valley Encore Fellows (SVEF) model – how it contributes to the social sector and to the creation of encore careers. Our evaluation aims to identify and highlight aspects of the SVEF pilot that resulted in successful matches between fellows and nonprofits; explore the experiences of fellows to understand the skill set required to successfully transition into the nonprofit world; explore the preparedness of nonprofits to engage fellows in meaningful work; examine the role that corporations can play in steering employees toward “encore” careers; and, investigate the scalability of the SVEF model. The product of our work will be an assessment report of the SVEF pilot year that aggregates interview findings and includes a section on scaling the model. Additionally, LFA will work with Civic Ventures to identify evaluation needs and opportunities as the SVEF model expands.

As you know, Civic Ventures has shared with us many of the documents and reports on the Encore Fellows activities. Members of the LFA team also attended the recently held retreat on expanding the model. These have provided our team with a substantial amount of background information to inform this conversation. The following questions aim to go deeper and focus more narrowly on your experience working with a Fellow, as well as your thoughts on the Encore model overall.

Please know that given the small circle of stakeholders, and Civic Venture’s desire for candid, direct input this interview is not confidential. We encourage you, however, to be as open and honest as possible. For this reason we are hoping that if there are things you feel are important to share, but wish to remain confidential, please let me know. We will handle this by compiling a confidential document of information provided by key informants about their experiences, or the idea overall. We will make anonymous any quotes to be shared with Civic Ventures in this fashion. The ultimate goal is that we provide Civic Ventures with the best, most complete set of findings. And, we hope this best supports your honest contributions to this assessment process.

We expect this interview to last about an hour and a half. Do you have any questions before we begin?

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### **Introductory/Background Questions**

1. Can you please introduce yourself and your role at [INSERT ORG NAME]?  
*Probe: In what ways did you interact with [FELLOW] during the past year?*

### **Matching Process**

2. Please share a little about how you made the selection to work with [FELLOW].  
*Probe: What aspects of [FELLOW] contributed to your decision to work with them?*  
*Probe: Are there things you wish you knew at the outset about this person in particular or the fellow program in general that you know now?*
3. What are elements that made for a good match?
4. What are elements that made for an imperfect match?

5. What are the elements that facilitated a successful on-boarding process? How could the on-boarding process been improved?
6. Can you talk a little about the projects that [FELLOW] engaged in at [INSERT ORG NAME]?
  - Probe: How did you engage [FELLOW] in meaningful work?*
  - Probe: What, in your opinion, are the elements of a high quality assignment?*
  - Probe: What challenges or barriers did you face in implementing your projects?*

### **Impacts on the Organization**

7. What are the main impacts you feel that [FELLOW] has had on [INSERT ORG NAME]?
  - Probe: What is true about [INSERT ORG NAME] today that was not true when you started as a Fellow?*
  - Probe: Can you talk a little about specific new tools, behaviors, or strategies that are now in place at the organization? Are there any new behaviors or practices you see among senior staff as a result of have a fellow at [INSERT ORGANIZATION]?*
8. Can you talk a little about the extent to which the impacts Encore Fellows generate are the result of hard skills or connections?
9. Were the work goals established during the onboarding process met?
10. Does [INSERT ORG NAME] have an action plan for continuing to implement or build upon the work that [FELLOW] has conducted?
  - Probe: Do you think the organization realistically has the capacity to carry this on?*
11. Nonprofits routinely receive capacity building grants to develop strategic plans, make technology enhancements, improve board functioning, develop marketing plans, etc. Do you feel like the \$25,000 investment in an Encore Fellow results in better outcomes than a \$25,000 capacity building grant?
  - Probe: In your experience, what nonprofit needs do you feel can be realistically addressed by Encore Fellows?*
12. How has your experience with an Encore Fellow affected your thinking about hiring individuals looking for an encore career?
13. How has participating in the SVEF pilot changed your attitudes towards sponsoring encore careers?

### **The Model**

14. Thinking about the SVEF model, what worked well? What do you recommend that Civic Ventures' carries forward into the next pilot year?
15. If you were attempting to replicate this model in another location, for example Durham, N.C., what elements of the model would you insist be included? Which elements of the model are unessential or didn't work?
  - Probe: Are there aspects of the model that lend themselves to regional modification?*
16. What value does Civic Ventures add to the model as an intermediary?
  - Probe: What has the relationship with Civic Ventures been like throughout the pilot year? What would you like to see Civic Ventures do more of? What would you recommend Civic Ventures offer nonprofits with regard to communication, updates, and data on fellows?*

**Scalability and sustainability**

17. In your opinion, what would it take to make the SVEF scalable and sustainable?

*Probe:* Is there a relevant business model?

*Probe:* Who would pick up the cost of the stipend?

**Final Reflections**

18. Do you have any additional comments for Civic Ventures or suggestions for improving the SVEF model, or anything else you'd like to share with us about your SVEF experience?

**Thank you very much for your time!**

## Appendix C: Interview Protocol with Civic Ventures Staff

Interviewee:
Organization:
Interview Date:

### Introduction

Thank you for taking the time to provide your input and insight into Civic Ventures' Encore Fellows idea and its pilot year. Civic Ventures engaged LFA Group to conduct these interviews in order to tell the story of the pilot year and to extract instructive lessons about the Silicon Valley Encore Fellows (SVEF) model – how it contributes to the social sector and to the creation of encore careers. Our evaluation aims to identify and highlight aspects of the SVEF pilot that resulted in successful matches between fellows and nonprofits; explore the experiences of fellows to understand the skill set required to successfully transition into the nonprofit world; explore the preparedness of nonprofits to engage fellows in meaningful work; examine the role that corporations can play in steering employees toward “encore” careers; and, investigate the scalability of the SVEF model. Products from LFA's evaluation will include a brief case study of each fellow/organization pair, and a full report that aggregates case study results to identify lessons for the field. The product of our work will be an assessment report of the SVEF pilot year that aggregates interview findings and includes a section on scaling the model. Additionally, LFA will work with Civic Ventures to identify evaluation needs and opportunities as the SVEF model expands.

Please know that given the small circle of stakeholders, and Civic Venture's desire for candid, direct input these interviews are not confidential. We encourage you, however, to be as open and honest as possible. For this reason we are hoping that if there are things you feel are important to share, but wish to remain confidential, please let me know. We will handle this by compiling a confidential document of information provided by key informants about their experiences, or the idea overall. We will make anonymous any quotes to be shared with Civic Ventures in this fashion. The ultimate goal is that we provide Civic Ventures with the best, most complete set of findings. And, we hope this best supports your honest contributions to this assessment process.

We expect this interview to last about an hour and a half. Do you have any questions before we begin?

### **Introductory/Background Questions**

1. Can you please tell me a little bit about your role with the Civic Venture's Encore Fellows program?  
*Probe:* At which point were you brought into the team to help turn this idea into a program?
2. Can you tell me a little bit about the origins of the idea?  
*Probe:* Was it always conceived of as an idea that would scale?

### **Impacts on the Organization**

3. Nonprofits routinely receive capacity building grants to develop strategic plans, make technology enhancements, improve board functioning, develop marketing plans, etc. Do you feel like the \$25,000 investment in an Encore Fellow results in better outcomes than a \$25,000 capacity building grant?  
*Probe:* In your experience, what nonprofit needs do you feel can be realistically addressed by Encore Fellows?
4. How has the Encore Fellows pilot impacted your thinking about avenues to address organizational capacity issues that vex nonprofits?
5. Is there a type and magnitude of impact an older executive-level business community member can have on a nonprofit that traditional capacity-building grants could not?

*Probe: Are there types of support and expertise that you envision nonprofits can most benefit from through an Encore Fellow?*

*Probe: Are there nonprofit challenges that the SVEF model cannot address?*

### **The Model**

6. Thinking about the SVEF model, what worked well?

*Probe: Are there aspects of the model that you would leave out of year two?*

*Probe: What was missing from the pilot year that you would like to see implemented going forward?*

7. If you were attempting to replicate this model in another location, for example Durham, N.C., what elements of the model would you insist be included? Which elements of the model are unessential or didn't work?

*Probe: Are there aspects of the model that lend themselves to regional modification?*

8. What value does Civic Ventures add to the model as an intermediary?

*Probe: How these roles and activities be transferred to other organizations?*

### **Scalability and Sustainability**

9. In your opinion, what would it take to make the SVEF scalable and sustainable?

*Probe: Is there a relevant business model?*

*Probe: Who would pick up the cost of the stipend?*

### **Final Reflections**

10. Do you have any additional comments or suggestions for improving the SVEF model, or anything else you'd like to share with us about your experience?

**Thank you very much for your time!**

## Appendix D: Interview Protocol with Corporate Sponsors

Interviewee:
Organization:
Interview Date:

### Introduction

Thank you for taking the time to provide your input and insight into Civic Ventures' Encore Fellows idea and its pilot year. Civic Ventures engaged LFA Group to conduct these interviews in order to tell the story of the pilot year and to extract instructive lessons about the Silicon Valley Encore Fellows (SVEF) model – how it contributes to the social sector and to the creation of encore careers. Our evaluation aims to identify and highlight aspects of the SVEF pilot that resulted in successful matches between fellows and nonprofits; explore the experiences of fellows to understand the skill set required to successfully transition into the nonprofit world; explore the preparedness of nonprofits to engage fellows in meaningful work; examine the role that corporations can play in steering employees toward “encore” careers; and, investigate the scalability of the SVEF model. Products from LFA's evaluation will include a brief case study of each fellow/organization pair, and a full report that aggregates case study results to identify lessons for the field. The product of our work will be an assessment report of the SVEF pilot year that aggregates interview findings and includes a section on scaling the model. Additionally, LFA will work with Civic Ventures to identify evaluation needs and opportunities as the SVEF model expands.

Please know that given the small circle of stakeholders, and Civic Venture's desire for candid, direct input these interviews are not confidential. We encourage you, however, to be as open and honest as possible. For this reason we are hoping that if there are things you feel are important to share, but wish to remain confidential, please let me know. We will handle this by compiling a confidential document of information provided by key informants about their experiences, or the idea overall. We will make anonymous any quotes to be shared with Civic Ventures in this fashion. The ultimate goal is that we provide Civic Ventures with the best, most complete set of findings. And, we hope this best supports your honest contributions to this assessment process.

We expect this interview to last about an hour and a half. Do you have any questions before we begin?

### Introductory/Background Questions

1. Can you please tell me a little bit about your role with the Civic Venture's Encore Fellows program?  
*Probe: At which point were you brought into the team to help turn this idea into a program?*
2. Can you tell me a little bit about the origins of the idea?  
*Probe: Was it always conceived of as an idea that would scale?*

### Impacts on the Organization

3. Nonprofits routinely receive capacity building grants to develop strategic plans, make technology enhancements, improve board functioning, develop marketing plans, etc. Do you feel like the \$25,000 investment in an Encore Fellow results in better outcomes than a \$25,000 capacity building grant?  
*Probe: In your experience, what nonprofit needs do you feel can be realistically addressed by Encore Fellows?*
4. How has the Encore Fellows pilot impacted your thinking about avenues to address organizational capacity issues that vex nonprofits?
5. Is there a type and magnitude of impact an older executive-level business community member can have on a nonprofit that traditional capacity-building grants could not?  
*Probe: Are there types of support and expertise that you envision nonprofits can most benefit from through an Encore Fellow?*

*Probe: Are there nonprofit challenges that the SVEF model cannot address?*

### **The Model**

6. Thinking about the SVEF model, what worked well?

*Probe: Are there aspects of the model that you would leave out of year two?*

*Probe: What was missing from the pilot year that you would like to see implemented going forward?*

7. If you were attempting to replicate this model in another location, for example Durham, N.C., what elements of the model would you insist be included? Which elements of the model are unessential or didn't work?

*Probe: Are there aspects of the model that lend themselves to regional modification?*

8. What value does Civic Ventures add to the model as an intermediary?

*Probe: How these roles and activities be transferred to other organizations?*

### **Scalability and Sustainability**

9. In your opinion, what would it take to make the SVEF scalable and sustainable?

*Probe: Is there a relevant business model?*

*Probe: Who would pick up the cost of the stipend?*

### **Final Reflections**

10. Do you have any additional comments or suggestions for improving the SVEF model, or anything else you'd like to share with us about your experience?

**Thank you very much for your time!**

## Appendix E: Interview Protocol with Philanthropic Sponsors

Interviewee:
Organization:
Interview Date:

### Introduction

Thank you for taking the time to provide your input and insight into Civic Ventures' Encore Fellows idea and its pilot year. Civic Ventures engaged LFA Group to conduct these interviews in order to tell the story of the pilot year and to extract instructive lessons about the fellowship model – how it contributes to the social sector and to the creation of encore careers. Our evaluation aims to identify and highlight aspects of the Silicon Valley Encore Fellows (SVEF) pilot that resulted in successful matches between fellows and nonprofits; explore the experiences of fellows to understand the skill set required to successfully transition into the nonprofit world; explore the preparedness of nonprofits to engage fellows in meaningful work; examine the role that corporations can play in steering employees toward “encore” careers; and, investigate the scalability of the SVEF model. The product of our work will be an assessment report of the SVEF pilot year that aggregates interview findings and includes a section on scaling the model. Additionally, LFA will work with Civic Ventures to identify evaluation needs and opportunities as the SVEF model expands.

Please know that given the small circle of stakeholders, and Civic Venture's desire for candid, direct input these interviews are not confidential. We encourage you, however, to be as open and honest as possible. For this reason we are hoping that if there are things you feel are important to share, but wish to remain confidential, please let me know. We will handle this by compiling a confidential document of information provided by key informants about their experiences, or the idea overall. We will make anonymous any quotes to be shared with Civic Ventures in this fashion. The ultimate goal is that we provide Civic Ventures with the best, most complete set of findings. And, we hope this best supports your honest contributions to this assessment process.

We expect this interview to last about 45 minutes to an hour. Do you have any questions before we begin?

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### Introductory/Background Questions

1. Can you please tell me a little bit about your connection to Civic Venture's Encore Fellows program?
2. How does the Encore Fellows idea intersect with your work?  
*Probe:* What is the foundations' interest in partnering to develop the model?

### Impacts on the Organization

3. Nonprofits routinely receive capacity building grants to develop strategic plans, make technology enhancements, improve board functioning, develop marketing plans, etc. How do you feel a \$25,000 investment in an Encore Fellow compares to a \$25,000 capacity building grant?  
*Probe:* Do you feel like it results in substantially better outcomes?  
*Probe:* In your experience, what nonprofit needs do you feel can be realistically addressed by Encore Fellows?

4. How has the Encore Fellows pilot impacted your thinking about avenues to address organizational capacity issues that vex nonprofits?
5. Is there a type and magnitude of impact an older executive-level business community member can have on a nonprofit that traditional capacity-building grants could not?  
*Probe: Are there types of support and expertise that you envision nonprofits can most benefit from through an Encore Fellow?*  
*Probe: Are there nonprofit challenges that the SVEF model cannot address?*

### **The Model**

6. Thinking about your knowledge of and experiences with the SVEF during the pilot year, what worked well?  
*Probe: What do you recommend that Civic Ventures' carries forward into the next year?*
7. If you were attempting to replicate this model in another location, for example Durham, N.C., what elements of the model would you insist be included? Which elements of the model are unessential or didn't work?  
*Probe: Are there aspects of the model that lend themselves to regional modification?*
8. What value does Civic Ventures add to the model as an intermediary?  
*Probe: What has the relationship with Civic Ventures been like throughout the pilot year? What would you like to see Civic Ventures do more of? What would you recommend Civic Ventures offer corporations with regard to communication, updates, and data on fellows?*

### **Scalability and Sustainability**

9. In your opinion, what would it take to make the SVEF scalable and sustainable?  
*Probe: Is there a relevant business model?*  
*Probe: Who would pick up the cost of the stipend?*
10. How does the SVEF model fit into your philanthropic strategies?  
*Probe: Is the economic investment of contributing to the Encore Fellows' stipend replicable?*
11. Would you only sponsor fellows and nonprofits in fields that relate your other philanthropic giving areas?  
*Probe: Do you think a fellow could fit well and produce similar results within the confines of a foundation? Other type of organization?*

### **Final Reflections**

12. Do you have any additional comments for Civic Ventures or suggestions for improving the SVEF model, or anything else you'd like to share with us about your Encore Fellows experience?

**Thank you very much for your time!**

## Appendix F: Survey with Encore Fellows

Thank you for taking the time to complete this important survey to help Civic Ventures learn from and scale the Silicon Valley Encore Fellows (SVEF) model. Civic Ventures has contracted with the independent research and evaluation firm, LFA Group, to evaluate the SVEF pilot. The purpose of this survey is to explore your experiences during the SVEF pilot year and to extract instructive lessons about the SVEF model – how it contributes to the social sector and supports transitions of older adults into encore careers.

Your opinion is extremely important. Please take 10-15 minutes today to help Civic Ventures better understand your experiences with the SVEF pilot.

This survey is confidential and your individual responses will not be shared with anyone. If you have any questions, please contact Samantha Chen of LFA Group at [Samantha@LFAgroup.com](mailto:Samantha@LFAgroup.com) or (415) 392-2850 x317.

Thank you for your participation!

	Very unsatisfied	Unsatisfied	Satisfied	Very satisfied
1. How satisfied are you with the overall Encore Fellowship experience?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

How satisfied are you with the following aspects of the Encore Fellowship experience?	Very unsatisfied	Unsatisfied	Satisfied	Very satisfied
2. The matching and selection process.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. The on-boarding process [orientation to the organization and project(s)].	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. The engagement (the time that you spent at a nonprofit).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. The role of Civic Ventures as the intermediary.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6. Thinking about the future of the Encore Fellows program, what are the top two roles that you would like Civic Ventures to continue to play?

Please tell us about how (if at all) your thinking has changed since participating in the Encore Fellowship.	Unlikely	Somewhat likely	Likely	Very likely
7. <i>Before</i> participating in the Encore Fellowship, how likely were you to pursue a career in the nonprofit sector?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. <i>Now</i> , having been an Encore Fellow, how likely are you to pursue a career in the nonprofit sector?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

9. Please briefly explain *how* your thinking around pursuing a career in the nonprofit sector has changed since participating in the Encore Fellowship.

Please tell us about how (if at all) your thinking has changed since participating in the Encore Fellowship.	Not prepared	Somewhat prepared	Prepared	Very prepared
10. <i>Before</i> participating in the Encore Fellowship, how prepared did you feel to transition into a career in the nonprofit sector?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. <i>Now</i> , having been an Encore Fellow, how prepared do you feel to transition into a career in the nonprofit sector?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

12. Please briefly explain how participating in the Encore Fellowship has or has not helped prepare you to transition into a career in the nonprofit sector.

13. Did your nonprofit offer you a job after participating in the Encore Fellowship?  Yes  No

14. Did you accept the job offer from the nonprofit?  Yes  No

15. If you did not accept the job, please briefly explain why.

16. Do you have any suggestions for improving the Encore Fellowship model?

17. Do you have any additional comments for Civic Ventures or anything else you'd like to share with us about your Encore Fellows experience?

*Thank you for your participation!*

## Appendix G: Survey with Nonprofit Executives

Thank you for taking the time to complete this important survey to help Civic Ventures learn from and scale the Silicon Valley Encore Fellows (SVEF) model. Civic Ventures has contracted with the independent research and evaluation firm, LFA Group, to evaluate the SVEF pilot. The purpose of this survey is to explore your experiences during the pilot year and to extract instructive lessons about the SVEF model – how it contributes to the social sector and supports transitions of older adults into encore careers.

Your opinion is extremely important. Please take 10-15 minutes today to help Civic Ventures better understand your experiences with the SVEF pilot.

This survey is confidential and your individual responses will not be shared with anyone. If you have any questions, please contact Samantha Chen of LFA Group at [Samantha@LFAgroup.com](mailto:Samantha@LFAgroup.com) or (415) 392-2850 x317.

Thank you for your participation!

	Very unsatisfied	Unsatisfied	Satisfied	Very satisfied
1. How satisfied are you with the overall Encore Fellowship experience?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

How satisfied are you with the following aspects of the Encore Fellowship experience?	Very unsatisfied	Unsatisfied	Satisfied	Very satisfied
2. The matching and selection process.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. The on-boarding process [orienting the fellow and deciding on a project(s)].	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. The engagement (the time that the Fellow spent at your nonprofit).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. The role of Civic Ventures as the intermediary.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6. Thinking about the future of the Encore Fellows program, what are the top two roles that you would like Civic Ventures to continue to play?

Please tell us about how (if at all) your thinking has changed since working with an Encore Fellow.	Unlikely	Somewhat likely	Likely	Very likely
7. <i>Before</i> having an Encore Fellow at your organization, how likely were you to hire a former corporate executive (with no nonprofit work experience)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. <i>Now</i> , having had an Encore Fellow at your organization, how likely are you to hire a former corporate executive (with no nonprofit work experience)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. How likely are you to hire a former corporate executive who completed an	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Encore Fellowship?				
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10. Did you offer your Encore Fellow a job at your organization?  Yes  No

11. Please briefly explain *how* participating in the Encore Fellowship has changed your thinking around hiring a former corporate executive.

<b>Please tell us your level of agreement with the following statements about the effect of the Encore Fellow's engagement on organizational capacity.</b>	<b>Strongly disagree</b>	<b>Disagree</b>	<b>Agree</b>	<b>Strongly agree</b>
12. We have new and useful <u>tools</u> in place at my nonprofit that are a direct result of the Encore Fellow's engagement.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. We have new and useful <u>approaches</u> to our work that are a direct result of the Encore Fellow's engagement.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Staff have been developed in new ways that directly result from the Encore Fellow's engagement.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

15. Please briefly explain how the Encore Fellow did or did not contribute to your organization's capacity.

<b>Please tell us your level of agreement with the following statement about the value of the Encore Fellow's engagement on organizational capacity.</b>	<b>Strongly disagree</b>	<b>Disagree</b>	<b>Agree</b>	<b>Strongly agree</b>
16. An Encore Fellow is more valuable than a \$25,000 capacity-building grant.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

17. Knowing what you know now about how your Encore Fellow performed, what annual, full-time salary would accurately reflect the value that your Fellow added to your organization? \_\_\_\_\_

18. Do you have any suggestions for improving the Encore Fellowship model?

19. Do you have any additional comments for Civic Ventures or anything else you'd like to share with us about your Encore Fellows experience?

*Thank you for your participation!*