

# THE NATIONAL CONFERENCE of



## BOSTON 2014





# Welcome!

## **Dear ReServe National Conference Attendees:**

We are pleased to welcome you to our ReServe National Conference in the historic city of Boston. We hope you take the time following the gathering to enjoy the sights!

Over the next 16 years, 10,000 Baby Boomers will turn 65 every single day. This vibrant, educated and energetic generation is interested in finding meaningful ways to spend the next stage of their lives.

Because of the foresight of founders Jack Rosenthal, Herb Sturz and Michael Weinstein, ReServe has provided over 3300+ unique and profound experiences for older individuals throughout New York City, Miami, Southeast Wisconsin, Newark, Baltimore, Westchester County NY and Boston.

As we enter the 10th year of ReServe, we are thrilled at how far we have come, and we are very optimistic about our future. We anticipate that our time together during this conference will be extremely fruitful. We have arranged for an array of panelists and speakers on topics intended to educate, inspire and expand our thinking. We have also built in time for networking—one of the most important benefits of conferences such as these.

We are grateful for the hard work of Jay Martin, ReServe Board Member, Laura Traynor, Noelle Minton and Betsy Conrad of the ReServe New York team, Carol Greenfield of Greater Boston ReServe, the Fedcap Communications Team including Dave Biederman, James Cook and Sue Sawyer, and Serena Powell and Andrea Mitsch of Community Work Services. Without their efforts this conference would not have been possible.

**Sincerely,**

**Deborah Sale**

**Chair, National ReServe Board of Directors**



# National Conference of



a division of **FEDCAP**

## AGENDA AT A GLANCE

### Monday, July 21st

- 3:00-5:00** Pre-Conference Workshop
- 6:00-8:00** Welcoming Reception at Community Work Services

### Tuesday, July 22nd

- 8:30-9:00** Breakfast and Networking
- 9:00-9:15** Welcoming Remarks: Christine McMahon and Michael Weinstein
- 9:15-9:45** Keynote Address: Ursula Staudinger, PhD, Director, Columbia Aging Center
- 9:45-10:30** Panel of ReServists
- 10:30-11:30** Path to Financial Stability: Christine McMahon, Fedcap CEO
- 11:30-12:00** Structured Networking
- 12:00-1:00** Lunch, Luncheon Speaker: Ann Machado, President Creative Staffing Solutions and ReServe Miami Advisory Board Member
- 1:00-1:45** ReServe Affiliate Panel Discussion
- 1:45-2:45** Breakout Session #1: Building Sustainable Partnerships: Government & Libraries  
Breakout Session #2: Intergenerational Work at Its Best
- 2:45-3:15** **Wrap Up and Next Steps**

# ReServe's Rich History and Exciting Future

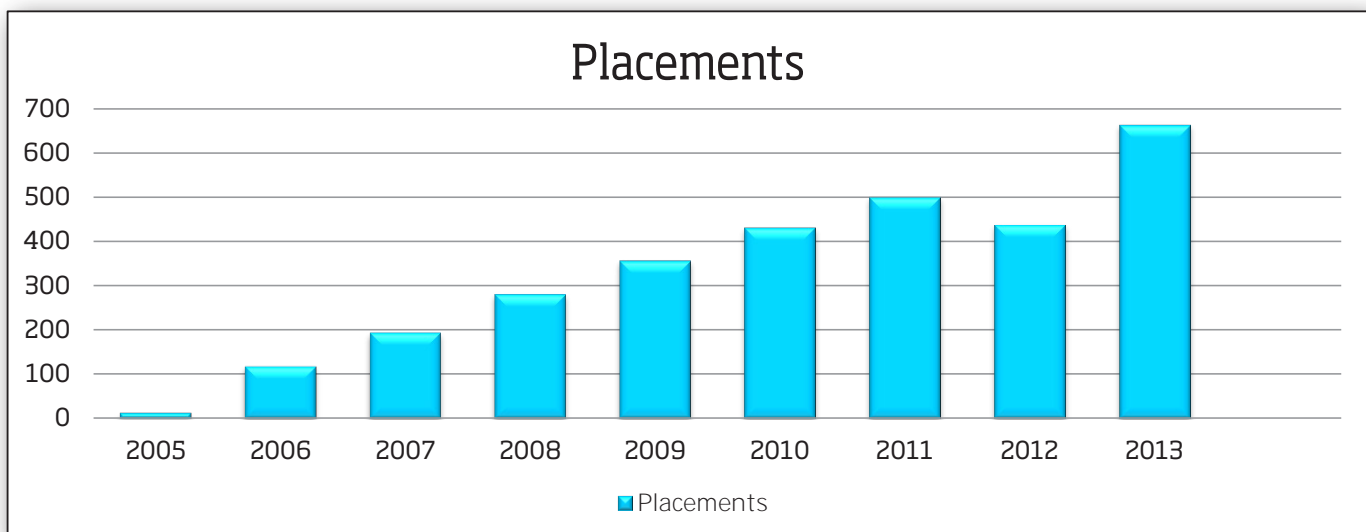
**ReServe** was founded in 2005 by three social entrepreneurs– Jack Rosenthal, Herb Sturz and Michael Weinstein. These visionaries saw the tremendous potential of leveraging the skills and talents of older adults who wanted to put their experience to work for the greater good once their primary careers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

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



## EXPANSION ACROSS THE COUNTRY

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





## THE EVOLUTION OF SOCIAL IMPACT AREAS

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

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

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

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

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

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

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

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

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

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

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

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

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



## THE FUTURE OF RESERVE IS BRIGHT.

### **Our Strategic Plan positions ReServe for significant advancement over the next decade including:**

- An expanded national and international footprint
- A thriving National ReServe headquarters
- A continuously growing number of ReServists with wide-ranging skills and experiences
- A diverse and committed array of community partners and funders
- An increasing number of dynamic, visible Advisory Councils leveraging their relationships to benefit ReServe
- A range of social impact initiatives with data to tell the story of how ReServists made significant impact in people’s lives and the communities in which they live



# About Our Speakers

(alphabetical order)



**ANN MACHADO** is Founder and President of Creative Staffing, a Miami-based firm that made the Inc. 500 list of the fastest-growing privately-held U.S. companies. The firm was selected by Nation's Business and the U.S. Chamber of Commerce as a statewide winner in the 1994 Blue Chip Enterprise Initiative, which honors companies that overcome challenges to achieve success.

Since launching Creative Staffing in 1985 with a single employee, Machado has turned it into a leader in the temporary and direct-hire staffing industry by providing superior customer service, adopting innovative practices and giving back to the community. She is the past chair of St. Thomas University, the Komen Foundation, United Way, Women's Fund and the Florida Staffing Association. In 2011, Ms. Machado launched ReServe Miami, where she continues to serve as Co-Chair of its Advisory Board and as a consultant to Fedcap.

Ms. Machado has won numerous awards for business acumen, philanthropy and leadership within the staffing industry and the greater Miami community. In 2010, she was named "Woman Extraordinaire" by Business Leader Magazine.



**CHRISTINE MCMAHON** joined Fedcap in 2009 as President and Chief Executive Officer, and has championed the organization's strategic growth, significantly increasing the size of the agency as well as its service delivery capabilities and geographic footprint.

Ms. McMahon has more than 30 years' experience in design and implementation of social and mental-health services in New York and New England. She is nationally recognized for the breadth of her strategic vision and her expertise across a wide range of social programs, for the implementation of numerous social-service-delivery and community-based initiatives, and for influencing state and local healthcare and social policy. She previously served as Senior Vice President and COO of the Easter Seals Northeast region.

Ms. McMahon received her Master of Health Administration from the University of New Hampshire and her BA in Psychology from New England College. Her numerous honors include the New Hampshire Business Review - Outstanding Women in Business Award, the National Easter Seals - Lou Lowenkron Award for Program Innovation, the Division for Children, Youth and Families - Director's Choice Award, and the Riverbend Community Mental Health - Rainbow Award.





**DEBORAH SALE**, Chair of ReServe's Board of Directors, was most recently the Executive Vice President for External Affairs of New York's Hospital for Special Surgery, an affiliate of Weill/Cornell Medical College specializing in orthopedics and rheumatology and recognized as the leader in its fields nationwide. Ms. Sale previously served as Chief of Staff to New York State Lieutenant Governor Stan Lundine. Ms. Sale was Executive Director of the Federal Council on the Arts and the Humanities in the Carter White House, a Special Assistant to Vice President Walter F. Mondale and an executive with Columbia Pictures. She served on the staff of both the Carter/Mondale and Clinton/Gore campaigns.

Ms. Sale chairs the board of Public Health Solutions, is vice president of the board of the Community Service Society of New York and is a member of the boards of New York Live Arts and The Yard. She was a founding board member of Eleanor's Legacy. Ms. Sale and her husband Ted Striggles live on the Upper West Side of Manhattan.



**JACK ROSENTHAL** is Founding Chairman, ReServe, Interim Director, Roosevelt Public Policy Institute at Hunter College and President of The New York Times Company Foundation, a position he assumed in 2000 after four decades as a distinguished reporter, editor and executive at The New York Times. In 1982, he won the Pulitzer Prize for editorial writing. At the Foundation, he directs all the newspaper's philanthropic activities which include administering The Neediest Cases Fund, the College Scholarship Program and 350 grants each year to nonprofit organizations serving New York, Boston and other communities in which The Times does business.



**URSULA M. STAUDINGER, PhD**, a lifespan psychologist and an internationally recognized researcher on aging, joined the Mailman School in July 2013 as Founding Director of the new Robert N. Butler Columbia Aging Center. The Center is a global hub for interdisciplinary aging research and knowledge transfer to policy makers, companies, as well as the general public. Dr. Staudinger also leads the renowned International Longevity Center (ILC) USA, part of the fourteen-member, multinational ILC - Global Alliance consortium that seeks to help societies address longevity and population aging in positive and productive ways.

Dr. Staudinger was previously the Vice President of Jacobs University Bremen in Germany and Founding Dean of the school's Jacobs Center on Lifelong Learning and Institutional Development, a research center investigating productive aging. Previously, she was Professor of Developmental Psychology at the Technical University Dresden and Senior Scientist of the Max Planck Institute of Human Development in Berlin, Germany. Dr. Staudinger's research focuses on the opportunities and challenges of increases in average life expectancy. She investigates the potentials of aging by studying the plasticity of the aging process (e.g. cognition or personality), as well the development of life insight, life management, and wisdom over the life span.

## PANEL OF RESERVISTS

Virginia Aponte, Impact Achievement/ Reserve Miami Program Manager

Deborah Golden, Development Executive - GRLZradio.org

Bill Newlin, Project Coordinator, PrepNOW!

## PANEL OF RESERVE DIRECTORS

Carol Greenfield, Director, ReServe Greater Boston

Branden McCleod, Director, ReServe Maryland

Dacia Steiner, Director, ReServe Miami

Kevin Donahue, Director, ReServe Newark

## BUILDING SUSTAINABLE PARTNERSHIPS: GOVERNMENT CONTRACTS

Jack Rosenthal, Founding Chairman, ReServe;

Interim Director, Roosevelt Public Policy Institute at Hunter College

Noelle Minter, Assistant Director, ReServe

## BUILDING SUSTAINABLE PARTNERSHIPS: LIBRARIES

Maureen O'Connor, Senior Advisor for Education and Workforce Development, Queens Library

Betsy Conrad, Assistant Director, ReServe

## INTERGENERATIONAL WORK AT ITS BEST

Blake Heller, Project Manager, the Education Innovation Laboratory at Harvard University

Dr. Roque Gerald, Senior Vice President, Education Practice Area, Fedcap

Dacia Steiner, Director, ReServe Miami

# ReServists Making an Impact

## **RESERVE WESTCHESTER: MIKE ISERSON**

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

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

## **RESERVE MARYLAND: HOWARD ZUCKERMAN**

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

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

## **RESERVE GREATER BOSTON: DEBI GOLDEN**

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

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

## **RESERVE NEWARK: MARGO GREENFIELD**

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

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

## **RESERVE MIAMI: DORETHA NICHSON**

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

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

## **RESERVE NEW YORK: MARY SHEA**

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

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

## **RESERVE SOUTHEAST WISCONSIN: SIG TOMKALSKI AND MIKE STAFFORD**

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

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

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Bart Mondell  
Program Coordinator

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