CAREER THOUGHT LEADERS

Special Report

Strategies for the 60+ Job Seeker

Enhancing Career Services for Career Persisters & Encore Careerists

Based on Trends from Career Jam 2016

Career Thought Leaders Consortium
Editors: Jan Melnik, Ruth Winden & Marie Zimenoff
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SUMMARY

For the past seven years, Career Thought Leaders has convened careers industry professionals from around the world to brainstorm best practices, innovations, trends, new programs, new processes, and other observations that are currently impacting or projected to impact global employment, job search, and career management.

This year, we have taken the top trends from the annual event – Career Jam: Where Experts Forecast The New & The Next – and deepened the conversation by gathering tips from leaders in the career field. These compiled tips and resources come together to create a practical guide for career professionals working with special populations or handling career challenges trending in today's workplace.

The first of these guides shares tips for working with job seekers aged 60+ – a growing contingent in the workforce. It includes coaching and writing strategies for career professionals to help this audience to achieve their career goals, overcome obstacles they may face because of their age, promote their strengths, and market themselves in a "what have you done for me lately" society.

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Strategies for the 60+ Job Seeker

Enhancing Career Services for Career Persisters & Encore Careerists

In the 1990s, retirement in one's mid-fifties was widely regarded as the holy grail of career success. Adorned with the cherished gold watch for having climbed the corporate ladder and backed by a generous company pension, the prospect of enjoying a care-free decade or two, travelling and playing golf, seemed most appealing.

Fast forward to today, and how things have changed. The prospect of withdrawing completely from the world of work at such a young age feels preposterous, wasteful, and utterly unbelievable.

What has changed?

1. Greater Longevity: We live longer, healthier, and more active lives. In the U.S., it is estimated that one in five Americans will be age 65 or older by 2030, and nearly double to 83.7 million by 2050 (The Milken Institute, 2017). The same goes for many western countries. In reasonable health and expecting to live to your 80s, 90s, and even 100s, as many are, stopping work at 55 has lost its attraction. What will you do with your life for the next 25, 35, or even 45 years? If you are living this long (a wonderful thing), you may need to work a decade or longer than 55 to set aside enough funds.

2. Default Retirement Age Phase-Out: The legal retirement age, prescribing the end of one's working life at a common age, was abolished in the UK in 2011 and the US decades ago. As no one can force you to retire at the traditional retirement age, more and more of us seek to extend our working lives by choice or out of necessity.

3. Pension, Social Security, and Healthcare Age Increase: Governments worldwide struggle to fulfill state pension and social security obligations for a growing older population. As a result, the state pension age is being equalized for men and women, and increasingly pushed upwards.

4. Retirement Deficits: The fallout of the 2008/2009 global financial crisis is still painfully clear to many professionals aged 60+. In addition, Baby Boomers are notorious for overestimating their pension and retirement funds and underestimating their financial needs for a "comfortable retirement." They need to review their financial futures and find ways to raise income to finance retirement dreams. Working longer is a simple way to address any financial gaps and top up retirement pots.

5. Growing Interest in Working Longer – On Our Terms: A consequence of an ageing population is a greater need for individuals to provide care for loved ones. Depending on personal circumstances, this can be for spouses, ailing parents, grandchildren, or the wider family. Therefore, working professionals aged 60+ need greater flexibility at work to fulfill their family responsibilities at home. And employers are slow to catch onto this trend, with some notable exceptions of forward-thinking organizations in the finance, banking, and consulting world (Business in the Community, 2016).

   In the UK alone, 1 million people age 50 or older *want to work* but cannot find appropriate employment opportunities that allow them to fulfil their caring commitments. Helping the so called "Missing Million" back into employment is high on the UK political agenda – for reasons of fairness, inclusion, diversity and the many mental health benefits that working brings. The economic benefits of having more people in this age group in work are staggering, too: If the UK had the same employment rates as Sweden, £ 14 Billion GDP would be added to the British economy every year (Business in The Community, 2015).

6. Choosing Between Retirement and Unretirement: All these factors contribute to a greater demand for *meaningful* employment in later life. But the difference is that through legal, societal, and technological changes, those who want to keep contributing to the work place have more choices to do so than ever before. New technologies enable us to work as long, as intensely, and at a location of our choice, provided we bring the right expertise, skills, and attitude to make a living that way. Of course, not every 65-year-old reaching traditional retirement age will want to keep working. A recent article series on the new face of retirement in Britain by senior journalist Amelia Hill in The Guardian showed a clear division in British society between those who are eager to keep working and those who feel spent after a long, hard working life and regard the government push to work longer as a conspiracy by the ruling classes.

Definitions and Approach

This Career Thought Leader white paper focuses on helping those ages 60+ to welcome the changed perceptions and realities of retirement, recognizing that the majority do not see their age as a reason to withdraw from the labor market. It arms careers industry professionals with tools to help this audience embrace the new phenomenon of "Unretirement," "Encore Careers," or "Second Acts" with courage and determination.

The term "Unretirement" was coined by Chris Farrell, whose book "Unretirement: How Baby Boomers are Changing the Way We Think about Work, Community and The Good Life" (2014) describes the seismic shift in the US towards the need for more fulfilling, engaged, and economically viable ways to contribute to society in later life. Unretirement envisions the exact opposite of retiring, in its original sense of the French verb 'retirer' - withdrawing from public life. Unretirement is about creating meaningful ways of contributing, whether that is through employment, entrepreneurship, or community service.

Upon exploring the macro trends careers industry leaders brought forth during the 2016 Career Jam hosted by Career Thought Leaders, two primary audiences emerged within the 60+ career-seeking population: Career Persisters and Encore Careerists. This paper defines these audiences as follows:

Career Persisters did not retire (or are not retiring) at age 62, 65, or anytime in the foreseeable future. For a wide range of possible reasons, they are choosing or forced to work beyond the classic age of retirement. Perhaps they are raising grandkids or supporting kids or elder parents, lack sufficient savings to retire in the conventional sense, suffer from poor investment returns, love their work or love to work, or want to keep making a contribution or difference and be compensated. They are seeking to make a move or land a job in which there is a good salary and, for many, a strong healthcare benefits package. They seek to overcome ageism and discrimination and compete effectively by tapping their expertise and proven record of contributions and success.

Encore Careerists might have retired at 62 (possibly earlier for those with good pensions, military/civil service, or other early opportunities), traveled a little or a lot, experienced a life-changing event (loss of spouse or significant other), have an excess of free time, are ready to retool (but perhaps working fewer hours than they worked prior to this stage in life), and want to do "something" beyond volunteering. They want to be valued for their expertise and contributions, would like to "make a little money," and feel energized to pursue meaningful work of some sort, on a part- or full-time basis. Often, their desire is to do something different, try something they always wished they had the chance to do, or pursue something that isn't stressful and maybe even fun.

Within the sections that follow, we'll unpack some of the best strategies well-respected coaches and writers of career collateral (resumes, cover letters, LinkedIn profiles, and more) are using with this population.

General Strategies for Coaching the 60+ Audience

As career coaches, we know that there are many commonalities to the work we do with all clients, regardless of age and quest. The job search strategy must complement an individual's style and direction and align with what a potential employer is seeking. The interview coaching must solidify for the client what he or she uniquely can deliver, with energy and honesty.

Here are some general considerations for career coaches in the realm of unretirement working with Career Persisters and Encore Careerists:

- Baby Boomers, mid-lifers, seniors – there are many labels one can attach to people in this age group. Are these labels helpful? Baby Boomers are often depicted as a homogenous group, all with the same needs. Yet in reality, every person in that category is an individual, with unique life stories, perspectives, careers, attributes, aspirations, and challenges. Be wary of stereotypes and check your assumptions.

- As a coach, what is your (unconscious) bias regarding working in later life? As career coaches, we have our own ideas and ideals for our careers at the age of 60+. How much of our own longings and aspirations do we subconsciously bring to the coaching process? To remain neutral, open, and curious about our clients' ideas and preferences, we must keep our own beliefs in check. If you feel your own thoughts are getting in the way, consider answering these questions for yourself:
    - How do you regard the idea of retirement, semi-retirement, or unretirement? Do you favor any of these options, and if so, why?
    - What does a fulfilled and meaningful later life look like for you? Does a later working life have to be fulfilled and meaningful?
    - Are you expecting people aged 60+ to slow down, remain at the same performance level, or step up their careers? What about at the age of 70? Age 80?
    - How would you work with a client who decides to stop working, for good, and who rejects the notion of 'unretirement'?

  Being aware of our preferences, beliefs, and convictions is paramount for being a successful coach with any client. Spend time exploring your own values about unretirement before coaching others.

- However eager clients are to move forward with their careers, encourage them to take stock first, with a detailed career review. Questions like these will uncover important insights:
    - What have been your career highlights and what made them so?
    - What have been your low points and what made them so?
    - What do you want to keep doing, stop doing, or start doing in your professional lives?
    - What have you always wanted to do, but never had the time, opportunity, or knowledge to do?
    - If we met again in 10 years, what will you be delighted to tell me about your career and life?

  Reviewing your clients' careers before jumping into planning their unretirement can lead to more satisfying and appropriate solutions, as it allows clients to address and rectify any legacy issues – if they are still important to them.

- Be prepared for questions to do with leaving a legacy. Clients in this age group are conscious that time is precious and limited to achieve (great) things in their lives. This awareness gives life a distinctly different quality, now that there is not all the time in the world to make mistakes and navigate the ups and downs of careers. This sense of urgency can bring focus, alertness, and energy to coaching conversations. It can equally bring impatience, frustration, and despondency, as clients realize that time is of the essence, resources might be limited, and maybe not all their aspirations are attainable after all. Step into your brilliance as a coach to address these burning issues. Alternatively, consider partnering with a life coach if these challenges are beyond your expertise or interest, so you can focus on the career coaching pieces.
- Age discrimination is still rampant. Many employers and industries still (secretly) prefer younger

candidates and will find ways to discriminate without making it blatantly obvious to avoid law suits. If your client is unsuccessful in their job search, work with them on their employer target list to identify employers with a reputation for welcoming employees at all ages. In the UK, companies like Barclays, B&Q, Aviva, EY, Walgreens Boots Alliance, the Co-op, and the Royal Air Force are setting new standards in accommodating and attracting candidates aged 55+ (Business in The Community, 2016). Widen your search to industries, companies, and roles where life experience and age are an asset. A growing older population brings career opportunities where the perspective and experience of an older worker is essential – think pensions and investments, elder and social care, policy makers, and any roles that center around advising, mentoring, teaching, organizing, marketing, or selling to older consumers. In short, look for opportunities where your client's age is a distinct advantage.

- Talk openly with your client about age bias. Why might employers have fear of hiring an older worker? Exploring these perceived biases together can provide the older job seeker with strategies to ensure they do not play into these fears. For instance, employers may fear that an older worker will not be quick with the technology required to do the job. The older job seeker can demonstrate their grasp of technology through engagement on professional social media, like LinkedIn, through a modern resume, and many other ways when they are conscious of this possible bias. Help them be careful of adopting "us versus them" language or repeating stereotypes they hear or read about Millennials. Marsha Toy Engstrom reminds clients to avoid jumping to conclusions about age discrimination – job search is a long process for all job seekers. Patience and persistence will win.

- Engstrom also emphasizes that mindset is the most important factor in a successful job search: "attitude tops ability." This is especially important for older candidates because, as Marsha points out, they have "had additional time to collect extra baggage." Articulating their own fears and biases is an important step in assessing a client's current mindset and actively adjusting attitude so negativity does not seep out during a networking meeting or interview. Help them consciously plan to "exude energy and excitement." She further suggests they consider why they are excited about this role, this company and show their passion about specifically what they are eager to accomplish for them.

- Proactively addressing hiring manager's age-related concerns is a strategy Laurie Berenson favors: "One counter argument to your age is that you are a viable candidate and a cost-effective, long-term hire for a mid-level role because you are no longer looking to rise through the ranks. You are satisfied with remaining in a mid-level role and do not pose the same flight risk as does a younger candidate." As someone with longer-term commitment, "say you're looking for a meaningful way to spend your time and energy." Ensure your client comes across as someone who "still has something of value to contribute and/or give back, and that you feel strongly about staying active." An additional plus is the ability of a Career Persister or an Encore Careerist to relate to and communicate well with a growing part of the population – those aged 60+.

- Wende Gaikema recommends evaluating each of the eight major areas of life: work, money, physical surroundings, recreation, health, spiritual, family and friends, and personal growth. Coaches can help clients keep goals for each of these areas of life in mind as they make career decisions.

Planning an unretirement career takes energy, focus, and careful planning. For Nancy Collamer, not leaving the career planning stage until retirement is a key success factor. Although "the majority of Baby Boomers would like to work in retirement, most don't focus on planning their second acts until after they retire. They are simply too busy juggling the demands of their busy present day lives. But if you want to maximize your options for the future, it's important to plan ahead."

Collamer recommends "three very simple (and fun!) things you can do to get the process rolling – even while you're still working full time."

1. Set-up a Running File of Second-Act Career Ideas. No matter how many years you have until retirement, chances are you have at least a few thoughts on what you'd like to do in the second half of life. Perhaps you're considering work as a consultant, starting business with a colleague, or finding a position with a nonprofit. Whatever your "someday dreams," it is helpful to capture them in writing. Start a file of second-act possibilities today. It really doesn't matter if you capture your ideas in a journal, on the computer or in a pretty notebook, so long as you collect them in one place. Over time, you will build a collection of resources and ideas that will help lead you into your next act.

2. Surround Yourself with Second-Act Inspiration. One of the best ways to expand your sense of what's possible is to learn from other second-act career reinvention stories. We all enjoy a good story and there is almost always a valuable tip, resource or lesson that can be valuable to your situation. Fortunately, there is a growing collection of inspirational second-act stories on the web. A few of my personal favorites include NextAvenue.org (PBS site for people over 50), Encore.org (nonprofit options), and a list of 100+ Great Second-Act Career Resources at MyLifestyleCareer.com.

3. Throw a Second-Act Brainstorming Party. By the time you hit middle age, you have a wide network of associates who can provide interesting ideas, perspectives, and experiences that might be useful in planning your second act. To host a brainstorming party, invite a group of six to eight friends over for a casual brunch or dinner. Be sure to include people who are supportive personalities and/or creative thinkers (no Debby Doubters or Doug Downers welcome). Throw out a few questions to focus the discussion and then let the conversation flow. Allow people to speak freely and avoid the temptation to critique ideas as they get shared. Make it easy for people to help you by asking for specific information and resources – the clearer you are, the greater the odds your friends will be able to help you in concrete and meaningful ways.

General Career Collateral Strategies for the 60+ Audience

Similar to career coaching strategies for this audience, many best practices for writing career collateral – whether it is a resume, cover letter, LinkedIn profile, or any other written material a candidate is sharing with a hiring manager – transcend age. A resume must resonate with authenticity, it must tell *the right story* for that client's purpose, and it must present proof of performance in a way that differentiates and positions for success with the next employer.

Common to both groups with respect to writing career collateral are the following tips from expert writers who work with Career Persisters and Encore Careerists.

- Debra O'Reilly emphasizes the importance of studying and understanding the needs of the target employer – and then contextualizing a candidate's expertise and experience using the lingo of the target employer. She further recommends sharing only the essentials – knowing whether to truncate (or eliminate altogether) the first 15, 20, or more years of a career to create a concise document that a busy hiring manager can quickly peruse to assess possible fit.

- O'Reilly also suggests the following to 60+ job seekers: Find out WHO your audience really is. Find out WHAT needs to be accomplished to reach the audience's goals. Find out WHY the position is open. Find out WHERE you can provide the greatest value. Find out HOW to present your information to demonstrate your fit for the job and create next steps in the hiring process.

Coaching Strategies for Career Persisters

Career Persisters seek to balance their desire for work that is meaningful and suits their desired lifestyle with the need to earn a salary that equals or exceeds that they have earned throughout their career. Depending on the circumstances surrounding the decision to continue working, Career Persisters may need to unpack their vision of retirement – traveling the world, focusing on a favorite hobby without financial worries, or relaxing and enjoying life – visions that may have been unrealistic for many reasons. What will their new vision of these years be?

- In considering career change, first evaluate what is not working in the Career Persister's current position/industry. Evaluate daily activities or job tasks to determine those that are enjoyable and those that deflate their energy. Evaluate the work environment and culture for aspects they enjoy and those that they would like to avoid in future positions. What is missing? What do they want more of in their next job? What tasks would they like to be less prominent in their next job? What environmental or cultural factors would they like to avoid?

- Career Persisters want to build on their experience to maintain salary level. Help direct their career change and job search by taking stock of this experience. Although assessments of interest and personality can be part of the career exploration and decision-making process for this audience, the debrief with the client will focus more on how they can leverage their experience to take steps toward suggested career options. Formal assessments that present career options and potential job titles, such as the Strong Interest Inventory, are less effective with this audience. Tools like the StrengthsFinder 2.0 and 360Reach personal branding assessment can be helpful to gain language around existing strengths that can combine with experience to set a new direction.

- During the job search, emphasize relevant accomplishments – in the role and/or industry – to demonstrate value to potential employers. Instead of focusing on years of experience, build stories that speak to recent, relevant accomplishments. Their experience is an asset in the quest to continue their career, and employers will want specific examples that relate to the future position. These examples will be an important foundation as they network and prepare for interviews.

- Promote the strengths of the generation. Marsha Toy highlights the strengths of the 60+ generation to include communication, focus on achievement, self-reliance, team orientation, and loyalty. Help clients craft specific stories that demonstrate how it is true for that client and use a tone that avoids inferring other generations are not (loyal, achievers). Putting down other generations in the process of promoting your strengths is likely to backfire.

- "Say yes to learning," recommends Debra Ann Matthews. This can be in the form of free online courses, volunteer opportunities, or paid "gigs." Contract work and "side-hustle" work opportunities are the new normal. They might not fit the entirety of a job seeker's need for salary and benefits, but not being open to such opportunities can significantly limit success. These options can support steps toward a new career direction while maintaining a current position, provide income during job search, or become the equivalent of full-time work if negotiated to provide sufficient salary.

Career Collateral Strategies for Career Persisters

Resumes for this crowd are often an extension of professional experience in their earlier careers – with a few key twists. Imperative for most is the directive *not* to include actual years from the 1960s, 1970s, and 1980s. That doesn't always translate to eliminating valuable experiences in those earlier decades. Lead off the experience section with somewhat traditional dates (i.e., 2009–2013), and, prior to the late 1990s, change the format to reflect *number* of years instead of actual years (i.e., Controller, 6 years [with the company information and oneliner reflecting top contributions]; Senior Accounting Manager, 3 years, and so forth), including relevant financial management roles and not detailing the earlier A/P, Accounting Clerk, and Junior Accountant positions.

Other salient recommendations include the following:

- Because many in this group are looking to maximize earnings, it is important to capitalize on what they know. They need to strategically consider the value of their experience and promote their expertise, carefully evaluating how many years of history to share so the depth of knowledge and experience is demonstrated while not overtly aging them on paper. A sound strategy can prevent a candidate from elimination due to being overqualified or perceived to require compensation that exceeds the range.

- Highlight a candidate's energy, enthusiasm, ability to work extra hours or travel without hindrance, and be relied on as a dependable, loyal contributor. With age comes a "seasoning" that this group of job seekers can stress. An accompanying cover letter can convey this candidate's exceptional work ethic and loyalty – if true – the track record of someone who is not a job-jumper but a professional interested in being part of a team on a long-term basis (not using the opportunity as a stepping stone).

- Ruth Pankratz recommends emphasizing skills are current. She suggests Career Persisters attend courses, workshops, seminars, and conferences—then incorporate key details on the resume either in a classic education/professional development section, a highlight bullet in the profile, or both.

- Certifications can provide a third-party credential supporting qualifications while helping to translate experience into talents that employers are seeking. Job seekers should demonstrate job requirement competencies in the resume by using accomplishments and training to overcome preconceived biases.

- Pankratz also suggests that, for some "younger" Career Persisters, resumes might appropriately be age-proofed by limiting work content to 15–20 years of experience instead of including an entire career work history – there is likely no benefit to mentioning every job. This approach may not work for Career Persisters at senior managerial levels (for instance, a top financial professional seeking another CFO role will benefit from including a brief trajectory of experience that can go back more than 20 years).

- There are no hard and fast rules about how many years of experience to include. Note dates going back to 1987 on the resume example included on page 23 in the Appendix of this report. Leaving off old dates is a balancing act; for this client, leaving off the old dates could make them look older and cut a large chunk of work experience, so the old experienced is condensed while still providing dates. Create a resume that accurately represents the client. When the hiring manager and candidate eventually meet in person, a large difference in perceived and actual age can start the relationship off on the wrong foot.

- Laurie Berenson concurs with this sentiment and reminds candidates that their resume is a marketing document. There is no requirement for it to include a chronological listing of one's entire career or every date (i.e., years of graduation). Include what is relevant and value-added in showing qualifications for the position at hand. It is acceptable to leave off facts that may age or work against the candidate.

- "Age defy your job search and place in the work world by fulfilling a need," suggests Debra Matthews. Supplying companies with a needed service is ageless, discrimination-less, and essential. If a candidate is teaching a course, it is not because they are 50+, it is because they are knowledgeable and skilled in training. If a candidate can account for contributing $250,000 in revenue to a business, it is not their age, it is their talent that stands out, Matthews adds. Think about the skills that differentiate a candidate.

- Marsha Toy Engstrom reinforces the need to provide proof of continuous learning, an important skill in the job market, asking candidates to articulate: "What evidence do you have of being a continuous learner? How have you kept up in your field?" Professional journal reading, online classes, and live workshops can all be ways we learn, grow, and challenge ourselves. Find an appropriate way to talk about this on the resume and in the interview and hiring managers will take note.

- Engstrom also recommends communicating details in a resume that highlight communication skills (customer service situations, speaking to the public, being persuasive), being team oriented (and problem solving, helping younger colleagues through expert mentoring capabilities), being high achieving (strong work ethic, welcoming exciting, challenging projects and working hard to get desired results – all with specific examples), being self-reliant and intrinsically motivated, and being loyal.

- She adds, "Boomers aren't likely to job-hop after six months, leaving a company's training dollars flying out the door with them. Although employers might fear 60+ candidates are close to retirement, they've shown more job longevity than younger workers." Candidates should underscore job tenures as proof of dependability and remember that storytelling is part of their culture of great communication.

Coaching Strategies for Encorist Careerists

Encore Careerists are ready for new career and job opportunities, but they also want to make sure that any work commitment suits their ideal lifestyle. As career coaches, we are used to helping clients make sound career choices within the context of their lives. The acronym "CHAMPION," adopted by Ruth Winden, addresses this unique blend of life and career plans as clients embark on the next chapter of their journey.

Why the word CHAMPION? It signals to clients that they need to champion their own cause, as "a person who enthusiastically supports, defends, or fights for a person, belief, right or principle." It describes a coach's passion for championing clients as they step into their future selves and fight for what they want, believe, and deserve.

CHAMPION stands for key aspects of living unretirement to the full:

C - Community (What do you want your community to look like? Who do you want to be part of your community? How will you make a contribution?)

H - Health (How is your health? What can you do to improve and maintain your health? Are there any health concerns that will impact on your ability to work?)

A – Aspirations (What are your personal and career aspirations for this stage in your life? Is there something you always wanted to do, but never had the opportunity to explore further?)

M – Money (How financially secure is your future? What income do you need from work, if any?)

P – Purpose (What matters to you? What would make your career and life worthwhile and meaningful? What values need to be fulfilled? What legacy do you want to leave?)

I – Interest (What piques your interest? What fascinates you? What do you want to explore, learn and master over the coming years?)

O – Opportunities (What opportunities do you see for your next life phase? Which are most appealing? Who have met in your life and career that can help you create opportunities and open doors?)

N – Non-negotiables (Looking ahead to your life over the next 5–10 years, what has to be in place for you? What is a 'must-have'? What is a 'must-do'? What will you not do without?)

Wende Gaikema advocates “taking out time for self-reflection and asking yourself good questions now that you have reached a time in life where you have options and possibilities. Consider your next step before you jump into something that will drain energy and leave you frustrated.” Gaikema suggests the following process to help Encore Careerists decide what to do in their next phase:

- DREAM BIG: Step back and ask yourself broad vision questions:
    - “What would I do if I had unlimited resources and knew I couldn’t fail?”
    - “What you’d like said about you at your 85th birthday party?”
    - “Imagine you are 85 years old and looking back at your life. Which dream from your list would cause you the greatest regret if you had NOT pursued it?”
    - “What’s the cost of NOT pursuing it?"

  Write down these dreams and desires without dismissing any of them at this point.

- WHO AM I? Stay curious and don’t judge yourself as you ask questions like:
    - “What are you passionate about? What makes you mad, sad, or glad when you read the news?”
    - “What are your strengths, gifts and key abilities?"
    - “What do you always seem to end up doing no matter where you are?”
    - "What are your interests?”

  Ask people who know you well or with whom you have worked to tell you what you do well. Look for patterns in your life. Brainstorm about different ways you can use those strengths and talents. Take this free assessment and see what work areas that lines up with. https://www.mynextmove.org/explore/ip

- TRY IT OUT. Look at what roles you’d want to explore. Find people who are doing what you think you’d like to do and ask them questions about their jobs.
    - “What type of work setting, people and topics do you want to be involved with?”
    - “Is there a low-cost, low-commitment way for you to volunteer, try it out, get a certification, and just learn more if this is really what you want to do?”

  The most important thing is to get started. You likely won’t find your next move by staying in your house or on your computer. Take some time to assess what you want to do and who you are and then get going! Make sure you keep moving and take one small step everyday toward that job and life you want.

In the career exploration and job search processes, professionals aged 60+ will have extensive personal and professional experience they can draw upon. Especially if they have been in full-time employment, they might not be familiar with all the working arrangements open to them these days: portfolio careers where they can combine interests, income streams, and a mix of employment or self-employment.

- Encourage Encore Careerists to reach out to the extensive networks they have built over their lives and careers. Who have they developed good relationships with? Who are the connectors in their lives? Who can help them with information, advice, leads, and internship or work shadowing opportunities?

- As Encore Careerists are keen to explore new career opportunities, they have the same amount of work ahead of them as anyone who wants to make a career change at an earlier age. Help them focus on what they have (transferable skills and experience, professional networks, wisdom and maturity, leadership and interpersonal skills) and what they bring (expertise, intelligence, perspective, long-term commitment and stability). Do not let them focus on (and fret over) what they don’t have (i.e. youth). Some avenues may be out of the question (like long-term retraining commitments to become a lawyer or medic), but what opportunities are there to work in these fields without a decade of retraining?

Career Collateral Strategies for Encore Careerists

Encore Careerists can have the most fun with marketing themselves for their newfound direction. Once the coaching has occurred ("what would you really love to do?") and the mindset is mapped with possible (multiple!) targets, creating the supporting documents is next.

- With collaterals for this audience, it's essential to infuse the content with personality – especially for the Encore Careerists who is targeting roles in an entirely different direction. Address the "why this? why now?" question head-on: "At this juncture in my career, I am seeking to pursue a long-time passion and interest, working with high school youth and helping them to secure appropriate job shadow and employment opportunities. You'll find my background in social services to be uniquely applicable to this role as evidenced by my private sector work with ABC Agency for more than 15 years." Whether it's 15, 25, or 40 years, stop at "more than 15" or "15+" years as part of a candidate's written strategy.

- Stress any particular advantages to the employer: "Having accepted very early retirement from the state, I'm fortunate to have a full health benefit plan and, therefore, would not be seeking these as part of a compensation package" (suggest emphasizing with "very" on purpose, so reader doesn't think this person is *really old).*

- Storytelling can play a big part in how this type of candidate positions for their encore career. "Although it has been a number of years, I was active in community theatre as a young adult following eight years of experience in both high school and college productions. The opportunity to work part-time in the box office and lend marketing expertise to the promotions department at the Goodspeed is especially appealing at this juncture in my career."

- Wende Gaikema points to the power of asking yourself good questions – important for coaching work and for development of collateral. At the core, a candidate should know their strengths, gifts, and key abilities. Many successfully navigate their careers never having taken an assessment of their strengths and capabilities. Gaikema recommends the DISC and Myers Briggs as helpful tools in defining personality and providing insights into exploring next steps in a career. Tom Rath's StrengthFinder 2.0 is also especially useful in highlight an individual's top five strengths.

- "It's all about how you put a spin on your experience," suggests Laurie Berenson. She recommends highlighting the value add and wisdom developed from a candidate's years of experience not offered by a younger, less experienced individual. This can translate into powerful statements on a resume.

- Berenson further notes that if an individual is re-entering or working longer than previously planned, they indicate that they are looking for a meaningful way to spend their time and energy – while still have something of value to contribute and/or give back. "A body in motion stays in motion" is a true concept. A candidate should convey high energy and explain that they feel strongly about staying active.

Conclusion

Career professionals offer unique value in helping Encore Careerists and Career Persisters gain the insight necessary to make informed choices and create plans that smooth transitions as they move toward unretirement.

There are hurdles and possible barriers to overcome – from positioning a candidate as the experienced go-to-expert on paper, online, and at the interview, to addressing any skepticism and reminding others of the distinct value experienced professionals make and the long-term commitment they present.

And, there are reasons to be optimistic:

- As society ages, the workforce ages, and it will be more common than ever before in the last 50 years to deal with older recruiters, older hiring managers, older co-workers, and older customers.

- Governments worldwide realize the cost of missing out on the talent (and tax contributions) of experienced professionals. As the burden of providing state pensions grows to unaffordable levels, new national, regional, and local initiatives will allow those who can and want to work to remain productive members of a multigenerational workforce.

- As Baby Boomers have done since the 1960s, they are redefining societal norms and expectations. The oldest of this clan are turning 71 years of age in 2017 – with the babies now 53. Statistics abound for the highest percentage ever of those 60+ working in their unretirement. According to Bloomberg.com, citing a 2015 US Federal Reserve study, "27 percent of Americans plan to keep working as long as possible with an additional 12 percent stating they don't plan to retire at all."

We trust the information from fellow career coaches and professional writers in this white paper will equip you to effectively support your clients in making better choices, and informed decisions, and help them in their transition into unretirement. And, if you are a prospective Career Persister or Encore Careerist yourself, we are confident the strategies presented will prove equally helpful.

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Editors

Jan Melnik, M.A., MRW, CCM, CPRW
Absolute Advantage
Durham CT USA
www.janmelnik.com
jan@janmelnik.com
@janmelnik
860-349-0256

Marie Zimenoff, NCRW, NCC, CPBS, MRW, CELDC
Career Thought Leaders
Fort Collins CO USA
www.careerthoughtleaders.com
marie@careerthoughtleaders.com
@workwithpurpose
970-420-8413

Ruth Winden, CCMC, CJSS, CSMCS, MBTI, WBI
Careers Enhanced Ltd
Yarm Durham U.K.
www.careersenhanced.com
ruthwinden@careersenhanced.com
@RuthWinden
+44 (0) 7949569993

Contributors

Laurie Berenson, CMRW, CPRW, CEIC
Sterline Career Concepts, LLC
Franklin Lakes NJ USA
www.sterlingcareerconcepts.com
laurie@sterlingcareerconcepts.com
@LaurieBerenson
201-573-8282

Nancy Collamer
Collamer Career Consulting
Old Greenwich CT USA
www.mylifestylecareer.com
njcollamer@gmail.com
@NancyCollamer
203-698-3160

Wende Gaikema, MBA, ACC, CCMC
Coach Wende
Houston TX USA
www.coachwende.com
wende@coachwende.com
281-813-9633

Debra Ann Matthews
Let Me Write It For You: Job-Winning Resumes
Clarksville TN USA
www.letmewriteitforyou.org
letmewriteitforyou@gmail.com
@Letmewriteit4u
931-269-9718

Judith Monaco
Monaco Writing & Consulting Services
Savannah GA USA
www.monacowriting.com
judithmonaco@comcast.net
610-495-3007

Debra O'Reilly
A First Impression Resume Service / ResumeWriter.com
Brandon FL USA
www.resumewriter.com
debra@resumewriter.com
@deboreilly
813-651-0408

Ruth Pankratz, NCRW, CPRW, MBA
Gabby Communications
Fort Collins CO USA
www.GabbyCommunications.com
Ruth@GabbyCommunications.com
970-310-4153

Marsha Toy Engstrom, MA, SPHR
GO! Career Coaching
Sacramento CA USA
www.gocareercoaching.wordpress.com
gocoachmarsha@gmail.com
530-666-2976

Appendix

This appendix includes contributions from leaders in the career field, sample resumes, and sample cover letters to use as a guide when creating your career change, job search, interviewing, and career marketing strategies.

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Putting a Positive Spin on Your Value

Laurie Berenson, CMRW, CEIC, CPRW

Your resume is a marketing document. There is no requirement for it to include a chronological listing of your entire career or every date (i.e., years of graduation). Include what is relevant and value added in showing your qualifications for the position at hand. It is okay to leave off facts that may age you or work against you.

It's all about how you put a spin on your experience. Highlight the value add and wisdom developed from your years of experience that's not offered by a younger, less experienced candidate.

If re-entering or working longer than previously planned, say you're looking for a meaningful way to spend your time and energy and that you still have something of value to contribute and/or give back. "A body in motion stays in motion" is a true concept. Explain that you feel strongly about staying active.

One counter argument to your age is that you are a viable candidate and a cost-effective, long-term hire for a mid-level role because you are no longer looking to rise through the ranks. You are satisfied with remaining in a mid-level role and do not pose the same flight risk as a younger candidate.

3 Easy Ways to Prepare for a Second-Act Career

Nancy Collamer

A majority of Boomers say they'd like to work in retirement. Yet in practice, most don't focus on planning their second acts until after they retire. They are simply too busy juggling the demands of their busy present day lives. But if you want to maximize your options for the future, it's important to plan ahead. Fortunately, there are some very simple (and fun!) things you can do to get the process rolling – even while you're working full time.

Here are three to consider:

1. Set-up a running file of second-act career ideas. No matter how many years you have until retirement, chances are you have at least a few thoughts on what you'd like to do in the second half of life. Perhaps you're considering work as a consultant, starting a business with a colleague, or finding a position with a nonprofit.

Whatever your "someday dreams," it's helpful to capture them in writing. Start a file of second-act possibilities today. It really doesn't matter if you capture your ideas in a journal, on the computer or in a pretty notebook, so long as you collect them in one place. Over time, you will build a collection of resources and ideas that will help lead you into your next act.

2. Surround Yourself with Second-Act Inspiration: One of the best ways to expand your sense of what's possible is to learn from other second-act career reinvention stories. We all enjoy a good story and there is almost always a valuable tip, resource, or lesson that can be valuable to your situation.

Fortunately, there is a growing collection of inspirational second-act stories on the web. A few of my personal favorites include NextAvenue.org (PBS site for people over 50), Encore.org (nonprofit options) and my list of 100+ Great Second-Act Career Resources on my website at MyLifestyleCareer.com.

3. Throw a Second-Act Brainstorming Party. By the time you hit middle age, you have a wide network of associates who can provide interesting ideas, perspectives, and experiences that might be useful in planning your second act.

To host a brainstorming party, invite a group of six to eight friends over for a casual brunch or dinner. Include people who are supportive personalities and/or creative thinkers (no Debby Doubters or Doug Downers welcome).

Throw out a few questions to focus the discussion and then let the conversation flow. Allow people to speak freely and avoid the temptation to critique ideas as they get shared. Make it easy for people to help you by asking for specific information and resources – the clearer you are, the greater the odds your friends will be able to help you in concrete and meaningful ways.

Remember, regardless of where you are on the road to retirement, it's never too early to begin to prepare for a meaningful second act. The important thing is to get started.

The Power of Asking Yourself Good Questions

Wende Gaikema, MBA, ACC, CCMC

Congratulations! You've reached a time in life where you have options and possibilities. You may have worked for a long time in one field and are considering whether that's what you really want to continue to do. Or maybe you're re-entering the workforce. It's worth taking time for some self-reflection to consider your next step before you jump into something that will drain energy and leave you frustrated.

DREAM BIG

Step back and ask yourself some broad vision questions like:

- "What would I do if I had unlimited resources and knew I couldn't fail?" Write down these dreams and desires without dismissing any of them at this point.
- "What you'd like said about you at your 85th birthday party?"
- "Imagine you are 85 years old and looking back at your life. Which dream from your list would cause you the greatest regret if you had NOT pursued it?" "What's the cost of NOT pursuing it?"
- "If you could invest the years ahead and knew you could change one thing in the world around you, what would you do?
- "Consider the eight major areas of life (Work, Money, Physical Surroundings, Recreation, Health, Spiritual, Family & Friends, Personal Growth). Where are you now in these areas and where would you like to be? What would it take for you to make progress in the most important area?"

Now, start writing your ideal life vision of what these next years will be like.

WHO AM I?

Next, spend some time understanding yourself better. Stay curious and don't judge yourself.

- "What are you passionate about? What makes you mad, sad or glad when you read about it in the news?"
- "What are your strengths, gifts and key abilities?" If you aren't sure, consider taking some online personality and strengths assessments. Many are free or at a low cost. DISC and Myers Briggs are helpful personality assessments. *StrengthFinder 2.0* by Tom Rath is an excellent book with an online assessment to help you understand your strengths. Ask people who know you well or with whom you have worked to tell you what you do well. Look for patterns in your life. What do you always seem to end up doing no matter where you are? Brainstorm about different ways you can use those strengths and talents.
- "What are your interests"? Take this free assessment and see what work areas that lines up with: https://www.mynextmove.org/explore/ip. You may learn about new roles and fields.

TRY IT OUT

Now, look at what roles you'd want to explore. What type of work setting, people and topics do you want to be involved with? Find people who are doing what you think you'd like to do and ask them questions about their jobs. Is there a low-cost, low-commitment way for you to volunteer, try it out, get a certification, and just learn more if this is really what you want to do?

The most important thing is to get started. You likely won't find your next move by staying in your house or on your computer. Take some limited time to assess what you want to do and who you are and then get going! Make sure you keep moving and take one small step everyday toward that job and life you want!

STAYing Engaged in An Un-Engaging Job

Debra Ann Matthews

Turn your frown upside down when looking for options to feel more purposeful in your job search.

When trying to **STAY** engaged in an otherwise un-engaging job, try the following:

Seek out work-at-home options to have a job from coaching to checking in car rental reservations. You will have to pay to join Flex Jobs (http://www.flexjobs.com/), but the stay-at-home job leads are credible, viable, and offer a wealth of various diverse jobs that just may help you to feel more engaged in your work life.

Tune into jobs that appeal to you. Seek to obtain an interview with a job-winning resume and LinkedIn profile. Ask recruiters if their company would consider hiring you to fulfill projects on a contract basis. Support your ability to finish the job within a quarter (say 3 months in lieu of 12 months). Be prepared to support your increase salary and ability to complete tasks, completing the job for the company in less time.

Age-defy your job search and place in the work world by fulfilling a need. Supplying the world with a service is ageless, discrimination-less, and needed. If you teach a course it is not because you are 50+, it is because you are knowledgeable and can help untrained learners learn. If you can account for $250,000 in revenue for a small business, it is not your age, it is your talent that stands out. Think about skills you have that stand out.

Yes. Say yes to more learning. Most states are now offering free associates level training. Say yes to learning something else that will help you expand your job skills in the world of work.

Focus, Target Audience, and the Great American Memoir

Debra O'Reilly

In real estate, the top three considerations have always been: Location, Location, and Location. In job search, the top three considerations are: Focus, Focus, and Focus.

This applies to all ages, all occupations, and all levels of ability.

I cannot think of a single exception to this rule: **To get the attention of your target audience, you need to have … a target.**

You need to study and understand that target's needs. You need to think like that target. You need to contextualize your expertise and experience in the target's lingo. And you need to share the essentials so you optimize the reader's time and focus his/her attention on your value.

For jobseekers who are 60+, it seems that the greatest struggle in this regard is, "How can I leave anything off my resume? Everything I've ever done has led me to where I am now. Surely employer X/Y/Z needs to know!"

I understand. Your story is fascinating. Someday it will inspire a Great American Memoir.

But a busy manager may have 45 minutes before the next meeting to peruse 150 resumes to fill the next of a dozen positions in her growing warehouse. At that pace, she doesn't care that a 60-something-year-old worked nights as a barback in his youth before he found his niche in inventory management.

It is **essential** to define your target. Find out WHO your audience really is. Find out WHAT needs to be accomplished to reach the audience's goals. Find out WHY the position is open. Find out WHERE you can provide the greatest value. Find out HOW to present your information to demonstrate your fit for the job and create next steps in the hiring process.

Once you've landed the job, feel free to get busy on that Great American Memoir. We're waiting for the rest of your story!

Resume Strategies for 60+ Job Seekers

Ruth Pankratz, MBA, MRW, NCRW, CHJMC

Emphasize relevant experience by keeping skills current – attend courses, workshops, seminars, and conferences. Certifications can provide a third-party credential supporting qualifications while helping to translate experience into talents that employers are seeking.

Demonstrate job requirement competencies in the resume by using accomplishments and training to overcome preconceived biases. Age proof the resume by limiting work content to 10–15 years of experience instead of including an entire career work history – there is no benefit to mentioning every job you've ever had.

5 Major Mindsets for Boomer Career Success

Marsha Toy Engstrom

I'm going to let you in on a little secret…When it comes to a successful job search, it's not *what* you know, or even *who* you know. Of course, those *are* very important … But, the most important factor is your *mindset*.

1) **Attitude Tops Ability**. As a corporate recruiter, I would hire a positive, upbeat person over a Debbie Downer. Every. Single. Time. When you're a "more experienced" candidate it's especially important because – face it – you've had additional time to collect extra baggage.

I worked with a client recently who had outstanding business skills, but he displayed venomous anger over his layoff and frustration with his job search. These negative feelings were screaming so loud, I couldn't hear anything else he said. If you're not done with the past, see a counselor – quickly. Work through your history before discussing your future. You can't afford to drag old baggage into your current job search.

2) **Exude Energy and Excitement.** Candidates who are *appropriately* eager, excited, and enthusiastic convey an energy that has nothing to do with age. Why are you excited about this role? This company? Show your passion about *specifically* what you're eager to accomplish for them. Let them see your *professional* enthusiasm … Not to be confused with a certain actor's "couch jumping" episode on Oprah – that's not excitement; that's insanity.

3) **You Love New Tricks.** We all know the saying about the old dog – and we also know it's not necessarily true. What evidence do you have of being a continuous learner? How have you kept up in your field? Professional journal reading, online classes and live workshops can all be ways we learn, grow, and challenge ourselves. Find an appropriate way to talk about this in your interview and hiring managers will take note.

4) **Kick Fear to the Curb**. We all have occasional self-doubts and portions of the job search may give us cold feet – whether it's asking friends for help, cold-calling for informational meetings, or following up on resume submissions. But think of FEAR as just: "False Evidence Appearing Real." Yes – it can be scary, but when we pick up the phone and make that first call, it makes the second call easier. By the third? Piece of cake. I promise.

5) **Patience and Persistence Will Win**. There's a Japanese proverb that reads, "*Fall seven times, stand up eight*." Each time we fall, we learn how to do it differently next time. Be tenacious. Stay the course with your job search—recognizing that the path to success may not be a straight line. Enlist a coach or a buddy's help; break it down into baby steps; use your calendar to keep you on track; take a break when you need one; but get back on the road. Learn, grow, and persist. The next step could be the one that leads you to your new opportunity.

Manage your mindset—and go for it!

Top 5 Ways Boomers Can Sell Their Strengths

Marsha Toy Engstrom

You've likely heard that standard interview question, "What are your strengths?" Of course, you'll be prepared to answer this question specific to yourself, but today I'm asking that you also think about your strengths in a different light. What are your strengths based on your generation?

Instead of apologizing for our age, it's time 'The Pepsi Generation' started leveraging the positive attributes we hold as a group. Here are several recognized assets that are specific to the over-60 crowd—and finding ways to emphasize these during your career search can lead to job success.

1) **Great Communicators**. Let's not forget that ours was the last generation to actually *talk* to each other. No texting or emailing for us until recently – so we learned early that a smile, eye contact, and appropriate body language were sometimes more effective than the words we used. We're seen as empathic – consequently we're great in customer service situations and speaking with the public. We're also effectively persuasive.

2) **Team Oriented**. Our strong sense of community allows us to thrive in team environments. We problem-solve well with our peers, incorporating the skills and experience of the entire team. This also allows younger colleagues to benefit from our mentoring capabilities. Being able to sell your team-playing and mentoring abilities—while detailing specific examples—gives you leverage in interviewing situations.

3) **High Achievers.** Our competitive cohort didn't just try to "do well" – we tried to beat everyone else. There weren't participation trophies for our group – we played to win. Period. We therefore, have a strong work ethic – we welcome exciting, challenging projects and work hard to get desired results. Be prepared to give specific examples of how this is true for you. Remember, employers want to be winners too!

4) **Self-Reliant**. As employees, we're a pretty low-maintenance lot. We plan our work, and work our plan. We're intrinsically motivated and don't need a lot of outside encouragement or praise. We just solve our problems as we go, and complete the work before the deadline. We take pride in our work, and the results. 'Get-er-Done' could be our motto… (but without the red plaid shirt and camo hat, please.) You can bet that busy potential bosses would really appreciate having at least one employee who's self-nurturing.

5) **Loyal**. At the risk of sounding like the family dog... Boomers aren't likely to job-hop after 6-months, leaving the company's hard-earned training dollars flying out the door with them. Although some employers might fear that we are close to retirement, we've been shown to have more job longevity than younger workers. Underscore your own job tenures as an example of your dependability.

Knowing the key strengths of our generation, should not only give you more confidence in your job search interactions, but also provide some great talking points to tailor to your own rich experience stories. And don't forget – story-telling is part of our culture of great communication.

DONALD J. THOMPSON

Pittsburgh, PA 17300 | djthompson@gmail.com | 717-493-3838 cell

EXECUTIVE LEADERSHIP PROFESSIONAL WITH DISTINGUISHED RECORD OF SERVICE

DEPUTY INSPECTOR GENERAL | EXEMPLARY CAREER IN LAW ENFORCEMENT & INVESTIGATION

Accomplished professional with 25+ years of leadership experience and demonstrated ability to drive change, optimize operations, and ensure design and implementation of best practices. Record reflects fiscally sound management approach and ability to secure grant funding as well as conserve resources/save taxpayer money.

- Experienced senior-level manager with exceptional leadership and mentoring/coaching abilities.
- Keen community liaison. Staff training and development skills.
- Expert investigative abilities with background conceiving/implementing corporate security plans and measures.
- Proven performer who thrives on challenges, delivers results under pressure, and leads by example, consistently exceeding all expectations. Irreproachable professional ethics, integrity, and loyalty.

PROFESSIONAL EXPERIENCE & ACCOMPLISHMENTS

PENNSYLVANIA OFFICE OF INSPECTOR GENERAL | Harrisburg, PA Aug. 2011–Mar. 2015; Oct. 2015–Present
Deputy Inspector General *(10/15–Present)* **• Director** *(3/12–3/15)* **• Investigation Manager** *(8/11–3/12)*

Recruited back to OIG as #2 official in agency. Manage programmatic/administrative areas comprising 220+ employees throughout 4 bureaus (Fraud, Prevention & Prosecution; Special Investigations; Administrative Services; Info Technology) across Commonwealth from Philadelphia, Pittsburgh, Wilkes-Barre, and Harrisburg offices. Direct advisor to Inspector General.

- **Bring hands-on leadership and culture of clarity/transparency/responsibility** to day-to-day operations. Immediately instituted strategic measures to turn around low morale, instill a highly visible presence throughout all offices, launch training initiatives, and cultivate climate of respect and professionalism.
- **Defined team of 4 and launched strategy sessions** to prepare for first-ever comprehensive Peer Review (anticipated Spring 2016). Instituted weekly directors' meetings to ensure timely, ongoing communications and planning.
- **Designed and implemented ridealong program** with field agents across Commonwealth.

In role as Director, Bureau of Special Investigations (3/12–3/15), oversaw 22 investigators and 2 managers, investigating agencies under Governor's jurisdiction and managing all major investigations. Hired to enhance agency operations and restore respect/professionalism to Office of Inspector General by implementing best practices and transparency.

- **Directed complex and confidential investigations,** including prevention and eradication of fraud, waste, abuse, and employee misconduct within Commonwealth agencies and programs while assisting agencies under the Governor's jurisdiction in running a more efficient government and saving taxpayers money.
- **Initiated and effectively reorganized investigative team,** streamlining management while instilling professional development program that included training, coaching, and mentoring. Result: Optimized overall operations, generated 30% savings, created culture of accountability, and promoted several investigators.
- **Collaborated with Chief Counsel;** provided leadership, focus, and direction for case management and implementation.
- **Cultivated and managed excellent relationships with stakeholders** (including investigators, attorneys, and other principals within the Office of Inspector General). Recognized for highly effective leadership and management style.

NORTH STAR LOGISTICS | North Windham, CT Mar. 2015–Oct. 2015 — Grants Administrator

Retained as consultant to launch new grants administration effort for marketing/communications start-up company specializing in marketing, conference management, and Continuing Medical Education (CME) for medical institutions (6-month assignment). Managed grant writing for CME program for Memorial Sloan Kettering Cancer Center (NYC).

- **Authored medical grants, securing 20+ grants** valued in excess of $250K partially underwriting 10 professional conferences in New York City during 2 quarters of 2015.

ES3, LLC | York, PA Aug. 2010–Aug. 2011 — Security Operations Manager

Recruited to manage multi-facility security program for nation's largest grocery distribution center spanning 100+ acres. Provided oversight of proprietary and contract security personnel (30 direct staff), budgets, physical security, systems, projects, and corporate investigations. Implemented policies that significantly improved overall security posture.

- **Instituted best practices relative to loss prevention,** managed employee misconduct, and delivered site safety and security training (facility received 1,000+ tractor-trailers daily, supplying the entire Eastern Seaboard and Midwest).
- **Successfully investigated and resolved felony fraud investigation** within first 2 weeks on job,; ultimately, rebuilt entire security force. Provided additional investigative support throughout region.
- **Completed site risk assessments,** ensuring compliance with government regulatory/customer-driven requirements.

NMS SECURITY *(Subsidiary NANA Management)* **| Anchorage, AK Apr. 2008–Jan. 2010**
Manager of Operations & Business Development

Managed 90 officers and oversaw security planning, operations, and business development efforts across East Coast operations. NMS provided top-level security, investigative, and property protection services to 100+ clients in government, corporate, manufacturing, health care, and telecom. Held security licenses in multiple states.

- **Managed security issues,** conducted infrastructure analysis, and performed security surveys for high-profile strategic account with multiple plants nationwide; customized security to their specific requirements.
- **Plant staffing management** entailed hiring/selection, scheduling, retraining, standardizing uniforms, and establishing protocols/procedures across multi-shift operations. Ensured compliance with state laws.

CONNECTICUT STATE POLICE 1987–2007 — Resident State Trooper, Old Lyme

Managed complete residential policing activities, including staff of constables (6 full-time/1 part-time) and 1 secretary. Oversaw capital equipment, budget, purchasing, fleet, and chief liaison role with local government.

- **Cultivated relationships with Boards of Selectmen/agencies.** Keen understanding of tourism issues on small towns.
- **Boosted morale/productivity** by implementing clear, measurable objectives and enhancing work environment.
- **Effective grant-writer.** Developed and won annual DWI grants funding augmented enforcement during holiday seasons. Authored "Cops Fast Grant," providing for one additional police officer through federally funded program for 3 years. In addition, secured more than $.5 million in grant monies that funded SMART speed monitoring machine, new patrol vehicles, and other initiatives.
- **Recipient, Life Saving Award** and **Meritorious Service Commendations.**

Earlier Career with Connecticut State Police included following positions/awards:

- **Detective, Casino Unit** | Mohegan Sun/Foxwoods Casinos, CT
- **Road Trooper:** Troop E*,* F *&* K
- **Certified U.S. Navy Diver/Certified Ice Diver** (Canadian Military Ice Diving Experience); Member, CSP Police Dive Team*;* Graduate, U.S. Navy Dive School*.* Recipient, **Citation, Exemplary Performance, Dive Team** *(1996).*

EDUCATION

M.S., Forensic Science, UNIVERSITY OF NEW HAVEN | West Haven, CT (1993)
B.A., Criminal Justice; Concentration: Psychology, UNIVERSITY OF CENTRAL FLORIDA | Orlando, FL (1987)

Extensive Continuing Professional Education includes following highlights:

- State's Attorney's Association Legal Training Program
- Community Policing Consortium
- Resident Trooper Training
- First Line Supervision / Critical Incident Management
- Legal Issues for First Line Supervisor
- CT State Police Academy
- Association of Inspectors General: Inspector General Institute® Certification Program (Jacksonville, FL; March 2016)

ERICA L. RALSTON

123 Main Street ▲ Omaha, NE 68102

elralston@gmail.com
xxx.xxx.xxxx (M)

BUSINESS ATTORNEY | INSTRUCTOR

~ Committed to bringing real life into the classroom ~

GOAL: Adjunct faculty position that allows me to combine expert knowledge of the law with vast professional experience to enrich and enliven the classroom beyond what students can learn from a book.

PROFILE: Practiced attorney with 20+ years of diverse experience spearheading international commercial transactions in law firms and corporate environments. Expert in all business law matters with the interpersonal skills to adapt and succeed in a multitude of cultures. Excellent written and oral communication skills with a history of providing legal education on a variety of topics. Licensed to practice law in NE & CA.

AREAS OF EXPERTISE

- **Business Organizations**
- **Corporate Structure**
- **International Transactions**
- **Mergers & Acquisitions**
- **Corporate Governance**
- **Project Financing**
- **Forbearance / Workouts**
- **Bankruptcy**
- **Secured Transactions**
- **Corporate Divestitures**
- **Corporate Securities**
- **Legal Writing**

COURSES PRESENTED

- "Project and corporate financing loan documents of the company – how to review and ensure compliance with covenants, representations and warranties"
- "Lender rights and remedies in the pledged and mortgaged assets of the Company and its subsidiaries – how to avoid defaults and events of default"
- "What is the attorney/client privilege and what communications are covered?"
- "E-mail etiquette and professionalism"
- "Corporate governance"
- "Operating a subsidiary in bankruptcy"
- "Discovery in litigation and arbitration"
- "Term sheets and letters of intent"
- "Business writing"

PROFESSIONAL EXPERIENCE

WSG POWER, LLC, San Diego, CA — 2010–Present

Only US company generating all 3 types of renewable power (wind, solar and geothermal); owner/operator of largest domestic wind power facility.

Associate General Counsel

Challenged to lead transactional negotiations for a number of critical deals, including multiple project financings, lease financings, corporate finance (parent company level), and mergers and acquisitions. Directed due diligence, performed regulatory analysis, and managed outside counsel to ensure the highest quality of legal work product.

- Conducted negotiation and drafted documentation for the aggregate $650M construction and mini-perm project financings for 2 phases of the Alta wind project representing 300 MW of capacity.
- Selected as key member of cross-functional team managing multibillion-dollar project debt and tax equity required to support build out of the Alta Wind Energy Center, currently the largest wind project in the US.
- Lead internal counsel on team selling 100% equity interest in a 150 MW wind facility to a private equity sponsor. Headed challenging negotiations, partnered with outside counsel to structure documentation, and reviewed all bid documents (including information memorandum, first- and second-round bid letters, and transaction purchase and sale agreement).
- Directed all legal aspects of a $250M holding company, securing term loan B credit facility with certain non-project subsidiary guarantees.

PROFESSIONAL EXPERIENCE, *continued…*

RUBICON INTERNATIONAL, London, England 2008–2009
A wholly-owned subsidiary of The Rubicon Group, Inc.

Executive Director and Senior Counsel

Retained by parent company (upon its divestiture of substantially all of Universal's assets) to provide legal advice and transactional support to the First Investment Group in order to minimize risk and steer complex, international investments in businesses engaged in commodities products.

- Guided an investment in an emerging markets exploration and production oil company focusing on business in Central Asia, North Africa, Middle East, and North Sea.
- Tapped for key role on team that facilitated a joint investment with the IFC and other equity investors in a gas exploration and production company in Russia.

UNIVERSAL ENERGY, INC., Omaha NE 1995–2008
Independent power company acquired by The Rubicon Group, Inc. in 2003.

Senior Vice President, General Counsel and Secretary (2006–2008)
Vice President, Legal Counsel and Secretary (2004–2006)
Vice President, Assistant General Counsel and Assistant Secretary (1995–2003)

Promoted through positions of increasing responsibility to chief legal officer based on exceptional leadership and astute legal/business acumen. Managed external legal budget of $15M. Led team of 2 staff attorneys, 2 secondees, and 3 paralegals in numerous significant commercial transactions, including project financings, acquisitions, dispositions, restructurings, bankruptcy, asset purchase agreements, and securities offerings.

- Represented company in the development, construction, project financing, and operation of 28 power generation facilities (including in the Dominican Republic and India).
- Oversaw formation of and corporate governance for 140 entities in various worldwide locations.
- Played a key role in Rubicon's auction of a significant portion of Universal assets, including negotiating asset purchase agreements and acquisition financing and refinancing credit documents.
- Served on Executive Management Committee with high-level oversight of all business operations, including internal controls, risk management, and compliance.

EARLY EXPERIENCE

CALDWELL & VAN ALLEN PLLC, Omaha, NE
Associate, Corporate Dept.

ARBON, MORRISON & HANKS, San Diego, CA
Associate, Corporate & Bank Finance Dept.

EDUCATION

JD, PEPPERDINE UNIVERSITY SCHOOL OF LAW, Malibu, CA
Articles Editor, Pepperdine Journal of Transnational Law

OXFORD UNIVERSITY, EXETER COLLEGE, Oxford, England (Graduate studies in literature)
English Speaking Union Scholarship Recipient

BA, UNIVERSITY OF NEBRASKA, Omaha, NE
Phi Beta Kappa