



Wider Opportunities for Women

**BRINGING THE NATIONAL
ELDER ECONOMIC SECURITY INITIATIVE™
TO SCALE:
PRELIMINARY IMPLEMENTATION LESSONS**

Executive Summary and Summary of Lessons Learned

Prepared for

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EXECUTIVE SUMMARY

The Elder Economic Security Initiative (Initiative) at Wider Opportunities for Women (WOW) combines coalition building, research, education and advocacy at the community, state and national levels, offering concrete tools to shape public policies and programs to promote the economic well-being of older adults. The Initiative has successfully grown from a five-state pilot project to a viable movement to expand to 20 states, partnering with lead state organizations. WOW, in partnership with its national research partner, the Gerontology Institute at the University of Massachusetts Boston, has successfully applied the learnings from the pilot states; garnered funding to support this expansion; built national capacity; developed systems to provide significant technical assistance; and designed a variety of materials to support state partners in their implementation activities.

Organizational Capacity Building

Lessons learned about capacity improvements centered on WOW's careful development and documentation of administrative systems; increased staffing to handle the workload (e.g. a field coordinator); technological improvements (e.g. web access to resources); and increasingly diversified communication systems. Based on the pilot learnings, WOW has improved the state partner selection process to outline expectations, roles and criteria. WOW also learned to be clear with state partners about the importance of mission alignment since the monetary support provided is intended as venture capital and seed funding only, encouraging states to develop a strategic plan which includes fundraising for sustainability. The critical – and most valuable – resource that WOW provides is technical assistance which includes facilitation of peer networking and training through group calls and meetings; individual support when needed; and an online-accessible State Toolkit of adaptable materials, templates and examples. The establishment of these administrative systems and sharing of lessons learned has resulted in program efficiencies, such as quicker releases for each consecutive state's Initiative.

Organizing and Coalition Building

Identification of allies and development of champions from diverse stakeholder groups has proven essential for garnering support for the Initiative at the national and state levels. WOW has worked diligently to engage national leaders, as advisory board members and champions to promote the Initiative within their networks. These champions have engaged state affiliates, written articles, and spoken publicly about the Initiative. WOW has learned that organizing success factors for state leaders include strong mission alignment with the Initiative; established relationships in the aging field; a philosophical and action-oriented commitment to inclusivity, shared ownership, and diversity among partners; and clarity of purpose that is evident in their communications, leadership and relationships with all stakeholders. To overcome geographic and time barriers to building and convening statewide coalitions, state leaders are using a variety of tactics for recruitment, retention, and sustained involvement. For example, state partners have learned how to present the Initiative to special interest groups (and possible coalition members) by relating Elder Economic Security Standard™ Index data in ways that directly address their cause and help them achieve their mission.

Communications and Messaging

With the engagement of a public relations firm, WOW has developed core messages, terminology, training to ensure consistent usage, and provides technical assistance in preparing launch materials and media contacts. Lessons learned include using locally targeted messages that resonate with key audiences; scheduling simultaneous launch events in different parts of the state; sharing embargoed materials with reporters to give time to digest the information; and creating messages and presentations that effectively speak to the desired

audiences and pinpoint relevant points simply and powerfully. After the Initiative is launched, the next challenge is to cultivate long-term media relationships and continue to find “new” news to stimulate interest.

Efforts to attract media attention at the national, state and local levels capitalize on relationships with champions, well-known leaders, spokespersons who can share personal stories, and focused determination by stakeholders to raise awareness to issues affecting the elderly. The dissemination of data from the Initiative through other organizations’ public forums is an efficient mechanism for reaching a large number of stakeholders. WOW has increased the use of digital media to create an integrated media presence and effectively reach more audiences. In the next year, WOW will apply social marketing principles to change the public dialogue from one of poverty to economic security.

Research: Elder Economic Security Standard Index and Other Tools

The Elder Economic Security Standard™ Index (Elder Index,) considered the most realistic measure of living costs available, is the data foundation on which the Initiative’s work is based. The Elder Index has been peer reviewed by researchers and deemed very credible, given the data sources used, the caliber of the scientists producing it, and the rigorous methodology that ensures data accuracy, consistency and comparability. The development process has become more efficient as researchers gained experience with the work flow, data sets and state-specific issues. WOW and the Gerontology Institute at the University of Massachusetts Boston thoughtfully engaged data experts and field specialists to provide input and feedback on the methodology and data development. With the assistance of the Gerontology Institute, a national Elder Index database is underway as are plans for updating and maintaining the integrity of the database.

The power of the Elder Index lies in stakeholder’s ability to customize and use the data in their own work. For example, the state-specific “Policy Brief” designed by WOW, models the impact of income supports on the economic security of elders and illustrates the power of using the Elder Index for advocacy and policy work. In terms of supportive materials, templates, and tools, WOW has taken a responsive approach to development, learning what would be most useful from the field. New efforts are underway exploring the ability to quantify the number of elders at or below the Elder Index’s benchmark of income adequacy and to provide more examples of using the Elder Index data in direct service applications.

Advocacy

Advocacy activity to further the Initiative’s goals is critically important in influencing community leaders, policymakers, program designers and other stakeholders to acknowledge (and eventually use) the Elder Index as a more realistic measure of income adequacy. Advocacy lessons learned include casting the net widely to mobilize a broad base of support; finding champions and aligning with partners that have highly developed networks of aging organizations; using the Elder Index data to fill information gaps for special interest groups; and sharing ownership of the Elder Index and its information-rich resources. Providing targeted, audience-specific tools, and sharing them openly and widely has been a highly effective approach for supporting advocacy efforts. These include service-specific PowerPoint presentations; crisp, clear informational materials; highly relevant data from the Elder Index; and state-specific Policy Briefs. These tools have been used to raise awareness of the issue, educate stakeholders on how to use the data, and advocate for the incorporation of key concepts, terminology and Elder Index data in their work. The development of civic engagement tools and consumer education activities will increase the advocacy base with the inclusion of elder stakeholders.

Public Policy

Changing public policy and programs to ensure the economic security of elders are ultimate goals of the Initiative. Although changing the public dialogue from one of poverty to that of economic security will take considerable time, WOW is committed to sustaining the drumbeat of activity that will lead to positive changes for the economic well-being of elders. Lesson learned include demonstrating to partners and other advocates how to use the data to analyze programs and policies and advocate for maintaining current levels of funding. Ultimately, WOW and state partners intend to become knowledge leaders with respect to elder economic security. Evidence that progress towards that goal is being achieved is seen in the invitation for WOW to provide consultation on the Modern Poverty Measure Act of 2008 as well as the creation of WOW's proposed White House Task Force on Middle Class Working Families which includes retirement security as a priority.

The way to move the economic security adoption needle forward is to infuse the Initiative into appropriate dialogues, program planning and direct service activities at the national, state and local levels. WOW and state partners have learned to seize opportunities, such as incorporating the Initiative to already existing policy discussions, legislative sub-committee meetings and other reform efforts. By sharing tangible examples of how the Initiative can be used to impact policy and program design, partners and other advocates will see where they can apply it in their work. Given the tough budget situation in most states, a multi-level strategy to hold the line on current legislation and policy could include advocating for no-cost policy and programmatic changes. Reaching the goal for long-term policy change will be achieved by incremental wins that move the national economic paradigm from a posture of helping elders reach a minimal level of subsistence to achieving the shared goal of becoming economically secure.

The Initiative's success to date, is in large part due to the capacity of WOW's leaders to build productive relationships, develop well-positioned champions, be responsive to stakeholders needs, ongoing communications, consistent messaging, and providing quality technical assistance, skill-building and resource sharing to help ensure the success of their state partners. The next stage of the evaluation already underway is the implementation of tracking tools to measure data and summarize outcomes for key components of the Initiative. A final evaluation report will demonstrate the impact of this important multi-year effort to stakeholders, funders, and potential supporters.

The following lists lessons learned under each major category of the Initiative, organized by WOW's key goal statements for the strategic evaluation plan. If you are interested in reviewing the full report, please contact WOW directly.

SUMMARY OF LESSONS LEARNED

ORGANIZATIONAL CAPACITY BUILDING

MANAGEMENT SKILLS: Develop a set of administrative, organizing, and management skills.

- After the pilot experience, it became evident that a more comprehensive, formal request for proposals and contract process was important to ensure states fully understand the commitment they are making and the expectations of state partners and WOW alike.
- The experience gained from piloting the Initiative led to the establishment of an administrative structure which allows for more efficient expansion in other states.
- A formal communication and training strategy expresses WOW's commitment to providing real-time information and technical assistance and provides on-going support for lead state organizations.
- The establishment of technical systems and well documented strategies enables WOW to make improvements in implementation assistance with each new wave of states.
- Mission alignment is critically important to understanding the intrinsic value of the Initiative as the funds provided are not meant to cover the total cost.
- Building capacity at the state level is dependent on the state partner's ability to build relationships, embrace new skills and adapt old skills to a new framework of economic security for elders.
- The ability of state partners to fulfill critical roles and responsibilities has varied significantly.
- State partners benefit from interactions among themselves to increase cross-pollination of ideas, sharing of best practices and practical problem solving.

TECHNICAL SKILLS & CAPABILITIES: Promote professional and skill development related to advocacy and organizing.

- Due to the wide variance in state partner experience, technical systems, and local practice standards, WOW has devised multi-dimensional communications and training approaches while trying to prevent information overload for already busy state partners.

LEADERSHIP: Build a cadre of people in appropriate leadership and staff positions.

- Create a national advisory board consisting of members with aging field and/or academic research expertise; national networks to help disseminate the Initiative; temperaments to champion the Initiative; and experience to advise WOW on methods that ensure credibility will be attained on all fronts.
- National advisory board members readily joined the Initiative because WOW was able to convey the importance of the Initiative in changing elders' lives using scientific data and an approach that would challenge the current philosophy of poverty based on the Federal Poverty Level.
- Managing a national effort with multiple state partners using a very small staff requires open communication, building systems to streamline repetitive functions, capitalizing on each team member's skills and creativity, and fostering ownership through shared growth and recognition for jobs well done.
- While WOW balances national mobilization for the Initiative while providing technical assistance to state partners, establishing common understandings and setting clear expectations is vitally important to all partners, both at the national and state level.

- WOW shares information with state partners that is well vetted with staff and board members, and then clearly communicates the decision and its rationale to state partners.

STRATEGIC PLANNING: Incorporate ongoing strategic planning capabilities.

- Strategic planning requires piercing clarity about the critical elements that lead to success and what can reasonably be done with available resources.
- The development of state lead organizations' strategic visions and workplans have to balance the short-term task-oriented goals with a long-term focus of impacting changes to improve elder economic security.
- The Initiative provides lead state organizations considerable flexibility with a defined structure. States clearly feel that they drive the creation of their state's policy agenda; therefore, it is important that WOW communicate their role and expectations regarding the state agenda.
- WOW recognizes that states have different priorities, yet aims to garner state support for WOW's national positions on issues. When WOW takes a national position or expresses an opinion on an issue, states do not always have to agree with or support it.
- By clarifying their role with partners post-launch, WOW can help turn the attention of the state partners to the longer term goals and outcomes.

SUSTAINABILITY: Develop fundraising capabilities to support sustainability.

- Given the challenge of fundraising essential for achieving sustainability, WOW provides an expert who assists state partners in developing a fundraising plan.

ORGANIZING AND COALITION BUILDING

- WOW can help states understand the importance of partnering with national and other state's efforts in post-launch activities by stressing coalition-building and maintenance activities as key priorities to further the goals of the Initiative.

PARTNERSHIP DEVELOPMENT: Identify state partners with the capacity to carry out a statewide multi-year advocacy and organizing initiative and political environments conducive to aging policy and program change.

- Early experience with state partners has provided WOW with a list of key criteria to consider when selecting future state partners.
- WOW has built a process for annually reviewing states' progress. When this review reveals that a state partner is failing to achieve their goals, WOW may want to consider a plan for remedial action or replacement.

PRINCIPLES OF PARTNERSHIP: Grow national and state coalition with membership that is based on inclusivity, diverse representation, and a commitment to ongoing recruitment.

- The bedrock of coalition building is establishing strong collaborations and partnerships from which will emerge a cadre of individuals and organizations for coalition membership.
- The success of the Initiative requires a careful balance between maintaining a national focus and building ownership for the Elder Index among state partners and state and local stakeholders.
- Coalition building hinges on relationship building, inspirational leadership, planning for some early, easy wins, and finding common ground for meeting coalition partners' needs.

- WOW and the state partners are exploring additional ways to build state coalitions in terms of recruitment, retention, and involvement.
- The early activity of WOW and the state partners has been focused on the development of the state-specific Elder Economic Security Standard Indexes (Elder Index). Many assumed that it would be easier to involve more stakeholders once the Elder Index was launched. In some cases, this was true – a number of stakeholders did not sign on until they saw the actual data of the Elder Index. However, there are those who understand the need for the Initiative and supported the effort early on. The state partners learned that different stakeholders will become engaged at various points in the process. It's important to keep reaching out to different stakeholder groups for their potential involvement, to nurture those early supporters, and to continuously work to establish new relationships. State partners are encouraged to conduct outreach activity, identifying and nurturing relationships with mission-aligned organizations.
- Early participation of a variety of stakeholders, some of whom may become active coalition members, is essential to the long term success of the Initiative.
- A huge challenge in coalition building is securing partners that will commit time and effort to the cause.
- A successful approach to engaging busy people is to provide Elder Index data that is directly applicable to furthering the cause of potential coalition members.
- Overcome geographic barriers to convening the coalition by using a variety of creative outreach tactics.

COLLABORATIVE LEADERSHIP: Select collaborative leaders, be flexible, and balance big picture and on-the-ground implementation.

- Building the knowledge and leadership skills of the state partner coordinators while allowing the customization of the Initiative to their state's needs is critical to deepening the coordinators' commitment and ownership of the Initiative.
- The most effective leaders seen in state partners' organizations are those who find creative ways to make the Initiative and the Elder Index pertinent and functional to special interest group's mission and focus.
- WOW and state partners must learn how to navigate the politics of situations that may arise because the Initiative is entering territory other groups see as theirs.
- State partners need to clarify the roles and expectations of coalition members before and after launch.
- Ongoing communication about progress as well as periodic meetings is important to sustaining advisory board and coalition member's involvement.
- New states will gain efficiencies and avoid the pitfalls of their predecessors when successful leadership approaches and effective tactics for convening and communicating with potential coalition partners are shared.

SUPPORT FOR CHANGE: Capitalize on the National Advisory Board, statewide coalitions and other organizations as appropriate for operational support, effecting change in their venues, coordinating across groups to use resources well and share learnings, further policy agendas and increase awareness about the Initiative and elder economic security issues.

- Advisory board members with national contacts who are respected in their fields can help raise awareness of the Initiative through the presentations, publications and the influence they bring in their networks.
- Cultivating the interest and support of national organizations with state and local affiliates has proven beneficial to state partners.

- Finding and engaging champions with different spheres of influence are critical to getting the attention and support of others and vice versa – the Initiative offers data to support others' initiatives at a level of detail never seen on a national scale before.
- State partners utilize the data, materials and tools to make the Initiative relevant for their stakeholders.

COMMUNICATIONS AND MESSAGING

ROLLOUT: Introduce the Initiative to target audiences and encourage its use in program and policy change.

- To show the relevance of the Initiative to various audiences, targeted messages that resonate locally are the most effective.
- Embargoing materials for a future release date is a practice that is honored by media and can provide reporters time to digest the materials from the Initiative.
- Statewide organizing and the Initiative launch process has improved for each consecutive state because the lessons learned and best practices from previous launches are captured in the State Toolkit.
- Less is more – presentations are most effective when they target a specific audience, pinpointing the key points simply and powerfully.
- A secondary, yet equally important, audience is the academic community and policy wonks but they require more detailed data-driven reports and research articles.

MEDIA COVERAGE: Garner more media attention and broader coverage in more diverse arenas.

- National efforts to attract media attention, drawing on WOW staff expertise as well as renowned champions and spokespersons, generates a snowball effect among the media as word of the Initiative spreads.
- Mediagenic training helps lead state organizations learn to work effectively with the media, structure successful events and attract media attention.
- Step up the use of digital media to create an integrated media presence and reach more audiences, such as Boomers.
- Capture media attention by conveying a definite point of view and taking a stand.
- After the Initiative is launched, the next challenge is to cultivate long-term media relationships and continue to find “new” news.
- Quality indicators for press coverage go beyond the number of media hits to document the reach and the influence of the media outlets.

RAISE NATIONAL AWARENESS: Increase public awareness of guiding principles and key messages about improving economic security for elders.

- The Initiative includes tools to inform the national debate on the central issue -- achieving economic security for elders.
- Use social marketing principles to change the public's awareness of the difficulty elders have making ends meet and to call attention to how income supports are not achieving the desired results at the state and national levels.

PUBLIC CREDIBILITY: Sponsor or participate in credible public forums for WOW to promote recommended policies and practices that benefit families and seniors.

- Dissemination of pertinent data from the Initiative through other organizations' public forums is an efficient mechanism for reaching a large number of advocates and supporters in the field of aging.

RESEARCH: ELDER INDEX AND SUPPORTIVE TOOLS

ACCURACY: The Elder Economic Security Standard Index is accurately tabulated and released in 20 states.

- The accuracy of the Elder Index is assured through a rigorous development process that includes collaboration between Gerontology Institute, WOW and state partners.
- Access to other researchers and field specialists, particularly those on WOW's national advisory board, has provided a sounding board and reference source for improving the methodology and producing a credible tool.
- Good communication is important to successful development of each state Elder Index, influencing how smoothly and quickly the Elder Index is released on a state by state level.
- The complexity of the state-specific development process has become more efficient as the Gerontology Institute had more experience with the work flow, data sets and state-specific issues.

STANDARDIZATION: The Elder Index methodology is standardized across all 20 states and for the national database.

- The goal of the standardized methodology is state-to-state comparability, recognizing that some state's situations will require critical adaptations.
- Field testing and methodological adaptations learned from the pilot states were applied to the tool development in consecutive states showing a commitment to continual process improvement.
- The pilot has been extended to complete the final Elder Index methodology, including representation from all geographic regions across the United States.

IMPLEMENTATION TOOLS: WOW provides reports, factsheets, resources and guidelines to state partners on how to implement the tools of the broader Initiative.

- WOW provides "camera-ready" templates for states' to customize and asks state partners to share the materials they produce with each other.
- Engage stakeholders in materials and messaging customization process to build ownership and support.
- Additional tools, such as the state-specific "Policy Brief," model the impact of income supports on the economic security of elders and illustrate the power of using the Elder Index for advocacy and policy work.
- The persuasive power and practical application of the Elder Index will be significantly enhanced by WOW's ability to quantify the number of elders at or below the Elder Index's benchmark of income adequacy.
- Some state partners need help to effectively use the Elder Index in direct service applications.

ADVOCACY GOALS AND LESSONS

BROAD SUPPORT BASE: Mobilize a broad base of support among the special interest groups and policymakers including dissimilar and unusual allies.

- Cast the net widely to mobilize a broad base of support among special interest groups and policy makers, including dissimilar or unusual allies.
- A proven way to engage special interest groups include finding and filling needs of target audiences using relevant data from the Initiative and its products. Involving organizations that serve those who do not traditionally qualify for income supports is a promising strategy.
- WOW aims to get non-traditional allies and diverse stakeholders on board and encourage state partners to do the same.
- Sharing ownership of the Elder Index and its information-rich resources advances the Initiative in unexpected ways.
- The broad scope of the Initiative offers a new way for lead state organizations to mobilize agencies that serve seniors to advocate for better programs or policies.
- Politically savvy lead state organizations that are prohibited from lobbying have learned to partner effectively with other organizations without these restrictions.
- Some state partners are not clear about the distinction between lobbying and advocacy and are not clear on what activities are legally or organizationally allowable for them.
- Lead state organizations with highly developed networks of aging organizations find advocacy efforts easier and are in a position to jumpstart the Initiative in the state.
- Find a champion with some influence or power within the agency – or who has the ear of the head of the department or agency – and work closely with them.
- Some of the more successful lead state organizations have found powerful advocates among staff and leaders of government agencies and nonprofit organizations in their states. Examples of the type of people who became allies are Paul McCarty, PA Department on Aging; Mary Olsen Baker, MN Department of Human Services; Amy Brenengen, MN Legislative Office of Economic Opportunity; Mike Festa, MA Secretary of Elder Affairs; Glenn Silverberg and Cindy Ofsted, WI Department of Family and Human Services; Drew Walker, MI Department on Aging; and Jacqueline Morrison, MI AARP.

INCREASE PUBLIC DIALOGUE: Increased public dialogue, activism, and use of civic engagement tools to bring attention to "economic security for all."

- The use of civic engagement tools and consumer education activities that are complementary to current efforts will represent a more systematic and inclusive approach to changing the national dialogue.
- WOW is creating a network of national leaders who can tap their state and local affiliates to assist lead state organizations in achieving their advocacy and public policy goals.

CHANGE THE FACE OF ECONOMIC SECURITY: Foster the adoption of the Initiative terminology and taxonomy for "achieving economic security for all" by state and national leaders, service providers, and special interest groups.

- A key challenge to adoption of the Initiative's taxonomy, concepts and messages is the perception that there are cost implications that become barriers in a tough budget environment.

PUBLIC PROGRAM & POLICY CHANGE GOALS AND LESSONS

RAISE AWARENESS: Foster public discussions on elder economic security issues and solutions.

- Be prepared to present Elder Index data at county, state and national levels to provide the data in a manner most relevant to the target policy groups' needs.

PRODUCTIVE DIALOGUE: Facilitate informal and formal dialogue about the issue of economic security for all.

- Be opportunistic –find applications of the Initiative to current issues being discussed in the advocacy offices, state departments, and legislatures.
- Show elected officials how endorsing the Initiative can demonstrate their awareness of elder constituents' economic situation.
- Information from the Initiative can be integrated into already existing policy discussions, legislative sub-committee meetings and other reform efforts.
- To engage narrowly focused special-interest groups, show them how their agenda fits within the Initiative's broader scope.
- Given the tough budget situation in most states, a multi-level strategy to hold the line on current legislation and policy could include advocating for no-cost changes.
- Create buy-in among stakeholders by involving them in the development of state policy agendas.
- Build productive relationships with legislative offices, but make strategic choices about the right person to develop the relationship with in the office.

ENSURE ADOPTION: Foster activities like the passage of a local ordinance, a ballot measure, a piece of legislation, or a legally binding agreement pertaining to economic security and income assistance.

- The way to move the adoption needle forward is to infuse the Initiative into appropriate dialogues, program planning and direct service activities at the national, state and local levels.
- Share different ways (including tangible examples) that the tools and concepts of the Initiative can be used to impact policy and program design to help other advocates see where they can use it in their work.

ENFORCEMENT AND MONITORING: Support activities that focus on holding the line on bedrock legislation and not losing ground.

- Holding the line and not losing ground on existing policy and legislation is concrete evidence of success.

NATIONAL LEADERS FOR CHANGE: WOW and the Initiative aim to become the thought and action leaders in the public arena related to economic security for elders in America.

- It is important to design mechanisms for identifying and documenting the broader usage of the Initiative's concepts and materials at the national, state and local level. This can be challenging when allowing for 1,000 flowers to bloom.
- Long-term change is based on incremental wins that move the national economic paradigm from a posture of helping elders reach a minimal level of subsistence to achieving the universally shared goal of becoming economically secure.

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Formative Research Methodology

The evaluation firm of Holmes Research & Consulting, LLC, (HR&C) of Phoenix, AZ was contracted to work with WOW staff to develop an evaluation plan, document the lessons learned to date, and develop indicators to track achievement of goals and outcomes of the Initiative by WOW and state partners. HR&C's approach to evaluation places high value on providing regular feedback to clients so new ideas, project refinements and course corrections can be made in a timely manner. Timely feedback on achievement of project goals and objectives keeps attention focused on the key determinants of success.

After review of background materials provided by WOW, an orientation meeting was held in March 2008 with WOW's team to brainstorm goals for the Initiative, evaluation focus areas, and targeted outcomes. The evaluation team worked closely with the WOW team to develop a logic model, detailed planning grid, and an evaluation plan. A formative report of preliminary lessons learned with the pilot and Wave II states, and the creation of quantitative data tracking tools and surveys are slated for completion by February 2009. On-going tracking and summative research, including analysis of quantitative data collected over the life of the Initiative, will be completed separately.

The evaluators gathered formative data for this lessons learned report using multiple methods, including in-depth interviews, focus groups, facilitated work sessions, observations from conference calls, and reviews of documentation provided by WOW.

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