October 24, 2002

MEMORANDUM

TO: Alice
FR: Tricia
RE: Encore Surveys

Attached are the copies of the survey instruments that Encore has used. I've dated them, and as you've requested, I've provided a brief summary of why we conducted each survey. The original survey you asked me about - survey of people who did not return - Betty remembered that these questions were asked through face-to-face interviews. She and I looked in our files and we didn't see any survey that seemed to interview specifically people who left Encore. We have done two face-to-face interviews, in 1992 and 1997. The 1997 survey did include some people who had left Encore, so this could be the survey that everyone refers to. Maybe Denis could provide some confirmation on this.

2000 - We wanted to find out if Encore members needed more assistance in stepping forward to teach a class, and we also wanted to gauge interest in expanding programming, get marketing ideas, and get a general profile.

1998 - Member profile/Program idea survey. It was included with the spring/summer catalog supplement mailing.

1997 - follow-up survey to survey conducted in 1992. Two NC State faculty, who served on Encore Research committee, had the idea that they would conduct a longitudinal survey of Encore members to see how participation in Encore impacted their lives. Every 5 years, the two would conduct interviews with members first interviewed in 1992. Unfortunately, this effort has been abandoned since the faculty were never able to get results from the 1992 and 1997 surveys published. This 1997 survey was conducted with face-to-face interviews. I've also included the 1992 survey results.

1996 - The same two faculty members conducted a survey in fall 1996 to determine level of satisfaction with volunteer opportunities. Encore members had shown a low level of interest in volunteer activities promoted by Encore, and the survey did indeed find that the reason for this was a high level of community involvement outside of Encore activities. This survey was passed out in Encore classes during the fall 1996 semester.

As I review all this, I do think it will be a good idea for us to do another survey in the next year or two that will include previous members, solicit program ideas, and provide a member profile.
March 2000

Dear Encore Member:

As you are aware, Encore is a member-driven organization. The committees and staff need your input, and when possible, your active involvement. We appreciate you taking a few moments to fill out this survey, which will help us further develop our programs and understand our members’ interests.

We estimate that it will take you approximately 5-10 minutes to complete the survey. Please return in the enclosed envelope or drop in the survey collection boxes in the Encore classroom or the Encore office in 225 McKimmon.

All information will be kept confidential. We ask for your name and phone number in case we need to ask follow-up questions, but you may elect to remain anonymous by omitting your name from the survey.

Results of the survey will be available in the fall 2000 semester. Thanks for your help!

Sincerely,

Denis Jackson
Director

Chuck Korte
Chairman, Encore Research Committee
Program Development

1. Keeping in mind that Encore is a member-driven program, how important do you feel it is for the Center to provide opportunities for interested (and qualified) members to offer talks, courses, and other types of educational offerings as part of the Encore program?  
   A. very important
   B. somewhat important
   C. somewhat unimportant
   D. very unimportant
   Comments: ___________________________

2. How likely is it that you might at some point be interested in offering a talk, course or other type of educational offering as part of the Encore program? (Note: if you would need tips in preparing for this, assume that the help will be available)  
   A. very likely
   B. somewhat likely
   C. somewhat unlikely
   D. very unlikely
   Comments: ___________________________

3. If you were to want to offer a talk, course, or other type of educational offering as part of the Encore program, what kinds of assistance would you need? (check all that apply):

   ______ meet with an Encore staff member to get some advice  
   ______ meet with an experienced Encore instructor to get some advice  
   ______ attend a single session workshop (along with other interested potential presenters) that would provide help in enhancing the excellence of your offering  
   ______ attend a multiple session workshop (along with other interested potential presenters) that would provide help in enhancing the excellence of your offering  
   ______ have the opportunity to give a single class presentation as a way of preparing for a regular 6 week course (and thereby deciding if you want to offer a 6 week course)  
   ______ other types of help: ___________________________
   ______ I would not need any assistance

4. If you would like to be contacted by the Program Committee about an idea you have for a course or talk that you would be interested in offering as a part of the Encore program, please provide your name and phone number at the end of the survey and tell us your idea for a course or talk here:

   ___________________________

5. Do you know of a community resource (e.g., a society, association, museum, state government office, city government office, hospital, etc.) that might be a good source for Encore speakers or instructors? If so, please provide us with the organization and phone number (if known):

   ___________________________
Possible Expansion of Spring and Summer Programs

6. Do you have interest in taking late spring/summer Encore courses?  Yes  No

7. If yes, please check the month(s) that you think might best fit your schedule:
   May  June  July

8. If yes, which would be of interest to you? (check all that apply):
   Regular six-week Encore course
   Special interest seminar that meets for a half day
   Special interest seminar, with a variety of instructors, that would meet once for an entire day
   Computer course (9 hours; two sessions)
   Six-week course off-site, such as an Encore course taught at a Raleigh Parks & Recreation site
   Evening lecture series (6 one-hour lectures May-July)
   Study trip or special event (half day or one day)
   Other: ________________________________________________

Development of Additional Programs

9. Would you be interested in participating in one of the following special interest groups?
   Theatre/Music Outing Group
   Chess Group
   Book Discussion Group
   Movie Discussion Group
   Other: ________________________________________________

   If yes, would you be willing to help organize one of these groups?  Yes  No
   (if yes, please give us your name and phone number at the end of this survey)

Development of Encore Membership & Committees

10. Do you have suggestions for how Encore can increase its visibility in the community or ideas for attracting members? Please be specific. ________________________________________________

__________________________________________

(continued)
11. Volunteerism is important to the success of Encore. All instructors are unpaid volunteers and Encore committees rely on member volunteers. The Encore standing committees are:
- Budget & Finance
- Program Development
- Research
- Marketing and Publicity
- Membership Development
- Volunteerism and Outreach
- Activities and Services
- Class Host (not a committee, but a volunteer opportunity)

Do you feel that you have a clear understanding of what each of the Encore committees does?  
Yes  No  If no, please circle the committees that are unclear to you.

12. If no, please check any of the following that would be useful to you in deciding whether to join a committee:
- Description of committee’s purpose
- Description of typical projects/tasks
- Specifies on time commitment
- Other: __________________________

Member Profile Information

13. Highest educational level completed:
- High School
- Some College
- Associate’s Degree
- Bachelor’s Degree
- Graduate/Professional Degree

14. Age: 50-59  60-69  70-79  80-above

15. Ethnic Identity:  
- White
- African-American
- Asian or Pacific Islander
- Native American
- Hispanic

16. How long have you lived in the Triangle?  _________________

17. Are you a native of North Carolina?  Yes  No

18. If no, where did you live before moving to NC?  _______________________________

19. In what year did you first become an Encore member?  ___________

20. Are you an alumnus of NC State University?  Yes  No

21. Are you:  
- Retired
- Semi-Retired
- Working Full-time

22. What is your occupation or former occupation?  _______________________________
If you were employed with NC State University, please indicate that.

Do you have other suggestions that you feel would enhance Encore’s programs?

Name _____________________________  Phone ______________________

THANK YOU FOR COMPLETING THIS SURVEY
ENCORE MEMBER SURVEY

PLEASE TAKE A FEW MINUTES TO COMPLETE THIS SURVEY. THE ENCORE STAFF DEPENDS UPON INPUT FROM THE MEMBERS IN ORDER TO PLAN FUTURE COURSES, STUDY-TRIPS, SPECIAL EVENTS AND WORKSHOPS. ADDITIONALLY, WE'D LIKE TO KNOW ABOUT YOU – THE TYPICAL ENCORE MEMBER!

Name: _____________________________ _____________________________ ________ M.I.

Address: __________________________ _____________________________ City _____________________________ State _____________________________ Zip+4

Phone: ( ) _______________ Birth Date: __________/________/________ Sex: □ M □ F

Retirement: □ Full □ Partial Year Retired: __________ N.C. Native: □ Y □ N

Moved here from: __________________________ Year moved to area: __________

Marital Status: □ Married □ Never Married □ Divorced □ Widowed

Education: □ H.S. □ Some College □ Bachelors □ Masters □ Doctorate □ Law Degree

Names of Colleges/Universities Attended: __________________________________________

Area(s) of specialization/training: (e.g. medicine, marketing)

________________________________________

Key Professional Position(s) - (title and organization):

________________________________________

Avocation or Hobbies:

________________________________________

How did you learn about the Encore Center?

□ Friends □ Newspaper Article □ Group Presentation □ Other (please explain) __________

Community issues of interest to you: (e.g. public education, nursing home care, environment, social causes) __________________________________________

________________________________________

Do you currently volunteer? ______ Yes ______ No ______ Where? __________
OTHER COURSES:
- Estate and Tax Planning
- Financial/Money Management
- Foreign Languages
- Folklore
- Mythology
- New World Geography
- Dialects of N.C.
- Other

COMPUTER COURSES:
- Intro to Personal Computing
- Windows '95
- Intro to the Internet
- Advanced Internet
- Microsoft Word
- Excel
- Quicken
- Other

If it is necessary due to the nature of a specific course to schedule it away from the Encore Center Classroom, I would enroll in:

COURSES IN VIDEO CLASSROOM:
- Health Insurance & Long Term Care Options
- Nutrition & Wellness in Later Life
- Combating Ageism
- Food Safety for Seniors
- Modifying Your Home Environment for Your Later Years
- Caregiving
- Pre-Retirement Planning
- Communication Skills for Conflict Resolution
- Other

OFFSITE COURSES AT:
- Museum of Art
- Museum of Natural Sciences
- History Museum
- N.C. State University Visual Arts Center
- Other

The following is a listing of study trips which could be developed if there is sufficient interest. Each would be preceded with a classroom course with the exception of the first two listings.

- **SEPT. 27-OCT. 2, 1998 - WASHINGTON, D.C. IN CONJUNCTION WITH THE CLOSEUP FOUNDATION**
  Seminars, speakers, capitol visits, area attractions offered by the Close Up Foundation in cooperation with AARP. $680.00 (transportation to D.C. extra).

- **EARLY OCT. 1998 - FALL ADVENTURE LEARNING**
  In conjunction with the Betsy-Jeff Penn 4-H Center. Tuning in to our natural environment by day trekking in the scenic Raleigh-Hanging Rock State Park area. Dormitory housing, hot showers, skilled counselors, prepared meals.

- **LATE OCT. 1998 - HISTORIC BATH, EDENTON AND NEW BERN**
  An overnight study trip to historic towns that served as colonial centers of commerce, society and politics.

- **JANUARY, 1999 - NEW ORLEANS: A SOUTHERN LITERARY LANDMARK**
  A city that inspired and nurtured many authors including Faulkner and Tennessee Williams. A several day trip accompanied by Dr. Jim Clark.

- **SPRING, 1999 - IN PURSUIT OF MOZART**
  A study of music and Mozart in Vienna, Salzburg, and Prague. A ten-day trip accompanied by Dr. David Greene.
☐ LATE SPRING, 1999 - COASTAL ECOSYSTEMS
Focusing on the Bald Head Island area - with Dr. Lundie Spence

☐ OCTOBER, 1999 - ST. PETERSBURG, RUSSIA
It's history, culture and arts - with Elena Varshavskaya (formerly with the renowned Hermitage Museum in St. Petersburg).

☐ AUSTRALIA

☐ ENGLAND / IRELAND / SCOTLAND

☐ BERLIN REBUILT

☐ BELGIUM (eco-tourism)

☐ YOUR SUGGESTION(S)

Of previous courses you have enrolled in, which one(s) would you most like to have repeated?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

Which day of the week/time of day do you most prefer to attend classes?

☐ Monday
☐ Tuesday
☐ Wednesday
☐ Thursday
☐ Friday

☐ 9:00-10:30
☐ 10:45-12:15
☐ 1:15-2:45
☐ 3:00-4:30

Encore is your program – please let the staff know what we can do to improve the quality. If you have suggestions for changes and/or additions, please list below:

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

Date: ____________________ Signature: ____________________

02/98
ENCORE EVALUATION STUDY: 1997 Follow-up Study

Interviewee

Date

BACKGROUND

[Indicate: female male/// white black /// other:__________]

What changes have occurred in your life since we interviewed you in 1992?

What is or was your principal occupation?

Marital status

No. of Children?

No. of Grandchildren?

How would you rate your health? excellent good fair poor

How is your health compared to 1992? same better worse

If changed since 1992, explain why:

Year of birth

Education

How would you rate your financial situation?

comfortable adequate limited

How is your financial situation compared to 1992? same better worse

If changed since 1992, explain why:

1. Are you still involved with Encore [as a member or as a participant]? YES NO [skip to page 3]
IF YES:
2. What different Encore activities have you been involved in during the past twelve months? (Ask which specific activity, how often done)
   one-time activities (colloquium, field trip, special events)

Encore class

social activities

serving on an Encore committee

teaching a class, special event

other activities

If married: Do you do (have you done) any of these activities with your spouse? If so, which ones?

3. What are the main reasons that you participate in Encore? What are the main benefits from your participation? [Prompts: intellectual stimulation, social contact, staying active, getting help with practical problems] [Distinguish general from program-specific benefits]
4. How would you evaluate your experience with Encore? How satisfied or dissatisfied are you? What are the positives and negatives of Encore for you?
   [Follow-up benefits/reasons mentioned in #3]

5. Do you feel the benefits you have derived from Encore have changed during the time you have been involved with Encore?

   - Has your level of satisfaction with Encore changed? If yes, please describe.

6. Do you wish that you had done anything differently over the past five years in terms on your Encore involvement?

7. Do you expect to stay involved with Encore? YES NO
   If YES:
   for how long?
   do you expect your involvement to remain similar to what it is now or do you expect to add or drop some Encore activities?

   If NO:
   when do you plan to drop out of Encore?
   why do you plan to drop out of Encore?

   would there be any changes that would keep you in Encore?

IF NO (to Question 1):
8. When did you drop out of Encore?
9. What are the main reasons why you are no longer involved in Encore? How did you decide to drop out? What were the circumstances?

10. How likely is it that you would get involved in Encore in the future? What might make it more likely that you would get involved again?

11. If you were involved again, what Encore activities would you be most likely to participate in?

ALL RESPONDENTS:

12. What would you like to see Encore doing that it is not doing now? What changes/programs would you suggest?

13. Do you feel Encore is doing enough to serve older adults with various limitations, e.g., mobility, income, hearing, sight problems?

OTHER ACTIVITIES

14. Are you retired?
   If so: how long have you been retired?
   any involvement still with your work?
15. What are your major involvements, activities, and time commitments? 
[Prompt: organizations, church, clubs, work, leisure, volunteer work, personal projects, care-giving, family, travel, hobbies, reading]

- Which of these are of greatest importance or centrality to your life right now? [Try to get a rank ordering of the top three]

1. _______________________
2. _______________________
3. _______________________

16. Some people feel that the retirement years are a time when there may be uncertainty or conflict about what your main responsibilities, activities, and purposes ought to be. For example, it may be hard to decide on your priorities, or to find sufficient purpose or value in what you do, or that you are involved in too many or too few activities. Have any of these problems occurred in your retirement years?

- If yes, please describe each problem, when it happened, how long it lasted, how it was resolved (or not), and if the problem is still present, whether things have gotten better or worse in recent years (last five years)?

17. How would you characterize the current level of your satisfaction with your life right now?

[ ] very satisfied
[ ] mostly satisfied
[ ] mixture of satisfaction, dissatisfaction
[ ] mostly dissatisfied
[ ] very dissatisfied
- what are your reasons for feeling this way?

18. Is your present stage of life different from what you thought it would be like? Better or worse in some ways?

19. Do you feel other people's attitudes toward you, expectations, ways of treating you are different because of (or is effected by) your age?

   if appropriate: (same question) ... and different because you are retired?

SOCIAL NETWORK

20. Who else lives with you?

   Any family nearby?

   How frequently do you have contact with your family?

   How long have you lived in Raleigh?

   Any changes in any of these areas since 1992?
21. Do you have family relations that you would characterize as close and supportive? Which ones? Any changes since 1992?

22. Do you have friendships that you would characterize as close and supportive?

- do you have a confidant? How many? What do you do with this person [these people] and how often?

- have your friendships/confidants changed since 1992?

- if you have gained new important friendships in recent years, how has this come about?

23. if you have moved in the past 5 years, how did you go about developing new friendships in the new locales?

24. Has your Encore involvement been of any significance in terms of making new friends?

- if yes: how many friends would you say you have gained through Encore? Have you seen any of them outside of Encore settings? If so, how many?
25. If still an Encore member, do you expect your involvement with Encore will be significant in the future in the making of new friends?

26. Have any other parts of your social network changed much in recent years? Gains or losses? If yes, why?

THANK RESPONDENT FOR PARTICIPATING

ASK IF PARTICIPANT WOULD LIKE COPY OF REPORT DESCRIBING SURVEY RESULTS

Duration of interview (minutes): __________________
SHORT SURVEY

Encore Research Committee
Fall, (1996)

Research is an important function of Encore. We seek to continually improve our own programs by research but we also act to gain more knowledge of the enrichment of the lives of older adults and to share that knowledge with others. One important question concerning older adults is how much their increased longevity, their better health, and their greater education contributes to the community. For that reason we are asking these questions about voluntary activity. We do not wish to know your identity. All responses are anonymous.

Encore Research Committee

1. Please list the volunteer activities in which you are engaged at present. For each, please indicate a) what you do, b) the type of organization (e.g., church, service club, school, social club, political group, on your own), c) the average number of hours per month, and, if applicable, d) the persons or groups served by your action:

<table>
<thead>
<tr>
<th>What you do</th>
<th>Organization</th>
<th>Hours/month</th>
<th>Persons served</th>
</tr>
</thead>
</table>

2. How would you characterize your volunteer work at present?

| ________ | I am doing more than I would prefer | ________ | I would like to be doing more than I'm presently doing |
| ________ | ________ | ________ | ________ | ________ | I'm doing at present is just right |

Please explain why you feel this way: