

Leadership Training for Older Persons Program

**Turning Underserved Midlife and
Older Adults into Community Leaders**

A Replication Guide

**Designed and Implemented by
The North Carolina Center for Creative Retirement
The University of North Carolina at Asheville**

**Co-sponsored by:
Buncombe County Council on Aging
Land of Sky Regional Council
YWCA of Asheville**

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This manual is designed to serve as a guide for individuals or organizations interested in replicating a program similar to the Leadership Training for Older Persons (LTOP) Program that was developed at the North Carolina Center for Creative Retirement (NCCCR), a lifelong learning, leadership and community service organization of the University of North Carolina at Asheville. The purpose of the LTOP program is to enable underserved people 50 and over to gain the skills and confidence to become advocates for the needs and wants of their peers. We have attempted to share our process and experiences including both the successes and challenges met along the way.

Background Information

The first LTOP program was designed and offered through the NCCCR in the spring of 2002 with funding from the Community Foundation of Western North Carolina and co-sponsorship of the Land of Sky Regional Council's (LOSRC) Area Agency on Aging (aaa). The seminar portion of the program was loosely adapted from the Community Leadership Project Curriculum developed by the Topsfield Foundation, Inc. headquartered in Pomfret, Ct. In 2002, 24 participants completed the training and participated in self-initiated community service projects. LTOP participants were generally low-income and minority individuals aged 50 and older. They were primarily recruited from the multi-county Foster Grandparents and Senior Companion programs, part of the Corporation for National Service's Senior Corps.

The LTOP 2004 program was launched thanks to a competitive grant awarded under the National Council on the Aging (NCOA) "Wisdom Works" initiative funded by the MetLife Foundation. The NCCCR again partnered with the Area Agency on Aging and invited other cosponsors including the YWCA of Asheville and the Buncombe County Council on Aging. Once funding was secured, a Program Coordinator was hired in June 2004 to initiate the program. Once again, underserved older adults, both low income and minorities aged 50 and older were recruited to participate in the training. Weekly class sessions began in September 2004 and community projects were chosen and begun in October. An optional basic computer literacy program was also offered beginning in October for those LTOP participants who wished to acquire this added skill. A "Beyond Beginner" computer literacy course was offered in April 2005 for those wishing to further their skills. This component was funded by Smith Barney/Citigroup.

In what follows, we will outline the steps taken to create and implement the program and indicate possible variables and challenges. Our hope is that this program, which has produced positive outcomes in western North Carolina, might serve as a model that can be adapted and modified for use in other regions.

Program Design

When designing a leadership program for underserved seniors, factors that should be taken into consideration, include:

- Identifying program objectives and the ideal size of the targeted audience

- Determining and securing necessary funding and drafting a comprehensive budget
- Coordinating staff responsibilities
- Establishing the length and location of the program
- Planning publicity and recruitment strategies
- Developing or adapting the curriculum
- Recruiting presenters – paid or volunteers
- Inviting co-sponsorships for covering additional costs for lunches and refreshments
- Organizing complimentary programs such as computer training
- Designing both a short term and a terminal evaluation process

Identifying Program Objectives and Target Audience

Many communities offer a variety of formal and informal leadership programs. However, it was our observation that in Asheville adults aged 50 and older from low income and minority communities were often overlooked as a population with leadership potential. In conversation with a planning committee established in 2002, we found a definite interest among an underserved group to acquire leadership skills and the means to implement them. The success of the LTOP 2002 program led to LTOP 2004 and a chance to incorporate new ideas that emerged from that program. Our intention was to provide a safe environment for these citizens to learn and practice skills that would later allow them to become leaders in community organizations that rarely include representatives from among the very communities they serve. LTOP 2002 participants helped make us aware that low income and minority adults are knowledgeable about the dilemmas faced by their peers in maintaining independence, staying connected with society, and preserving their dignity. However, their voices are rarely heard among those planning to meet their needs. We wanted to provide them with a program that would allow them to play a larger role in advocating for the health and welfare of people in their neighborhoods and the larger community.

Securing Funding and Establishing Overall Budget

NCCCR funded LTOP 2002 and 2004 through a combination of grants and donations from local organizations, and with in-kind time allocation of NCCCR staff. Sources of grant funding may include local community foundations, civic associations, and foundations interested in programs designed for minority and low-income populations. Lunch time meals, which we deemed important to fostering closeness among participants, were funded during the 6-week classroom portion of the training through gifts from local churches and civic organizations.

The overall budget for the 2004 LTOP program was \$26,500.00. Cost for conducting LTOP will vary depending on volunteer vs. paid staffing, volunteer vs. paid presenters, length of the program, whether complimentary programs such as computer training are included, resources provided to participants and whether lunches or transportation will be included. We determined that over 800 volunteer hours were donated during the LTOP classes and for community projects.

The following areas will need to be considered in order to create a budget.

Personnel

We hired a temporary Program Manager to coordinate the program. She was hired to work at 40% time for one year. We used in-house secretarial support and current administrative staff for oversight. The secretary spent approximately 5% of her time on LTOP during the first six months. All speakers volunteered their time. An organization may find that it is able to implement the program with existing staff and volunteers. If this option is used, considerations must be made in the existing employees work schedules. We found that during some weeks the Program Manager worked over thirty hours and during others, less than ten. Her activity varied with different stages of the program.

We hired a consultant with a background in social anthropology to evaluate the program. This individual was paid \$1,200 for her services.

Printing and Supplies

Printing costs included the brochures and flyers we used for recruitment and the handouts that participants received throughout the six weeks of classes. Each participant received a 1.5” binder that was filled by the time the classes were completed. We spent approximately \$500 on printing costs, notebooks, and a few educational supplies for participants.

Gifts were purchased for each graduate of the LTOP program. We gave them a UNCA coffee mug with their certificate of completion. The mugs cost \$4.00 each.

Food

We provided morning and afternoon snacks for participants during the class sessions and paid for their lunches in the campus cafeteria. We were able to cover some of the costs of lunches with donations from local churches and businesses. Lunches cost \$5.50 each. We had a recruitment ice cream social and a “wrap” party to celebrate our success. The snacks and party food costs totaled approximately \$400.

Mileage

The Program Manager traveled to four surrounding counties to meet with community organizations that could assist with recruiting participants. She also traveled to sites where the teams were conducting their projects. Mileage will vary based on the amount of territory an organization is recruiting from and serving.

Postage

Postage expenses were related to mailing out applications and acceptance letters, communications with volunteer speakers, and thank you letters. We spent approximately \$100 on postage.

Office Supplies and Telephone

Office supplies and telephone expense were minimal and totaled approximately \$100.

Developing Staff Coordination

The coordinator specifically hired for this project had previous experience with older adults, program management, and volunteer coordination in nonprofit organizations. This allowed her to work autonomously with minimal supervision and guidance from the NCCCR Director. She was hired for a one-year period at 40% time, which proved adequate for the duties

required. During the year there were times when the Coordinator worked almost full-time and other periods that required only 8-10 hours/week. The Coordinator was hired 3 months prior to the time that classes were to begin for purposes of recruiting participants, conducting program design, developing or refining the curriculum and recruiting and scheduling guest presenters. An NCCCR Office Assistant provided assistance with clerical duties and 10% of her time was allotted to LTOP.

Establishing Length and Location of Program

Length: The entire period of time for the LTOP program from design through evaluation was 1 year. Planning and coordination began in June of 2004 with classes beginning in September. The classroom portion of the LTOP program lasted six weeks with participants attending classes from 10AM until 3PM one day per week. After the leadership classes were completed, a six-week intergenerational computer mentoring program was offered to those interested, which lasted from mid-October through late November. Community project teams were formed at the end of the leadership classes and teams worked independently on their projects from October through mid-December with the option of continuing longer if they so desired. Volunteer mentors drawn from the NCCCR membership provided assistance to each project team as needed. Evaluation of the impact of classes and projects were undertaken in the winter and a second computer mentoring class was offered in the spring. An overall evaluation of the program was completed in the spring of 2005. This time frame worked well for Asheville as we avoided classes or project work in inclement weather.

In retrospect, we believed that a classroom portion that lasted eight weeks, instead of six weeks, would have better served the program. Additional sessions would have allowed a more relaxed pace, more complete coverage of the curriculum, and more time for bonding between participants.

Location: The leadership classes took place on the UNCA campus in the newly constructed student union building. Space was needed for participants to easily see and hear the presentations as well as have space for small breakout sessions. The room provided to our LTOP class proved to be challenging for presenters and participants, as the acoustics and shape did not facilitate communication. It is recommended that the classroom have excellent acoustics as many midlife and older adults have some degree of hearing impairment. The room should accommodate class configurations that ensure all participants can easily see visual aids and be able to break into small groups with enough space in between to facilitate small group conversations.

The advantage to having the classes in the student union was the easy access to the campus dining facility. The class members said that they enjoyed sharing their “college experience” with undergraduates with whom they sat during lunch. Having lunch together was invaluable for promoting fellowship and exchange of ideas, and was a plus for underserved adults who cannot afford to dine out. For many, this was the first time they had been of the UNCA campus, though they had lived in the community for many years. The campus atmosphere fostered the learning experience by exposing the participants to the academic environment and allowing them access to the events that were happening in the student union. During one of the classes a volunteer representative from the NCCCR’s College for Seniors program explained the educational and social opportunities for older adults that were available with membership to the NCCCR. LTOP participants were given the opportunity to join NCCCR

for a reduced membership fee and advised on how to apply for scholarships for classes. For those participants who decided to join the NCCCR after completing the LTOP training, they also received access to UNCA library services and receive discounts for campus entertainment and cultural events.

The advantage of having lunch in the campus cafeteria must be weighed against the problem of getting everyone back on time for the afternoon session. Parking on campus also proved to be a challenge and participants were shuttled from the parking lot of the NCCCR to the student union.

Planning Recruitment and Determining Number of Participants

The 2002 class participants were almost exclusively recruited from the Foster Grandparent and Senior Companion Programs administered by the local Area Agency on Aging. Recruitment for the 2004 class proved more challenging. The goal was set at 35 participants and efforts to recruit them began three months prior to beginning the program. Diverse strategies were utilized and 32 participants were recruited by the cutoff date of 2 weeks prior to the beginning of the program. Some of the strategies included:

- Holding an ice cream social as a reunion for LTOP 2002 participants who were encouraged to invite a guest who might be interested in enrolling in the new LTOP class.
- Creating and distributing flyers and brochures to local churches, senior centers, NAACP office, senior housing facilities, neighborhood associations, affordable housing coalition office, congregate meal sites, Habitat for Humanity, YWCA, YMCA, African American cultural center, and Latino advocacy coalition meeting sites. Appointments were made whenever possible for face-to-face contact.
- Distributing press releases to newspapers in 4 surrounding counties.
- Placing articles in the NCCCR newsletter and website and the newsletters of partnering organizations to promote the program to their membership.

The most successful recruitment efforts were those utilizing partners to recruit from their client base and former LTOP students who recruited their friends. Approximately two-thirds of the 2004 participants were found this way. The remaining one-third of the participants were found through the various face-to-face contacts with community organizations, newspapers and key leaders in the community. It is important to remember in planning recruitment efforts that low-income individuals may not access information the way that those with more income might. A personal endorsement from a friend or respected individual in the community can overcome barriers such as intimidation regarding the implications of the term leadership or the expected level of commitment. If an organization is thinking of offering the program for more than one year, one might also consider how recruitment will change after the first few years, as partnering agencies' clients do not turn over frequently enough to have an ongoing supply of new recruits.

The number of participants should be established to account for dropouts and not to have so many people that class participation is compromised. Twenty-five to thirty would be a maximum that allows for adequate question and answer sessions and small group discussions, and facilitates the participants getting to know one another and becoming support networks for each other.

Writing Curriculum

When designing curriculum we wanted participants to gain the information, skills, experience and confidence to: a) represent their peers by serving on boards or committees of community service organizations, b) advocate for disadvantaged older persons, c) access information from local and state agencies to help improve the lives of their fellow citizens, and d) gain skills in computer literacy as a tool for communication and for accessing needed information. In each class session we tried to model how an effective class, workshop, or meeting would be organized. This included staying on time with the use of an agenda, providing proper introductions of speakers, following class-established rules of behavior, having handouts organized, etc. The curriculum was designed to balance learning about community resources and issues with experiential sessions where participants could practice the skills they were learning. Different topics were covered during morning and afternoon sessions. Notebooks were provided to each participant and handouts were provided for each session that would allow them to reference the information after the class. Handouts were color coded to allow for quick identification.

The curriculum for the six weeks of classes follows:

SESSION #1

GETTING TO KNOW YOU (and EACH OTHER)

The entire day's session lead by a professional facilitator

- Introduce class objectives, topics and format
- Talk about work plan/projects
- Provide ways to get to know LTOP classmates
- Identify the skills and qualities of good leaders
- Look at individual leadership skills
- Practice new leadership skills in small groups

SESSION #2

A.M. Session - WORKING TOGETHER

Lead by two individuals with experience in community organization

- Discuss culture differences and their impacts on leadership styles
- View video on 5th City in Chicago and how the community self-organized to revitalize their community
- Discuss the different styles of leadership participants have experienced
- Small group work on developing a 4 step process for a community work day

P.M. Session - LET'S TALK ABOUT COMMUNITY RESOURCES

Lead by representatives of community organizations whose missions included serving midlife and older adults

- Discuss how to access community information and share with others
- Role-play: finding and using community resources

SESSION #3

A.M. Session - THE ABC's OF MEETINGS

Lead by community leaders with experience serving on community boards

- Review the basics of meeting management
- Small group work on planning meetings and setting the agenda
- Learn how to conduct meetings using parliamentary procedure
- Review the roles of people at the table
- Create an agenda for a meeting

P.M. Session - DEALING WITH DIFFICULT PEOPLE/SITUATIONS

Lead by UNCA Human Resources manager

- Explore different personality types and how they work on a team
- Offer tips on dealing with difficult people and situations
- Role play: difficult situations and responses

COMMUNITY SCAMS TARGETING OLDER ADULTS

Lead by attorney working with Asheville Police Department's Victims' Services

- Discuss current community scams and how to say no
- Role play: How to say no
- Discussion of what happens if one presses charges

SESSION #4

A.M. Session - END OF LIFE ISSUES

Lead by Hospice Professional

- Discuss end of life issues
- Question and answer session regarding advance directives
- Role play: how to open a conversation about end of life issues with family and community

P.M. Session - FINDING COMMON GROUND

Lead by a professional mediator from the Community Mediation Center

- Define the nature of conflict and learn how it emerges
- Identify personal behavior styles when dealing with conflict
- Review stages of mediation
- Practice good listening skills

SESSION #5

A. M. Session - HOW TO GET YOUR POINT ACROSS

Lead by former President of Toastmasters

- Learning the art of public speaking
- Learning how to have a voice, be more visible, voice your view
- Practice speaking in small groups and in front of large group with microphone

P.M. Session - LEGAL RESOURCES

Lead by Local attorney specializing in Elder Law Issues

- Learn about the legal issues facing older adults – advance directives, tenant’s rights, Medicare/Medicaid
- Learn how to access free or inexpensive legal aid

SESSION #6

A.M. Session - MAKING A DIFFERENCE/ADVOCATING FOR OLDER ADULTS

Lead by community experts in different arenas of advocacy

- Contacting elected officials –Senior Tarheel Legislator
- How to write an effective letter to the editor – Asheville Citizen Times newspaper
- The Voting Process – Women’s League of Voters

P.M. Session – CELEBRATION AND RECOGNITION

- Lunch and Completion Ceremony – UNCA Chancellor Mullen awards completion certificates

The level of prior experience and formal education varied greatly among participants. We created a curriculum that was challenging, but not too difficult for most, to try to find the learning edges for most of the participants. There were times when the Program Coordinator or mentors did need to provide individual coaching to a few participants. Throughout the curriculum a focus was placed on moving away from a hierarchical leadership style to one that was more of a bottom up circle leadership model.

After each class a simple evaluation form was completed. Participants gave the highest ratings to classes that had a lot of participatory activities. We found that the afternoon sessions need to be lively, as after lunch many of the oldest participants became sleepy. A fifteen-minute refreshment and bathroom break in the morning and afternoon sessions is also recommended to keep the group focused. The amount of material covered in six weeks may have been too ambitious. Extending the program to seven or eight weeks would have allowed for a more relaxed pace and more time for interaction among the participants.

Ratings of Each Class by Percentage of Attendees

	Class 1	Class 2	Class 3	Class 4	Class 5	Class 6	Average
Excellent	68%	61%	71%	56%	82%	58%	66%
Good	26%	32%	25%	36%	18%	26%	27%
Fair	6%	6%	4%	8%	-	16%	7 %

Recruiting Guest Presenters

We were able to enlist volunteer presenters for all of the class sessions. They were contacted and confirmed for the classes two months prior to classes starting. Through contacts at the NCCCR, speakers were recruited for their expertise on the subject matter and for their speaking ability. We found most everyone we contacted willing to serve and enthusiastic about our program’s objectives. The Program Manager coordinated the speakers’ needs for copying handouts and providing for their audiovisual needs. She also advised them on the presentation times, group dynamics and the types of experiential or small group activities that

would complement the information provided during the class. Short bios were requested from each presenter and the Program Manager would provide introductions at each class. In retrospect we would have asked participants to introduce speakers giving them additional opportunities to practice meeting and public speaking skills.

Covering Cost of Lunches and Refreshments

Lunches were provided as part of the program. Each lunch cost \$5.50 and money was donated from local organizations to help cover the cost. As mentioned earlier, participants ate in the UNCA student dining hall, which was located next to the student union where our classes were held. The lunches were very much appreciated by the participants, as this was one less meal they needed to purchase on their limited incomes and they also were able to enjoy an aspect of college life that many had not had the chance to experience when they were younger. Some of the participants used the time to learn more about their fellow classmates and deepen friendships. Others used the time to interact with the undergraduates to share their experience and hear about college life from the younger students. The difficulty handling lunches was trying to get everyone back to class on time. Even though they were given an hour for lunch, many straggled in to the afternoon sessions late. A more efficient way of handling lunches may be for box lunches to be provided.

Organizing Complementary Programs

Community Projects:

Crucial to the success of LTOP was providing an opportunity for participants to practice what they learned in the class sessions. They did this by identifying community projects they would undertake in teams. The Program Coordinator provided some examples of projects and participants were encouraged to work on projects which had a strong interest for them. Mentors were assigned to each team to provide assistance as needed. Teams varied in size from 2 to 9 people. Teams were instructed to complete their projects in eight to ten weeks to prevent them from losing momentum and have experience working with a deadline. They were encouraged to utilize as many of the leadership skills that they learned in class as possible. Examples included creating agendas when they met for organizational meetings, tapping into community resources, networking for publicity, etc.

Some examples of team projects included: Opening up a downtown satellite office for the local Council on Aging, bringing clowns to visit nursing home residents, beautifying a local low income community, creating a home sewing cooperative for out of work textile workers, teaching a consultative leadership style to community organizations and recruiting Foster Grandparents for local schools. Only one of the teams felt that they did not accomplish their goal.

Interestingly, the team that probably accomplished the most difficult task and expressed the greatest satisfaction about their project was a team that worked from a model that was more hierarchical than the others. A leader emerged, delegated tasks, organized the work and set time frames for completion. Although this team worked very well together and enjoyed its work, members did not seem to stretch themselves in utilizing their new skills as much as those that worked on teams that took more of a shared leadership approach. The team that most exemplified circle leadership reported more than the other groups that they had to use the skills of dealing with difficult people.

Computer Literacy Training:

Funding was obtained through the local Smith Barney office to provide computer literacy training to low income and minority older adults. Priority for these classes was given to LTOP participants who were interested in gaining these skills and approximately 60% of the participants enrolled. The classes were held once a week for two hours and offered classes at beginner and advanced beginner levels. Previously trained undergraduate UNCA students taught the classes providing an intergenerational learning experience for the participants. The students were paid a stipend for their work and the classes were free to participants. Instruction covered the basics of using the Internet and word processing. Both the undergraduates and those taking the classes reported how much they enjoyed learning from each other. Many of the participants were able to utilize their computer skills when working on their community projects.

Designing Evaluation Methods

The Program Coordinator began working with an independent evaluator to design the evaluation process prior to classes starting. An individual participant profile and pre and post-program questionnaire were developed. Participants handed in their profiles and pre-program surveys on the first day of class. Post-program surveys were completed on the last day of class. In the future, we would suggest administering the post-program survey later, after teams have concluded their group projects. Six weeks is a short period of time to “measure” change.

Evaluation forms were also designed to obtain feedback for the content of each class and the quality of the presenters. These forms contained a very simple rating system and asked what they liked best and what they would change. A report was also completed by participants at the end of their projects that allowed the evaluator to see which skills that were learned in class were utilized in the “real world” experience of their community project. Evaluation forms were submitted to the evaluator who compiled a comprehensive evaluation using both quantitative and qualitative data.

The evaluator attended a portion of the first class where the participants were asked to introduce themselves by sharing an aspect of their background that helps them in a leadership role, a talent they bring to the group, and what they hoped to learn in the LTOP program. She also attended the graduation ceremony where participants shared a few words about their experience, and a social gathering at the completion of the projects. General questions were asked regarding their experience and the evaluator was able to identify a few participants to interview for in-depth questioning. The evaluator interviewed three participants individually and those interviews were included in the final report. She wanted to interview people who would exemplify a diversity of backgrounds and perspectives in order to narrate how a program like LTOP might fit into the lives of diverse people.

What We Learned

Based on observation, degree of participation, objective evaluation and participant comments, we have determined that LTOP did meet the objectives of providing a safe and structured environment for older adults to learn and practice leadership skills.

Regarding leadership styles, it was evident that some of the participants were more comfortable in a hierarchical model rather than circle leadership. They did, however, express enthusiasm for moving into a shared leadership model, and may just not have had enough practice with this method of working together to understand its benefits. We also believe the circle leadership model is a newer concept to them and one that few have seen modeled in the community.

Women were more likely than men to perceive that they spent a lot of time doing things for community members. What’s interesting here is that in many of the cases, women’s attitudes shifted by the end of the classes, the most dramatic shift demonstrated in their response to the question “People who have had a lot of education are more likely to be better leaders than those who haven’t had the same educational opportunities.” The mean response for women was 2.85 in the pre-class questionnaire and 3.29 in the post-class questionnaire with 1=strongly agree and 5=strongly disagree.

Pre and Post Class Responses to Items Regarding Leadership Behavior

Behavior	Pre-Class report (over past 3 yrs.)	Post-Class projection for next year	Positive Difference
Have/will written a letter to the editor of a paper on an issue of importance to me.	3.24	1.88	1.36
Have/will recommended the services of a community agency to others.	2.03	1.21	.82
Have/will try to solve a conflict that was stopping a group from doing its job	2.9	2.19	.71
Have/will join a committee or group that has a task to accomplish	2	1.35	.65
Have/will spoken to groups to give them information or to get them to do something	2.41	1.81	.6
Have/will volunteer my time and services to a group	1.54	1.39	.15
Have/will taken on responsibilities to assist a community of importance to me.	1.95	1.84	.11

Note: 1=frequently; 2=sometimes; 3=rarely; 4=never

Several participants from the 2002 LTOP program have become involved in advocating for the needs of older adults. One individual now serves as the Chair of Board for the local Council on Aging. Two women from LTOP 2002 have been very vocal speaking about the impact of un-planned growth on their communities during local government meetings. One 2004 LTOP participant has enrolled in clown school to continue the work she started with her community project team bringing clowns to local nursing home residents. Another 2004 participant is co-chairing a local organization whose mission is to advocate for the handicapped. Since completing LTOP he is working with local restaurants to improve access for the handicapped and publicizing how those restaurants that do a good job at this. A woman who participated in LTOP 2004 is applying for acceptance in the year long Senior Leadership Enhancement Initiative with the University of North Carolina Institute on Aging to further her leadership training.

The extent to which LTOP participants continue to integrate their new skills into their lives and the life of the community will be evident over the next several months and years to come. We are discussing the possibility of following up on the participants from both LTOP 2002 and 2004 classes to assess their level of continuing involvement in leadership roles.

The value of older adults from low income and minority communities participating in leadership roles is often overlooked. We believe that with a small investment in training and opportunities to practice new skills, these individuals will add diversity, wisdom, practical experience, and a fresh perspective to decision making and community visioning.

In conclusion, we leave you with several statements from the participants of LTOP 2004.

“I’m a facilitator at the church for the mission team. I wanted to know more about leading and dealing with people. In the leadership program, they had someone come in and tell us about how to deal with difficult people and that was interesting. I have some difficult people on the mission team.”

“If you have intentions of being a leader, you have to keep on learning. The people you’re leading can’t go higher than where you take them and you can’t take them where you haven’t been.

“Being a leader is being able to lead people without coming across as a leader, without being pushy.”

“LTOP was the ignition that got us started.”

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