AGING IN ARIZONA:

A SUMMARY OF ARIZONA GRANTMAKER PERSPECTIVES

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This report summarizes the results of in-depth interviews and focus group sessions conducted in 2012 as part of the AGF Engagement Initiative.

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I. Executive Summary

Arizona Grantmakers Forum (AGF) conducted a formative assessment of 30 Arizona-based funders to understand how they make funding decisions for the communities they serve; how they would envision improving Arizona communities to better support people of all ages; and how the rapidly growing segment of older adults might impact community building. The participants discussed their funding philosophies and how older adults factor into these, or not. They also discussed exhibits showing data about the changing population demographics and growing social impact of older adults in America.

Funder Profiles. The discussions helped to identify four basic “prototypes” of funders whose philosophies ranged from community-oriented, expansive thinkers to distinct program-focused funding organizations. Each type of funder described how they made decisions and what their potential role might – or might not – be in intergenerational, community building efforts in Arizona.

1. **Community-oriented, big-picture-thinker funders** were already supporting community initiatives or have set a strategic direction to embrace a broad community focus for their funding initiatives. If a collaborative community building initiative emerges with multiple funders involved, the leadership for this effort will likely come from this group of funders.

2. **Ready, willing but-not-yet-able funders** indicated that, while their current funding direction has not included older adults, they were shifting their strategic direction to consider community-based initiatives and using the skills and resources of older adults. This group needs more education, networking opportunities, able collaborators, and compelling models for community change that fits their mission.

3. **Grantees-must-take-the-lead funders** agreed that the rapidly expanding population of older adults have talent and skills that could help build communities that serve people of all ages well. This group firmly believes, however, that their nonprofit partners must take the lead in creating the models and making the case for building aging-friendly components or programs into their funding models.

4. **Priorities do-not-include-older-adults funders** have not, nor do they ever plan to fund programs that are designed to help or include older adults unless trusted nonprofit partners make a strong case for using older adults as productive volunteers in their current programs.

Funding Philosophies. Funders’ philosophies fell along a continuum from those with a strict adherence to their founders’ original mandates (thus, funding distinct programs) to those that were exploring more global interpretations of their organizations’ original mandates to those already planning or implementing collaborative, community-oriented projects, some of which were intergenerational in nature. These funders found ways to address community needs while meeting programmatic goals; participate in collaborations with other funders, community organizations, and residents; and incorporate intergenerational approaches into their work.

Older Adults as Potential Volunteers. While many of the funders interviewed do not include older adults in their investments, the idea of using older adults as skilled volunteers to advance the ability of their nonprofit partners to serve their non-aging constituencies caught their interest. The fact that older adults are better educated and have higher skill levels than prior age group makes them a valued asset that many nonprofits benefitting from at this time.

Intergenerational Community Building. Most funders felt that intergenerational community models appealed to a broader funding audience than aging-focused initiatives. Intergenerational models would allow funders with non-aging program priorities to participate while addressing their funding priorities within the context of the larger community initiatives. Some suggested that a philosophical shift is needed to move funders from individual program investments to joining other funders in collaborative systems change models into which their program might fit. Nonprofits also need to take leadership in demonstrating that collaborative community building models can effectively serve people of all ages.
Conclusions and Recommendations. The following conclusions emerged from the conversations:

A. Capitalize on Assets of Aging to Build Community Capacity.

✓ Focus on assets, skills and talents of older adults, not only on the deficits and dependencies. The numbers of older adults available to contribute could offer nonprofits and communities a substantial volunteer labor force.

✓ Establish ways to connect skilled, motivated older adults with community needs. Identifying and connecting the assets of older adults with the programs and organizations that need these assets could show a solid return on the nonprofits’ investment in a volunteer management system.

✓ Educate grantmakers and nonprofits to capitalize on assets of aging. If grantmakers across the state shift their practices to include aging populations in their funded programs as valuable, volunteer assets, all constituent groups would benefit.

B. Incorporate an Aging Lens in all Philanthropic Work.

✓ Every funder is facing the social and economic ramifications of the changing aging demographic. If funders and nonprofits alike could re-frame their attitudes toward older adults as part of their communities’ solutions, not as part of the problems, doors would open for opportunities to maximize the resources of older adults residents.

✓ All funders ultimately touch the lives of older adults, whether they fund aging or not. Funders willing to add an aging lens to their worldview could enrich their organizational partners’ capacity to deliver on their shared goals. Connecting highly educated, aging boomer to programs that need talented, willing help could improve the lives of people of all ages in Arizona.

✓ Older adults are also commandeering a major share of the countries’ economic resources on both ends of the wealth spectrum. The swelling ranks of older adults are living longer, bearing more family responsibilities, and working and/or volunteering later into life – thus wielding more power in all aspects of community life.

✓ Support social enterprise and entrepreneurial efforts to innovate in policy, product and service arenas. New products and services for healthy and chronically ill older adults will allow all to age more successfully and is an economically viable marketing solution.

C. Encourage Nonprofits to take the Lead in Proposing Intergenerational Community Solutions.

✓ Nonprofit organizations are in a pivotal position to move the needle on aging awareness among their funding partners. Trusted grantees that can explain the benefits of older adult volunteers and design credible implementation models will show funders how to get a substantial return on their investment.

✓ Strengthen nonprofits’ ability to successfully propose intergenerational solutions. If nonprofits step up to propose compelling intergenerational solutions for addressing Arizona’s needs, significant inroads to making broad community change could occur.

✓ Educate nonprofits on the characteristics funders are seeking in grantees. Nonprofits will know what skills to develop and what to focus on when justifying their reason for being the winning grantee.

D. Collaboration is Key for Productive Community Building.

✓ When people build community together, they build intergenerational understanding and engage older adults in solving community issues. In addition to building ownership, this will generate better understanding of the need for an educated workforce and more support for funding school initiatives.

✓ Frame the community building conversation as a collaborative process to help people of all ages, not as isolated programs that benefit different age groups. Make the connection between the community’s challenges and their resources to create solutions that community members can own.

✓ Generate a collaborative model for healthy communities with leadership from a small group of funders, nonprofits, government agencies, businesses and citizens to design and build a model that encourages communities to meet their own needs. Reach out to other funders to show how they might fit into the plans and how they can participate while still meeting their funding priorities.

✓ Become involved with existing efforts in Arizona as another avenue to increase funders’ and nonprofits’ capacity and motivation to support community building efforts.
II. Introduction
Arizona Grantmakers Forum (AGF) conducted a formative assessment of Arizona funders about the communities they serve and how the assets of older adults can increase their capacity to better serve their constituencies. As a result of this work and other collaborative initiatives to improve the livability of Arizona communities, AGF hosted a Funders’ Round Table where discussion focused on the research results and future opportunities for collaboration in supporting community building efforts across the state that improve the lives of people of all ages. In 2013, AGF will explore the creation of an ongoing affinity group/learning community of funders, nonprofits and government agencies that develops a shared understanding of what’s needed, what works and what’s possible to enhance the quality of life for Arizona’s older adults.

III. Purpose
Arizona Grantmakers Forum contracted with Carolyn Holmes, PhD, Holmes Research & Consulting, LLC, to conduct one-on-one interviews and focus group discussions with 30 Arizona-based funders to understand how they make funding decisions for the communities they serve; how they would like to improve Arizona communities to better support people of all ages; and how the rapidly growing segment of older adults might impact community building efforts – either by bringing their assets and contributions to bear on community growth, or as community members that have growing needs for care, support and resources.

The discussions served two purposes. Data collection was achieved by asking funders to describe their philosophy underlying their funding decision making and organizational priorities – and how older adults factor into these, or not. After funders described their organizations’ positions, they were shown exhibits with information intended to raise their awareness of the rapid changes in the population demographics and growing social impact of older adults in America. In addition, the exhibits highlighted key facts about the “hale and hearty” majority of those 65 years and older, as contrasted with the small minority (mostly those 85 and older) that are frail, in failing health, and requiring more family and community services and support.

IV. Methodology
The EngAGEment Initiative’s Design Team consisted of eight individuals representing funders from four Arizona-based philanthropic organizations and representatives from the Maricopa Association of Governments, the Arizona Governor’s office, Tucson United Way and a retired foundation director. The Design Team participated in the design of the study and the development of the research questions. They wanted the session to include a dialogue with funders that combined data gathering (on how funders make decisions regarding their target populations and the communities they serve) with information sharing and awareness raising around the needs and opportunities presented by the rapid growth in the older adult demographic.

The discussion sessions with 30 funders were completed in May and June, 2012 using in-depth interviews (n=9) and two focus groups, one in Phoenix (n=9) and one in Tucson, Arizona (n=12). Initial invitations for the in-depth interviews were sent by Marissa Theisen, CEO/President of AGF to 25 Arizona-based funding organizations. The letter was followed by personal phone calls from Holmes to set appointments for the interviews. In Phoenix, the small family foundation affinity group hosted the focus group at their
regular quarterly meeting. The Tucson focus group invitations were issued jointly by AGF and the host agency in Tucson, the Community Foundation for Southern Arizona, and a special luncheon session was conducted.

A. Research Questions
The research questions were developed to encourage an exploration of the funders’ view of their work and the communities they serve. The intent was to explore grantmakers’ opinions regarding the following topics:

- How do funders go about their work and what communities do they primarily serve?
- What efforts have funders undertaken to build community initiatives?
- Where might their organizations fit into growing efforts to build vibrant communities that work for people of all ages?
- What potential benefits would accrue from funding programs or projects that benefit multiple generations?
- How are older adults impact—or are impacted by—funders’ current work?
- How can funders capitalize on the extensive assets and contributions older adults could make to help the communities and constituencies they serve in Arizona?
- In what ways can Arizona Grantmakers Forum help funders to continue learning about the tremendous assets and growing needs of older adults?

B. Respondent Demographics
The four local foundations that financially support and provide leadership via the Design Team to the EngAGEment Initiative already have a strong commitment to and investment in programs and initiatives that serve and/or engage older adults in local communities. Therefore, these organizations are not represented among the respondent group. The purpose of the research was to assess the opinions and activities of Arizona funders that have not had a substantial stake in funding older adults. The 30 respondents represent 37 foundations with combined assets of $1.52 billion and charitable giving in 2010 of $204.62 million. By type, there were 19 family foundations represented, seven public charities, seven independent foundations, two corporation-funded foundations, and one private foundation. The respondents represented 11 funders that were organizational members of AGF.

C. Limitations
Focus groups and in-depth interviews, by their very nature, are intended to capture a range of qualitative views, opinions and experiences of the target population and are a good method when in-depth information and explanatory feedback is needed. No attempt was made to quantify the degree to which the opinions are present in the funder population; thus results from research should be applied to the entire population with caution. Participants were recruited on a volunteer basis, rather than being randomly drawn from the total population of grantmakers in Arizona. Findings reported here represent a variety of viewpoints that emerged throughout the research.

V. Research Findings
A. Funder Profiles
The discussions revealed four basic “prototypes” of funders whose philosophies ranged from community-oriented, expansive thinkers to clearly defined, program-focused funding organizations. Each type of
funder described how they made decisions and what their potential role might – or might not – be in intergenerational, community building efforts in Arizona.

1. **Community-oriented, big-picture-thinker funders** were already supporting community initiatives or have set a strategic direction to embrace a broad community focus for their funding initiatives. They could cite examples of funded initiatives – not just programs – that incorporated the engagement of diverse community organizations, businesses and residents. Some realized that “it takes a village to raise a child...” but had not specifically thought about launching a dedicated effort to capitalize on the talents of older adults and engage them in meaningful community work. Others have purposely included older adults in their programming decision making. Some programs directly addressed the needs of older adults and some programs were engaging older adults in meaningful volunteer positions to increase the capacity of the communities’ nonprofits to better meet the needs of their target populations or the recipients of their funded programs.

- The interest and resources of this group need to be harnessed, focused and coordinated to achieve a whole that is greater than the sum of the parts.
- If a collaborative community building initiative emerges with multiple funders involved, the leadership for this effort will likely come from this group of funders.

2. **Ready, willing but-not-yet-able funders** indicated that, while their funding priorities have not included older adults, they were shifting their strategic direction to consider community-based initiatives. They seek to achieve greater community impact and effect long-term change – and to capitalize on the skills and resources older adults offer. Recognizing the huge social and economic impacts older adults are making in Arizona communities, consideration of their needs and their talents would be an important factor in the funders’ new plans. Some linked their shift in strategic thinking to a desire to grow their organizations, recognizing that greater community visibility would also help them achieve the organizational growth they are seeking because older adults are high-potential donors of their “time, talents and treasure.”

- This group expressed the greatest desire for education and networking opportunities to enhance collaborative potential with other funders.
- They need education, invitations to join collaborative ventures, and exposure to compelling models for community change that fit their mission but expands their vision of what is possible to achieve within the constraints of their funding priorities.

3. **Grantees-must-take-the-lead funders** agreed that the rapidly expanding population of older adults has talent and skills that could help build communities that serve people of all ages well. They also recognize that a growing number of chronically ill and frail older adults will need more support and services from organizations and their communities as the 65+ population expands. The position that sets this group apart from the others is a firm belief that the organizational applicants and their nonprofit grantee partners must initiate the focus on older adults when presenting future plans and writing new proposals. Some in this group were very clear – if a funding application is intended to help older adults alone or in concert with helping other age groups – the foundations’ decision to fund would be based on the quality of the proposal and the ability of the applicant to make a compelling case for funding. Some family foundations indicated that they depend on their selected nonprofit partners to define what needs must be met, so if the nonprofit came forward with a plan to include older adults in their plans, either as recipients of the services or as volunteers in the programs, they would seriously consider the application because they trust the organizations in which they regularly invest.

- This group made it clear that those grantees and new applicants must take the lead in creating the new models while making a strong case for building aging-friendly components or programs into their funding models.
4. Our priorities do-not-include-older-adults funders were definitive – they do not plan to fund, nor have they ever funded, programs that are designed to help or include older adults. In fact, one funder said, “If an [applicant] wants funding to do something for the elderly, it has almost always gets turned down despite the fact that the board exists of people in their 70s, 80s and 90s.” There were two caveats to this position. Those that fund medical programs or solutions to social problems said their funded programs might coincidentally help older adults if they have the medical disorder or a need for services funded. “To the extent that [older adults] are part of the homeless community or to the extent they are recipients of all the social services I have been talking out ... then they are impacted directly. Otherwise, not.” Their investments, however, were made to rectify problems that afflict children, youth and younger adults, not those typically found in the elderly. Some indicated that they would not object to seeing older adults volunteers be used to help their nonprofit’s constituencies, but would not specify this as an obligation for funding.

✓ A possible chink in this type of funders’ armor may be if trusted partners made a strong case for using older adults as productive volunteers in their current programs. The nonprofits must, however, place the emphasis on the value to their target audiences not to the older adult volunteers.

B. Funders’ Priorities that Drive Funding Decisions
As seen in the funders’ profiles, funding philosophies fell along a continuum and varied considerably. Many of those interviewed indicated that their decision making processes for funding adhere rigorously to their founders’ original vision and mandates, leaving little room for making different choices. Some, however, indicated that they and their boards were in a position to explore more global interpretations of those mandates, to include more collaboration with other funders, community organizations, and government agencies and residents. The concept of community building was intriguing to these funders, and they asked to be kept apprised of future developments.

1. Clear funding priorities were the norm for most funders.
Most funders described three to five broad funding categories that covered their areas of concentration. Some were target-audience related, such as helping at-risk-youth, women and girls, or the mentally ill. Others took on social problems such homelessness, hunger, or immigration. Some focused on global issues such as the environment, social justice, health, or education. Still others described institutions as their focus, such as Mayo Clinic, universities, zoos, hospitals, food banks, or hospice. Many funders’ descriptions intersected across multiple interest areas. For instance, homelessness and hunger go hand-in-hand, so food banks would be a logical investment. In most of the foundations, the stated funding priorities clearly drove decision making.

2. Some funders are expanding strategic goals to more explicitly address community needs.
For a few funders, however, there was a lot of room for interpretation of their priority areas. They expressed a willingness to consider new programs or initiatives if the proposed plans were particularly compelling and struck a resonant chord with the family or the foundation staff. A few are in a strategic planning phase and/or are funding a community planning grant to help expand their impact by engaging the community’s organizational partners and residents in the planning process. One funder looks at the implementation of a community building initiative as an economically smart move.

“We have provided a planning grant to help move to the next level. Primary part of the intervention is around schools, naturally, but we know that to fully build out what this reimagined system will look like, other players will have to come to the table. We will bring employers to the table to ask what they are looking for in terms of a workforce, military, and agribusiness. We are bringing business to the table because it is a business economic development approach.”
3. The decision-making tactics of the funders varied greatly.
Some do not accept unsolicited applications but only fund nonprofit organizations that have proven track records and which the funder, the board members or family members have identified as their chosen investment partners. Responses ranged from “We fund causes that our board members, my friends or I like,” (from a small family foundation) to a “We invest in well thought through, broad-based initiatives involving months of planning and collaboration with other funders,” (from a community foundation). Those that aim to implement broad-community, big-impact initiatives understood that collaborative community building takes a much longer, more concerted effort but that the payoff could be much more significant for residents of all ages.

“We are moving away from strictly programmatic investments to that of a community as a whole. We have been engaged in a large-scale project is Yuma Union High School District in Yuma, Arizona around changing the culture of the high school completely to develop higher expectations, rigorous college preparatory course work for all students (not select students) but the entire district. ... It is a complete change in sense of expectations for students and expectations from teachers. For it to be successful we know that it needs the entire community to buy in to it. We are moving away from “we will fund a program here” to this is a change in the way they are doing things at that district level but it has an impact across the whole community. That is where we are heading...”

Nonprofits that carefully research their target funders’ philosophies and understand the mandates they live by will be inherently more successful in securing funding for their programs and initiatives.

C. Funders’ Vision of their Communities
During the interviews, funders were asked to describe their vision of the communities that they serve.

1. Funders’ visions of “community” varied widely.
Some described the groups served in their funding priorities – foster care kids, families in crisis, homeless, etc. – as their communities. Others referred to the defined geographic areas they served as their communities, while others struggled with talking about their work in the context of “community.” Some make their investments in discrete programs focused on individual outcomes while hoping to make a larger impact by working to improve the life of one person at a time.

“When you give a grant to an organization you’re hoping it will have a larger ripple effect in the community, not just one program at a time, but sometimes you have to start with, for instance, “helping hands for single moms.” Helping one student at a time get a degree will affect her family and her community when she gets into the workforce.”

“You may have a lofty idea about saving the world, but it has to start someplace small with an outcome that is very specific to a program for that population. The effect on a young adult [that we have helped] may be really small but it can have a great impact on the community.”

2. Some funders’ projects achieved unintended communitywide benefits.
Some of the family foundations did not necessarily see their work as intending to serve a larger community, but had examples of projects that have, in hindsight, achieved a communitywide benefit. One made a bricks-and-mortar investment in a neighborhood YMCA where community programming has far exceeded their conception of its value when they funded the building. The YMCA is now serving a wide variety of ages and needs, including on-site dental clinics for at-risk populations.

3. Some funders focus on high-risk geographic communities but fund discrete programs.
Some funders define their communities as geographic areas or neighborhoods where social and economic challenges put residents at risk and offer minimal opportunities to achieve a reasonable quality of life. While these funders’ communities are geographically defined, their programmatic investments are still...
aimed at achieving individual or organizational outcomes. These discrete programs make valuable contributions in their own ways but the broader community benefits that could be achieved by joining forces with other such programs are not implemented. Moreover, the broader community impact of the discrete programs are not typically tracked or documented.

4. “Enriching community” is a nebulous concept so is much less likely to be funded.
At least three of the respondent organizations described one of their strategic organizational goals as enhancing or enriching community but had little evidence that they were investing much in this priority. One funder explained, “...Enriching community is always the hardest one to define. So, we fund very little in that specific area.”

D. Place of Older Adults in Funders’ Worldview
With a few exceptions, most participants did not understand the social and economic significance of the burgeoning aging demographic. As a result, older adults did not factor into their funding plans or investments. However, during the interviews, the idea of using older adults as skilled volunteers caught the interest of participants from all four funder profiles. They offered many suggestions for capitalizing on volunteer resources but also discussed the challenges that nonprofits would have to address if they seriously incorporate a volunteer labor force into their organizations.

1. Level of knowledge among funders varied widely about issues impacting older adults.
As a part of the research dialogue, funders were given a packet of exhibits that highlighted the dramatic trends associated with the changing aging demographic as well as some characteristics and conditions that are arising due to the growing needs, expanding assets, and escalating impact of the 65+ population on American society. After reviewing the exhibits, the respondents were asked to comment on the data. The responses ranged from, “This information opened my eyes -- we must put more effort in to learning more about older adults” to “While we would never say, ‘You can’t fund things for old people,’ it will never happen.”

The demographic information in the exhibits was intended to determine how informed the funders were about aging in America. The respondents’ reactions to the data and the subsequent dialogue indicated that funders had very little factual information about the demographic shifts. Moreover, the social and economic implications of this shift have not been of concern to funders that focus on other age groups. The knowledge gap points to a tangible need for continued education on the topic.

“I knew this information, but I did not know it! We didn’t even consider [aging] issues when we started to focus on immigration. It is a matter of being aware of these facts and educating ourselves on all these issues because older adults’ needs are often invisible but the needs are great. It takes time, energy and effort to learn about them.”

“It is a matter of social justice. I leave here today a lot more aware of the issues.”

“I am irritated that I hadn’t thought about this situation with [older adults] prior to noon today. More than anything else this has given me food for thought to consider some other options.”

“When I walked in the door today, if you had asked me if my funding is diversified, I would have said, ‘Yes, it really is because we address a wide range of areas.’ But if you ask about diversity from the standpoint of age, it’s not! There was not the intention to preclude someone older than you or me, but as soon as you bring up education, it is primarily focused on the first third of life. Not to say that someone in their second or third part of their lives doesn’t need education, but we don’t think that way.”

“Admittedly I have to say no, our foundation has not focused on the older generation, just ages 0-5 and the middle aged mother. Awareness is good. Maybe after this session, we will have a little more intention on how older adults can have an effect.”
2. Engaging older adults as volunteers captured funders’ attention.
Capitalizing on older adults’ assets as volunteers was an intriguing idea for many of the funders. The exhibits used during the interview helped make the connection between the burgeoning group of skilled, educated 65+ population and communities that need help mobilizing neighborhoods to improve life for people of all ages.

“We have a huge population of highly educated, highly motivated retired people. Why are we not engaging them more?”

“I am a great supporter of volunteer programs..... Like mentoring programs, not only has the child benefitted but the older person benefits. ... It is a reason for kids to come to school and a reason for seniors to get up in the morning. It helps everyone.”

“I don’t think that we have invested where there has been a clear participation by the elder or retired community. There certainly are opportunities... knowing that the baby boomers in on the verge of retirement there is tremendous expertise and knowledge and experience in that generation/age group. They offer so much, and as they retire it would be a terrible shame to lose that knowledge and experience and what they can provide.”

3. Benefits seen in engaging older adults as volunteers.
Most of the funders do not support programs designed to explicitly engage older adults as capacity-building volunteer corps in the nonprofits they fund. If their nonprofit partners were currently using older adults as volunteers, the reason was to achieve their core goals and better serve their target audiences not because of a commitment to meaningfully engage older adults or to increase organizational capacity through volunteerism.

a. Volunteers providing operational support provide economic value to nonprofits. One funder, while not committed to funding older adults programs specifically, saw the mutual benefits of volunteering for a nonprofit museum they support.

“One area is where we are using older people as volunteers is the museum.... Seniors are looking for engagement, looking for a reason to do something. We have a very active volunteer group of people who help with the different functions of operating the museum. If we had to pay for that kind of labor, we wouldn’t be able to operate it as we do today. Where we see the value is that these are people who want to contribute time, they have the confidence in what they do, it gives them meaning, and they provide their time at no cost to us. It is a win-win situation for both them and for us.”

b. Increasingly high educational levels of older adults caught the attention of many of the participants. According to participants, the most remarkable fact in the exhibits was that older adults are better educated and have higher skill levels than any group that came before them – by 2025 almost one third of those 65 and older will be college graduates. One funder immediately made the connection between older adults’ high educational attainment, their willingness to help others, and how these attributes could positively serve the needs of foster children in the state.

“The Arizona Community Foundation and Helios have partnered on the Accio grant to provide funding for a statewide education reform initiative focused on the children in foster care. Recent statistics show that over 12,000 children are in foster care in Arizona and the educational outcomes for them are dismal. Child protective services [are] completely overwhelmed. [The project] will make the connections between the Department of Education, the Department of Economic Security, and Department of Children and Family Services. Their goal is to find an educational champion for every student in foster care. Ideally this would be someone in their family, but this would be a great opportunity for people in retirement. They don’t need to be foster parents, but to be that educational champion for these students. I am sure that there will be a lot of folks with the education and the passion to help.”
c. Re-training older adults with industry experience to become teachers. With the growing needs in education for skilled science, technology, engineering and math teachers, one funder suggested that re-trained career scientists could offer a tremendous teaching resource to educational systems.

“In the education world … we hear the conversations about alternative certifications for people who have tremendous industry experience as teachers. They may have retired from a high tech job or where math was a key piece of their expertise… where retraining those folks would get them on the path to teach. … I know that our funding dollars have not done this yet but there certainly are opportunities to build this into the mosaic of what we do and make sure that we recognize the value of [older adults] to the community.”

4. Challenges in engaging older adults as volunteers.
Some funders felt that the implementation of volunteer programs posed some challenges that need to be addressed as nonprofits seek to increase the use of older adults as volunteers.

a. Formally identifying older adults’ assets. The first challenge identified was the need to carefully identify and document the talents, skills and interests of older adults. With this information in hand, the volunteers’ needs could be matched to nonprofits that need the volunteer’s particular skills. More precise matches could increase volunteer satisfaction with their work and enhance nonprofits’ value gleaned from an unpaid but skilled labor force.

“[There is high need] for volunteers and a highly educated [older adult] population – how do you look at both at the same time? We need that population that is well educated, have these assets and are thinking about what they have to leave behind … You may be 85 and have some needs but you also have the ability to be part of something that is more legacy building. How do we learn what they have to contribute?”

b. Connecting volunteers to community needs. The second challenge identified was the need to make nonprofits aware of the huge resource pool offered by older adult volunteers. Conversely, if older adult volunteers knew of tangible opportunities to fulfill community needs were well matched with their particular talents, they may be more likely to become volunteers.

“[Although] we generally work with the recipient agency that is actually doing work on the ground, we would look to them to ask, ‘Who would be appropriate partners?’ Who do you bring into this? We would be very open to [engaging] this population – they would be a great asset. … They are a huge part of that larger community with a lot to bring to the table. They help make change; they improve community, and are also a part of the community that is impacted by the education system so there is a natural connection.”

c. Addressing the legal and safety aspects of using volunteers. Another pointed out that there are many administrative hurdles inherent in using volunteers that must be identified and handled. While one funder noted that this could deter nonprofits’ efforts to use volunteers, some nonprofits have successfully surmounted this challenge with innovative tactics and solutions.

“With the schools there is a lot of red tape for getting finger printing for those that serve there – there are many barriers like these we need to get around but it is doable.”

d. Improving the image of volunteerism to attract more volunteers. One funder suggested that putting a more positive spin on being a volunteer would help older adults view volunteering as an unpaid, but valuable second or third career. The funder suggested that this might inspire older adults to become more engaged.

“[Volunteering] … is not something you aspire to do and it is not something that means anything significant. We don’t market it. We don’t sell it either from a not-for-profit or a for-profit perspective. It’s an area where there are a lot of people out there that want to make contributions but how do we do we market it in a way to provide ego gratification and a sense of
self-esteem? ... How do we get information out to retirees so it is internalized and utilized so people [will help meet the] needs.”

e. Influencing social media outlets to be more aware of aging issues. More than one funder called attention to the fact that our attitudes about older adults are strongly influenced by the media and marketing messages we see and hear every day. While no one had a suggestion regarding how to address this issue, it was clear that public opinions – including negative attitudes – about aging come from many powerful fronts.

“Around the holidays, when the Arizona Republic runs an article, like the Season for Sharing -- who do they highlight? Do they highlight old people? No, they highlight families. We are a product of our environment. One of those things that influence our environment is the informational screen that we see through [social] marketing.”

E. Funders’ Perspective on Intergenerational Community Building

Funders were asked to consider a collaborative, intergenerational approach to funding and to answer the question: “While each funder, nonprofit organization and government agency makes contributions to the well-being of their target audiences working alone – would working together to create a collaborative initiative produce greater outcomes and achieve larger impacts across the state?” Their answers offered valuable insights into what might be possible and how it can be accomplished.

1. Intergenerational program building would have more appeal than an aging perspective. Overall responses across funder segments indicated that community initiatives would appeal to more funders if the collaborative models focused on intergenerational programs (rather than aging initiatives), especially for funders that do not traditionally include older adults in their funding priorities. These models would allow funders with targeted programmatic priorities, such as children and youth, find a way to continue to address their funding priorities within the context of the larger community initiative.

“That model is where it could touch us but our funding would have to be primarily focused on the youth.”

When asked if they would consider funding intergenerational programs and participating in a community-building initiative, some funders immediately indicated that they were very intrigued by the idea.

“Absolutely, as long as it fits the needs of the community [and our] emphasis on primary care series for people at risk in Flagstaff ... absolutely.”

“I would like to explore more about model programs and like the idea of integrating all age groups, rather than medical research for the aged. I think the idea of integrating all age groups is really exciting.”

“This example shows how to help parishes figure out how they can involve some [older adults]. Sounds like an excellent idea. We deal with a lot of parishes who deal with a lot of older adults but it has not been a focus. I think it is a huge opportunity.”

2. Grantees may need to broaden their thinking to incorporate intergenerational concepts into program design and planning. For some funders and nonprofits, thinking in terms of intergenerational community building would involve considerable changes in attitudes, values and approaches to their work. In philanthropic-nonprofit partnerships, either party can broach the subject of building broader community initiatives. Many foundations depend on their nonprofit partners to bring innovative ideas to the table and make a case for a shift in their work. After seeing a community-building, intergenerational program example in the exhibits, however, some funders indicated that they would introduce the idea to their grantees as a possible new approach to their work.
“It will be part of our conversations [with our nonprofits] during our on-site visits. We continue to have conversations and we need to say: ‘This is an interest of ours, so do you see any opportunities in your work to incorporate generations working together?’”

3. A systems change model that goes beyond isolated programmatic funding is needed.
One funder pointed out that a philosophical shift needs to occur in Arizona to move from the propensity to fund individual programs to joining other funders in envisioning and implementing a broader, collaborative systems change model.

We have been around for six years, learned a lot, doing a lot of programmatic funding, but now it is getting focused more systemically. Where our dollars may still go for some components of programs but it would have to connect to the larger system change around early childhood education so we would not be the only funder at the table. Want to make sure people are looking at it from a variety of perspectives, not only in the classroom but where other pieces fit in. We have learned that some isolated interventions won’t create the changes we would like to see.”

4. Collaborative partnerships are essential when funding community-building initiatives.
Some funders began speculating about how more collaboration across sectors could strengthen a community initiative.

“Think there is a possibly the government can collaborate with the private sector and we can fund some things together that we have not even thought about.”

“... to truly make a change at the level we are hoping to see, it is not just about teacher and students in the classroom ... the connections to all the other pieces of the community are so important. You can’t do it in isolation. It is a community endeavor. To create a community that is welcoming and engaging for everybody, takes a lot of different partners.”

One funder thought that reactivating community initiatives they had funded in the past would be a cost-effective way to integrate older adults into existing efforts.

“Using models that have worked for them in the past... we could help existing collaborative efforts to see if we could intensify or expand what they are doing. I don’t know if Sunnyside has much going on in reaching or using seniors. ... We don’t have huge capacity or funds to do a lot of new efforts, but if there are ways of taking existing efforts and helping them become more adept in addressing this issue, this is a more likely way [for us] to do it.”

5. Unanswered questions remain on how to achieve the ideal intergenerational model.
Several funders suggested that there were many unanswered questions related to community building initiatives and/or their participation in such endeavors. The questions suggested a need for building a strong model for community development that includes fully engaging community members. If the model design offers funders the chance to support discrete components aligned with their priorities, yet built to create a larger community impact around shared, global goals more funders might sign on. If the community-oriented, big-picture-thinker funders take the time to bring new funders on board, to seek their input to build model ownership, and ensure that their funding priorities continue to be met in the process of the broader movement, the initiatives will likely lead to positive outcomes for Arizona.

“We are thinking about workforce development so this will include a larger pool of people. We are re-looking at our post-secondary area to see how we can be more impactful. Internally looking at this and will bring to the board later this year... probably ask for some strategy investments.... How can we have the most impact with the limited dollars? Where can we go a little bit deeper?”
“Our current annual competitive grants program is quite broken ... should we be doing impact grants, like four grant of $100,000? Should we be doing initiatives? Funding a start-up? What partnerships? That is probably where we want to go with that bucket.

“I would like an understanding what the need is. What is our role to meet the need? How can we make a better, healthier, safer community? It sounds easy but the implementation might be difficult and painful.”

“I feel it is something I have to educate myself about. Just like I have to educate myself about other issues we are supporting. This is a new area for us. Being aware of it and thinking of possibilities... when something comes up look into it and it is a need.”

6. Funding for intergenerational programs must be done in concert with the community.
Some key issues arose in discussing the possibility of funders broadening their scope to include older adults or becoming a collaborative funder within a larger community-building initiative.

a. Community “will” and resident engagement must be secured and nurtured. One funder pointed out that designing and implementing a large community initiative takes more than funding. It takes the desire and engagement of the residents, the businesses, the service organizations, and the government to make such an endeavor work.

“I suspect when we talk about age-friendly cities, particularly this program that was described, I don’t think I have heard that this is part of political will in this city and state. Maybe we can move beyond individually funding what we see as a particular need in this city, this community, or this state and meet on a global perspective on how to promote this whole process in the political process of creating an [aging supportive community].”

b. Nonprofits must take responsibility in setting the direction for change. For many funders, the impetus for the community building model design must come from trusted nonprofits that present a compelling and convincing case in their proposals. These funders depend on the nonprofit organizations’ ability to set innovative future directions and determine what programs would fulfill these goals.

“It must come from the organization. If a particular nonprofit supported a cross-generational program (or a cause like that) and they ask us to consider ... supporting something like that, I would say, it depends. If we support the organization and if the organization feels that strongly about a program like that we will take a look at it.”

c. High caliber proposals are essential in seeking funding for programs that include older adults. One funder indicated that the decision to fund programs to benefit aging adults is merely an issue of which program presents the better proposal.

“An increase [for aging programs] will depend on how people apply for funding. ... We are broad based in our funding, but we prioritize applicants that come in the door and fund until we spend all our money. It is based on competitive funding rounds and if six senior programs get funded in one round, it is because six good [senior] proposals came in the door.”

7. Supporting programs that benefit older adults do not fit some funders’ priorities.
The funders that fell into the segment that will not fund aging programs recognized the merits of the example model in the exhibits, even though they will probably never be part of the collaborative funding team. One feared that they may lose control over the selection of the recipient organizations (whom they vet very carefully) if they do collaborative funding. For others, fulfilling programmatic goals that include older adults simply do not fit into their “wheelhouse.”

“In my foundation, I don’t want to worry about this... every individual over 65 has their own individual needs and desires, things they want to do with their time, and that is their right to
decide what they want to do with this. [This] will be absorbed into our culture, in healthcare jobs, and in volunteer work.”

“This is an important conversation. It helps us become more aware of the issues out there. There is certainly is a place for funding older adults to help them in their older years. I don’t know if this should be private funding or government programs. It is important that we do have a lot of programs for people in need. It is not necessarily my foundation that will fund them but there will be those that will.”

“We have much bigger problems that are clear and present so I would rather focus on that. I don’t want to sugar coat my perception... These are good ideas, but I would personally rather focus my foundation and my own energy on some of the bigger, more urgent things.”

“Theoretically this is a nice concept, if you can get some synergy going and serve two markets at the same time...great, but if you try to please too many you may not succeed.”

a. Seeing volunteers effectively serve other target audiences could open the door to more intergenerational programming. While some funders did not fund programs for older adults, they could see a definite advantage in bringing in older adult volunteers into nonprofits to increase their capacity to serve their target audiences. One suggested recruiting senior mentors to help the college scholarship recipients succeed in school. Another suggested that older adult volunteers could increase the capacity of one of their grantees to serve more disadvantaged children.

“[Our grantee] is turning children away. They have a staff turnover and management problem. If someone came to me and said, ‘I have idea. I want to hire a recruiter and trainer to get 50 volunteers who would work 20 hours a week. We would need someone to manage this (because most nonprofits do not want to mess with this). So please fund a position of recruiter/trainer to recruit a group of volunteer and train them to help....’ I might consider it.”

b. Free enterprise will serve older adults’ needs. One funder suggested that there will be growing entrepreneurial opportunities for young people to fulfill the needs of older adults as they age. While they will not be interested in addressing the growing needs of older adults, perhaps others could nurture small businesses that seek to fill the service and product needs of the growing ranks of chronically ill adults.

“[Older people are an] up and coming industry opportunity—young people are coming out of college with big hearts and lots of passions and are positive about community... In America we tend not to deal with something until it is right upon us. In 18 years 20% of older Americans will be over 65. Some community will respond to that. If...you take 100 75-year olds, there will be 100 different support groups or businesses that might be started... I would start a business to recruit volunteers and nonprofits would pay me for this. This is a business opportunity... Older people won’t be lacking attention.”

# Attitudes about older adults that militate against intergenerational community building.

While no two funders interviewed were alike, some common attitudinal themes and concerns about support for older adults emerged from the discussions.

a. Artifacts of the Arizona lifestyle do not foster community interactions. First, the lifestyle in Arizona was mentioned several times when the status of older adults and community was discussed. The funders described several characteristics that diminish the likelihood that community programs will engage older adults in meaningful ways.

- Senior retirement communities isolate older adults from the hubbub of life, from children and families: “We create these beautiful little Shangri-Las where seniors can go and have their activities, recreation centers, and golf courses...”
The built environment also precludes social interaction: “They pull into their garage, shut the door, and sit in their backyard. They don’t sit in their rocker on their front porch. ... How do we help each other and what roles can our [grantees] play in this? Grantees are our link.”

Lack of adequate transportation was also mentioned as a barrier to social interaction among generations, where older adults cannot easily leave their neighborhoods to interact with people of other ages. “We tend to isolate older folks in Sun Cities or in senior citizen housing areas. We need a more integrated approach to development of community and a broad range of ages represented in our communities.”

b. Seniors do not support educational referendums so they are not considered good bets in some funders’ worlds. The funders that focus on education as a priority mentioned the lack of support from retirees for tax initiatives intended to improve education in their communities. Those that brought the issue up saw the benefit of getting older adults involved in community initiatives that would engage them in creating healthier communities. If older adults were fully engaged in intergenerational activities, they might understand more about the importance of support for education to their own lives as they age.

“I would be interested in becoming an advocate for who needs what and when they need it (over the life span)... When senior citizens say, ‘I don’t care about schools so why should I pay so much property tax?’ and younger people say, ‘I am healthy so why do I need health insurance?’ I am more inclined to support some sort of an advocacy movement (addressing issues over the life span) than focus on any particular age group.”

“One of the arguments that people make for the retired community to take a greater interest in education is that the people [being educated] will be taking care of you as you get older. ... Everybody should have an interest in the quality of education that students are receiving today because they are the future caregivers.”

“It takes the will to make change [to ask seniors to support education]. There are a couple of ways we are building community will... it is information sharing and public awareness building around the importance of education, and why education is so important to every aspect of community – like economic development, and jobs, even for the retired population. This message is hard to craft... you do get the people that say ‘My kids are done with school so I don’t want to pay property tax for schools,’ but it is really a common good that people are educated. From a statewide, nationwide perspective, our economic vitality is dependent on the education system being the best it can be and preparing student for the jobs that are out there. ... Making sure the companies that are there have the educated workforce that they need. There is the economic argument but also there it is the right thing to do to ensure that all students have access to quality education and fully achieve their potential.”

c. The government takes care of those over 65 in America. Some funders felt that older adults are cared for adequately by government programs and services. Based on this belief, several of those interviewed felt that using philanthropic assets to help older people was definitely not of interest.

“I have a sense that the government takes care of old people. We are already spending a fortune on health care in the last year of life. ... We are spending a lot of money very inefficiently on old people.”

d. Older adults are mainly frail and investing in older adults is like putting money into a black hole. One funder felt that their commitment to making lasting social change does not include investing in older adults and another said that, “Prolonging life from age 80 to 100 is not a priority for us.” As the discussions evolved, it became clear that some believed that older adults are frail elderly citizens who do not contribute to society. A funder focused on using their funding to effect lasting change made it clear that this did not include helping older adults. The funder said, “It is hard to see how taking care of those that is exceptionally frail and not contributing [to society] is going to make any [lasting] change.”
Some funders were downright frank about the fact that they did not see the value of investing in older adults and if older adults benefitted from their funding, it was merely by “default.”

“Exposure to more information may not be convincing me because of the way we have focused our foundation for some many years. You can provide me with more information but I don’t know if it necessarily engages my interest, even though I am getting old.”

“If you had no more children sleeping in the streets, no more wives being battered, no more teenagers dropping out of high schools, schools are functioning, and we are at 95% employment — then we could focus on seniors.”

e. Older adults must take responsibility to solve their own problems. A subset of funders believe that older adults need to take responsibility for themselves and their lives by getting jobs or staying employed longer, which included getting retrained if necessary.

“We need more economic development for older people. This is where I come from. Older people need to work longer and find ways they could make more money. Particularly the older grandparents raising children—if they could get some job retraining like at Maricopa Skills Center where they had a program for grandparents raising grandchildren so they could increase their income they could solve their problems themselves.”

F. Funders’ Perceptions of AGF’s Role in Intergenerational Community Building

Ultimately, AGF seeks to support an ongoing learning community of funders, nonprofits and government agencies that operates with a shared understanding of what’s needed, what works and what’s possible to enhance the quality of life for Arizona’s older adults. Several suggestions emerged from the research that point to a critical role that AGF might play in the upcoming years relative to intergenerational community building in Arizona.

1. Education: Continue to prepare and disseminate materials to AGF’s constituencies.

a. Inform strategic planning and funding decisions with targeted grantmaker education. A segment of the funders that were revising their strategic priority setting were particularly interested in AGF helping them to understand what is happening in the philanthropic arena around intergenerational programming. They want answers to questions such as:

- What is going on in the field related to older adults, their needs and their assets?
- Where are the programmatic, service and funding gaps?
- What organizations are successfully serving seniors?
- Do seniors know where to get the help with basic services they need?
- Do seniors know where to offer to help?
- Who is currently funding community-building initiatives?
- What roles can small funders and large funders play simultaneously in community initiatives?
- How will funder collaboration make a bigger difference in Arizona communities?

One funder noted the need for more information to inform the foundations’ strategic planning decisions as well as to help educate their donors on how to make better investment decisions who want to help older people in Arizona.

“So we will take the big step this year to understand what is our role as grantmaker initially in the Valley, the State – maybe beyond. How do we partner with ACF, Jewish Community Foundation, through the Grantmakers Forum to understand the needs and bring opportunities to our donor-advised funds – to the donors who say who is really helping old people? Who is really helping? Not just the flavor of the month or who Channel 12 features... our impression is that there is a lot of stuff going on that nobody knows – and critical work that is underfunded. [We
must decide] what do we want our grants program to look like? What is the model and how do we get there? Instead of $2 million, should we give $4 million so we can move from a passive grantmaker to an active grantmaker?”

b. Produce more educational materials for AGF members to use in educating their stakeholders and nonprofit partners. The exhibits AGF produced to use in the dialogue with funders were designed to raise awareness among funders by highlighting some of the issues that are emerging as the aging tsunami approaches. The funders’ reaction showed how important it is to bring this information to light.

“We have a huge territory but are a very small organization. It is helpful when we can build off the energy of [other funders’] collaborative efforts. For example, the AGF research [in the exhibits] could be used with our board. I could not send someone off to do the leg work and put this type of research together. I think there is absolutely a benefit for us if there is a nucleus of work on the leadership model development that can help us implement what is appropriate for our community. ... And if there is a way we can tap into and be part of attracting resources, this could give leverage against our own [investments]. That is how we built so much of our early childhood work. We have not had these discussions about older adults or intergenerational work, however.”

“This sort of overview should be provided to our board, to take it to next step...we need to know what the “it” is and to bring together current [funded] partners and explore with them how we can help cultivate their ability to move these efforts forward.”

2. Facilitation: Continue to sponsor networking opportunities, foster collaboration and encourage leadership among AGF members and non-members.

a. Continue the EngAGEment affinity group but lose the “aging” label. AGF has created multiple affinity groups to help members convene with others sharing the same concerns, needs and desire for more information. Many of the funders suggested that AGF continue to beat the drum for intergenerational community building initiatives. AGF support of an affinity group that focuses on this topic is essential. The caution several funders voiced was to find a way to communicate so the non-aging funders see that the process is relevant to their interests. One said, “If AGF sends out an email with ‘aging’ in the title, I automatically delete it, thinking it is no intended for me.”

b. Encourage aging-savvy funding leaders to invite new funders to the table. Others indicated that they want to be invited to participate when more solid plans are in place, a model is selected and/or their peer funders are ready to proceed because a solid planning process was used to create a functional model for change. They also indicated that a personal call from their peers with tangible suggestions for their involvement would make them much more likely to consider participation in a collaborative community initiative.

3. Communication: Keep AGF members apprised of developments in intergenerational community work.

Most of the respondents indicated an interest in being informed of intergenerational community building news as the work develops. The challenge is how to make it relevant to these very busy professionals who have widely varying interests. One funder offered some insight to what would be of interest to those that are seeking to expand their strategic funding initiatives.

“We are grantmakers. Should we have a bucket of money? Should we do set-asides? Should we do initiatives? ... Who should we help? Who should we partner with? If grantmakers are going to fund [intergenerational programs], we don’t really want to be in the caboose and say “Oh, stop the train and wait for us.”... We want to understand what the potential programs would like and where do we fit.”
“We are not a private foundation so we have to focus purely on educational institutions and education initiatives. But, keep us informed as this develops...you never know what opportunity could arise.”

VI. Conclusions and Recommendations

The dialogues with funders included initial exploratory questions, a presentation of educational exhibits to build awareness of aging issues, followed by more questions to understand the funders’ points of view once they viewed the data on the status of older adults in Arizona. The following conclusions emerged from the conversations:

A. Capitalize on Assets of Aging to Build Community Capacity

1. Focus on assets, skills and talents of older adults, not only on the deficits and dependencies.

Nonprofits and funders alike would benefit from shifting the focus to the contributions older adults could make rather than framing their perspective on aging around the frail, chronically ill, isolated elderly. Frail elderly are a small proportion of the older adult population, albeit the group is growing in size due to demographic shifts. Likewise, the numbers of older adults that are able to contribute are also growing in size, offering communities a substantial volunteer labor force – if the potential volunteers’ skills and interests are matched with appealing opportunities in nonprofits that can appreciate and nurture people in a volunteer role.

2. Establish ways to connect skilled, motivated older adults with community needs.

Put process solutions in place that will help identify and connect the assets of older adults with the programs and organizations that need these assets. One paid volunteer coordinator can marshal the skills of numerous skilled volunteers and show a solid return on investment. Invest in understanding older adults’ needs as volunteers and the nonprofits’ needs in capitalizing on volunteers so the volunteer program is managed as well as any paid department in the nonprofit.

3. Educate grantmakers and nonprofits alike to understand and capitalize on assets of aging.

Educate grantmakers across the state to help shift attitudes toward grantmaking that encompasses – not isolates – the aging populations in their funding decisions as valuable assets in their communities and their funding portfolios. The 65+ population is the second wealthiest age group in America. Aging populations, including those with social security as their only income, are economic engines that help drive the quality of life and the economic prosperity in our communities and our state. This fact, along with the skills volunteer bring, can become an economic boon to communities across the state.

B. Incorporate an Aging Lens in all Philanthropic Work

1. Every funder will inevitably face the social and economic ramifications of the changing aging demographic.

A portion of funders have clearly stated they have no interest in programs that benefit aging persons, but the aging population bulge that is overtaking communities could be turned to their advantage. If funders and nonprofits alike could re-frame their attitudes about older adults as an important part of their communities’ solutions, not as part of the problem, doors would open for opportunities to maximize the resources older adults bring to the table. Fostering more dialogue among funders on successful collaborative models to meet the needs of people of all ages in Arizona’s communities would ultimately serve all funders’ constituencies and still allow them to continue to address their core funding priorities.

2. All funders ultimately touch the lives of older adults, whether they fund aging or not.

Funders with widely varying interests willing to broaden their worldview by adding an aging lens could enrich their own and their organizational partners’ capacity to deliver on their shared goals. When
grantmakers begin to make the connection between a highly educated, aging boomer population and programs that need talented, willing help, the lives of people of all ages may improve in Arizona. Nonprofits and funders alike could benefit from the capacity-building talents of aging boomers.

3. Older adults are commandeering a major share of the countries’ economic resources on both ends of the wealth spectrum.
The swelling ranks of older adults are living longer, bearing more family responsibilities, and working and/or volunteering later into life – thus wielding more power in all aspects of community decision making. Funders investing in health care programs, safety net programming, economic development initiatives, and education and housing programs will run into grandparents raising grandchildren, households with extended families, and older adults who want to step up and give back to their communities. Funders could encourage their nonprofit partners to find ways to use this talent to help kids, the homeless, and others in Arizona communities.

4. Support social enterprise and entrepreneurial efforts to meet the needs of older adults.
Encourage social enterprise and entrepreneurial endeavors for policy, product and service innovations that will improve the lives of people as they age. To remain healthy and active, many aging boomers are willing to pay for what they want when they want it – and their needs are increasing as they age. Among the chronically ill older adults, there is a growing need for assistive medical devices, quality home care, effective case management, accessible adult day care and other supportive products and services, many of which are paid for by Medicare and Medicaid. Social enterprise endeavors to better serve older adults could be another way to support aging in America, while encouraging economic initiatives.

C. Encourage Nonprofits to take the Lead in Proposing Intergenerational Community Solutions.

1. Nonprofit organizations are in a pivotal position to move the needle on aging awareness among their funding partners.
Trusted grantees that can explain the benefits of older adult volunteers and design credible implementation models will provide funders with documentation to support a return on their investment in engaging older volunteers. When program outcomes are improved for the selected target audiences because of older adults’ contributions, people of all ages win!

2. Strengthen nonprofits’ ability to successfully propose intergenerational solutions.
A substantial portion of funders rely on their grantees to take the lead in identifying critical issues and proposing innovative, fundable solutions. If nonprofits could take a stronger lead in proposing intergenerational solutions to the problems their organizations are addressing in Arizona’s communities, significant inroads to making broad community change might occur. One suggestion from funders was that there are successful evidence-based program models from other communities that could be skillfully adapted to Arizona. No need to reinvent the wheel when others have blazed the trail and created successful models with proven results. Nonprofits could customize the models to the characteristics of their local communities and save time and money in achieving success. This appeals to funders and increases the chances of garnering funding.

3. Educate nonprofits on the characteristics funders are seeking in grantees.
As funders’ described the role they want nonprofits to play in proposing intergenerational community-based programs, they noted that when they select organizations to fund, they carefully look at certain characteristics the potential grantee to determine if their investment in the organization will be merited. Examples of the some of the characteristics funders look for include stable organizations with proven track records; a prior successful project with the funder; projects that promise to demonstrate tangible outcomes; good fiscal management in the organization; solid, productive relationships with other
organizations in the community; and proposed plans and programs that clearly match the funders’ priorities.

D.  **Collaboration is Key for Productive Community Building**

1. **When people build community together, they build intergenerational understanding.** Engage older adults in solving community issues that include improving education communitywide. This will generate better understanding of the need for an educated workforce (e.g., healthcare workers). Seeing the personal value of education to their quality of life could generate goodwill that may translate to older adults voting for school initiatives.

2. **Frame community building as a collaborative process to help people of all ages, not as isolated programs that benefit different age groups.** Funders focused on improving the lot of many different types of populations (e.g., homeless, foster children, single mothers, etc.) could frame the conversation around creating community change that works for people of all ages. Some funders are learning that what is beneficial for children, young people and families is also good for older adults and the community as a whole. They are making a connection between the communities’ problems and the community resources available to create homegrown solutions the community members can own.

3. **Generate a collaborative model for healthy communities that engage all.** For a large-scale initiative to succeed in building communities that work for people of all ages, a small group of funders, nonprofits, government agencies, businesses and citizens must work together to design and build a model that encourages communities to meet their own needs. As the model is built, helping other funders find a place in the effort that works well for them – that matches their funding priorities and compliments their existing programs – will build momentum among all partners.

Becoming involved with existing efforts in Arizona could be another avenue to build funders’ capacity to support community building efforts. Some examples of successful efforts include the Arizona Community Foundations’ “Communities for All Ages”; the Arizona Elder Economic Security Initiative Coalition (AZESSI) that is emerging with leadership from the Northern Arizona Seniors in Action Coalition in collaboration with the Office on Aging, Arizona Department of Economic Security; and Maricopa Association of Governments’ participation in the national “City Leaders Institute on Aging in Place.” Asking new funders to participate in these endeavors could be attractive to those that need to see tangible evidence of progress and success.
VII. Appendices

Appendix A. EngAGEment Initiative Design Team Members

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## Appendix B. EngAGEment Initiative Research Participants

<table>
<thead>
<tr>
<th>Research Participants*</th>
<th>Organization</th>
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<tbody>
<tr>
<td>Laura Atwell</td>
<td>McMiles Foundation/Hickey Family Foundation</td>
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<tr>
<td>Regina Bidstrup</td>
<td>The Bidstrup Foundation</td>
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<tr>
<td>Nancy Baldwin</td>
<td>Hickey Family Foundation</td>
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<tr>
<td>Kerry Blume</td>
<td>United Way of Northern Arizona</td>
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<tr>
<td>Julie Coleman</td>
<td>APS Foundation, Inc.</td>
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<tr>
<td>George Getz</td>
<td>Globe Foundation</td>
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<tr>
<td>Denise Higgins</td>
<td>Ibis Foundation of Arizona</td>
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<tr>
<td>Lawrence A. Johnson</td>
<td>Del E. Webb Foundation</td>
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<tr>
<td>Thomas W. Lewis</td>
<td>T.W. Lewis Foundation</td>
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<tr>
<td>Linda Lohse</td>
<td>Tucson Foundations</td>
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<tr>
<td>Ann Lovell</td>
<td>The David and Lura Lovell Foundation</td>
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<tr>
<td>John Muessle</td>
<td>Arizona Foundation for Educational Advancement</td>
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<tr>
<td>Pat Miles</td>
<td>McMiles Foundation</td>
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<tr>
<td>Donna Marino</td>
<td>Catholic Community Foundation</td>
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<tr>
<td>Clint Mabie</td>
<td>Community Foundation for Southern Arizona</td>
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<tr>
<td>Stuart Mellan</td>
<td>Jewish Federation of Southern Arizona</td>
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<tr>
<td>Evan Mendelson</td>
<td>Community Foundation for Southern Arizona</td>
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<tr>
<td>Carrie Ostroski</td>
<td>Dorrance Family Foundation</td>
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<tr>
<td>Ed Portnoy</td>
<td>Nina Mason Pulliam Charitable Trust</td>
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<tr>
<td>Laura Penny</td>
<td>Women's Foundation of Southern Arizona</td>
</tr>
<tr>
<td>Barbara Ryan</td>
<td>Helios Education Foundation</td>
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<tr>
<td>John D. Richardson</td>
<td>John D. Richardson Foundation</td>
</tr>
<tr>
<td>Tracy Salkowitz</td>
<td>Jewish Community Foundation of Southern Arizona</td>
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<tr>
<td>Tim Thomas</td>
<td>Forest Highlands Foundation</td>
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<tr>
<td>Mollie Trivers</td>
<td>Whiteman Foundation</td>
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<tr>
<td>Anthony Vuturo</td>
<td>Canyon Ranch &amp; Vuturo Family Private Foundation</td>
</tr>
<tr>
<td>Kathy Wilson</td>
<td>United Way of Tucson and Southern Arizona</td>
</tr>
<tr>
<td>Stephen Wolslager</td>
<td>Wolslager Foundation</td>
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<tr>
<td>Cree Zischke</td>
<td>JP Morgan Chase</td>
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* One participant choose not to be identified in the report
Appendix C. EngAGEment Research Invitation Letter

Dear xxxx:

As an influential grantmaker in [Prescott/Tucson/Flagstaff/Phoenix/Maricopa County] who is committed to improving the quality of life for Arizona’s communities, I am writing to introduce you to an important research project that Arizona Grantmakers Forum (AGF) has recently launched.

AGF is engaged in a two-year project to conduct a formative assessment of Arizona-based funders regarding their perceptions about ways to improve our communities to better support people of all ages. Our goal this year is conduct focus groups with key funders in communities around Arizona to explore topics such as:

- How you go about your funding work and what communities do you primarily serve?
- Where does your organization fit into growing efforts to build vibrant communities that work for people of all ages?
- What potential benefits can you see in funding programs/projects that could benefit multiple generations?
- How are older adults impact —or are impacted by — your current work?
- How can you capitalize on the extensive assets and contributions older adults could make to help the communities you serve in in Arizona?

The research is intended to help AGF understand how you think about these issues. We are also seeking your advice on future avenues we might pursue to help Arizona communities better prepare for emerging efforts to build healthy communities.

As a key grantmaker in Arizona, we are asking if you would participate in a 30-45 minute interview with our professional consultant, Carolyn Holmes, PhD, to share your thoughts and give us some recommendations on future endeavors AGF might support. Dr. Holmes will be contacting you shortly to find the most convenient day and time to conduct the interview, which she will do either in person or by phone. Be assured that all your responses will remain confidential. Or, if you would like to contact her, please call her at 623-680-6770 or at Carolyn@HolmesResearchConsulting.com.

We will alert you when the research summary is posted on the AGF website so you can see what great ideas emerged from the research with you and your peers.

Thank you so much for your willingness to contribute to this very important research.

Sincerely,

Marissa Theisen
President & CEO
Appendix D. EngAGEm ent Research Interview and Focus Group Questions

1. How do you define the communities served within your major funding priorities? (Geographic, interest group, etc.?)
   a. How do you currently address the issues you are concerned about within these communities (educational grants, infrastructure, and/or capacity building grants)?

2. AGF is committed to helping funders in Arizona work together to build vibrant communities that work for people of all ages.
   - What exemplifies the best community building experience you have seen within the scope of your programs?
   - Describe a program or project funded by your organization that might have achieved this goal and contributed to “building community,” whether it was an intended or unintended outcome of the program.

3. As you look at your funding priorities, how do older adults impact your target population – or are impacted by your programs – if at all? Probes, if needed:
   a. Any overlap between helping your target audiences and involving older adults?
   b. Cross generational interactions in your funded programs and communities?
   c. Challenges you face in supporting cross-generational programs?

4. We know that your current funding priorities may not include a focus on older adults, but let me share a few facts about how the nature of our communities are changing because of older adults. Show exhibit packet.
   a. Does this information/data surprise you?
   b. Given this data, would you be more inclined to consider how you might factor older adults in future funding decisions? If not, why not?

5. One way funders who have not historically funded aging have capitalized on this trend is to consider older adults as a huge potential resource for their communities and the nonprofits which serve these communities.
   a. What possibilities do you see that would work within your grantmaking programs for adopting a purposeful intergenerational, community building approach to more fully utilize older adults and their skills?
   b. If you were to support more cross-generational collaboration what might you see as potential benefits?

6. Our final topic today is to explore some ideas about how to generate more purposeful activities to create healthy communities across our state that work for people of all ages. Call attention to Exhibit # 7.
   a. What is your foundation’s/agency’s level of interest in this idea? What creative intergenerational community building projects or programs might your organization seriously consider?
   b. How likely is it that your organization would consider the possibility of funding programs having intergenerational components (e.g., grandparents caring for grandchildren; mentoring by older adults with children; or a volunteer component that brings older adults in to help other age groups)?

7. What added information would you like to have in regard to what can be done to help you create more health and vibrancy in your communities? What more do you need to know?
8. Now, what can Arizona Grantmakers Forum do for you? How can we help meet your information
needs around these topics, or others that interest or concern you?

Thank you for your participation in this important research. We will send you a link to the report
on AGF’s website when it is done and be in touch with you about the efforts to improve the lives of
all Arizonans.
Appendix E. EngAGEment Research Exhibits for Discussion with Funders
May 31, 2012

Dear Colleagues,

Thank you for your participation in our EngAGEment Initiative Focus Groups and Executive In-depth Interviews!

The attached packet provides selected information in the form of statements, facts and figures. The information is offered to you as a way to highlight an issue we will face together as funders and as citizens – our rapidly aging population.

We can let the needs of older adults become a drain on our limited social, environmental and medical resources or we can find ways to capitalize on the assets and skills older adults have spent a lifetime building. We could work together to meaningfully engage them in building more healthy neighborhoods and communities, whether that be in schools, social service agencies, medical systems, or the arts and cultural venues.

For more information, please call me directly or go to AGF’s Grantmakers in Aging webpage: (http://www.arizonagrantmakersforum.org/programs/GrantmakersAging.aspx)

Best Regards,

Marissa Theisen
President & CEO
Exhibit 1. Trends in Aging in America, Arizona and in AZ Counties

http://www.census.gov/population/www/projections/summarytables.html

http://azstats.gov/population-projections.aspx
Exhibit 2. Facts and Figures About the Aging Population Trends in America

- About one in eight Americans are age 65 or above today. In 2030, one in five will be 65 and over (~19.3%).
- The sheer number of people age 65 or older will nearly double between 2000 and 2030.
- The total population growth in the US will be 17.7% from 2010 to 2030 (from 308 million in 2010 to 363 million in 2030) but in Arizona, the growth will be 61.4% (from 6.6 million in 2010 to 10.7 million in 2030). The growth in the 65+ population will be exponentially greater due to the baby boomers aging.
- As of January 1, 2011 the oldest of the baby boomers reached retirement age. From that day forward, 10,000 people each day will turn 65 years of age, and this will continue for many years. Someone in the U.S. will turn 65 every 20 seconds. This is a highly skilled, very active group of people who want to make a difference in their world and who seek to find meaningful ways to stay engaged without the commitment of a full time job.
- By mid-century, for the first time in human history, the number of people over 60 will outnumber children under the age of 14.
- Thanks to improving longevity, there are approximately six million Americans age 85 or older in 2010—twice as many as in 1990.
- In 2031, when the baby boomers begin reaching 85, the number of oldest old will begin rising rapidly, growing to an estimated 21 million by 2050.
- Two-thirds of American households have no children living in them today.
Exhibit 3. A Portrait of the Older Adult Population in America

- **Wealthy:** The average net worth of households headed by a person 65 years or older is the second highest of any age group.

- **In the Workforce:** Nearly 12% of those over 65 are in the work force, half of those are employed work part-time.

- **Skilled and Educated:** Older adults are better educated and have higher skill levels than any group that came before them--by 2025 almost one-third of those 65 and older will be college graduates.

- **Hale and Hearty:** Only 3% of older adults are in institutional care settings and 80% of people over 65 function well in their communities with no or only occasional help.

- **Politically Active:** Older adults are wielding significant political clout—they are more likely to vote than the rest of the population and 25% of city council members are 60 or older. This number that is growing, especially in small and medium-sized towns (National League of Cities).

- **Bring Assets and Resources:** Between 60 and 80% of those 65 and older volunteer, and one fourth of those 75 and older are still volunteering. Research strongly indicates that more would volunteer, if they were asked to do meaningful work. Volunteering has been shown to:
  - Improve the volunteers’ health and well being
  - Reduce isolation for older volunteers
  - Give volunteers’ a sense of meaning and purpose
  - Pass on wisdom and knowledge to younger generations
  - Open doors for new careers for older adults
  - Provide a significant economic ROI for staff time invested in managing volunteers (National Council on Aging)
“The aging society is an opportunity to be seized—provided we can learn to harness the talent and civic potential of our senior citizens. After all, our elder population is, quite possibly, this country’s only increasing natural resource.”

Marc Freedman, Civic Ventures.

“Many funders think primarily in terms of the needs of older adults as opposed to their role as assets for their community, The Benedict Foundation feels strongly that older adults are an important part of the solution, rather than just another problem.”

Barbara R. Greenberg, President of the Philanthropic Group and Foundation advisor to the Helen Andrus Benedict Foundation.
Exhibit 6. Frailty and Chronic Illnesses Affect a Small Percentage of Older Adults But ... A Rapidly Growing Group in Sheer Numbers

- Frailty Is Mainly in the Oldest Old: Most of those needing assistance are the oldest old--nearly half of those over the age of 85 need assistance with daily activities like dressing, bathing, or eating.

- Poverty Complicates Everything. Poverty—and all its ramifications—affects nearly 13% of older people and is felt disproportionately by women and people of color (National Women’s Law Center, September 2011).

- Many Raising Grandchildren: There are more than 2.7 million grandparent headed households in America, caring for more than 4.9 million children (Generations United, April 2011).

- Frail Older Adults are a small subset of those that have attained advanced age and remain vigorous; frail adults nevertheless have an importance out of proportion to their numbers -- there is a high toll in personal suffering, caregiver burden, and costs and demands on the health care system (Annals of Internal Medicine, 1999).

- Frailty Can Be Prevented: Frailty is a function of debilitating effects of chronic diseases coupled with lack of regular exercise – both of which can be combated with a healthy lifestyle and a social environment that brings meaning and purpose to older adults’ lives that will keep them engaged.
Exhibit 7. An Idea to Consider: An Arizona Initiative to Build Livable Communities for Children, Youth, Families and Older Adults

Key Question: While each funder, nonprofit organization and government agency makes contributions to the well-being of their target audiences working alone – would working together to create a collaborative initiative produce greater outcomes and achieve larger impacts across the state?

There are many models we could adopt, adapt or create. For illustration purposes, one model program was created by the World Health Organization in 2006. WHO brought together 33 cities in 22 countries for a project to help determine the key elements of the urban environment that support active and healthy aging. The result was The Global Age-friendly Cities Guide that outlines a framework for assessing the “age-friendliness” of a city. A core aspect of this approach was to include older people as active participants in the process. (http://www.who.int/ageing/publications)

What is the Age-friendly Cities Program?
The Age-friendly Cities Program is an international effort to help cities prepare for two global demographic trends: the rapid aging of populations and increasing urbanization. The Program targets the environmental, social and economic factors that influence the health and well-being of older adults.

The guide identifies eight domains of city life that might influence the health and quality of life of older people (and has all the dimensions needed to make a rural area productively support its residents, as well):

1. Outdoor spaces and buildings;
2. Transportation;
3. Housing;
4. Social participation;
5. Respect and social inclusion;
6. Civic participation and employment;
7. Communication and information; and
8. Community support and health services.
Exhibit 8. How to Build Older Adults into Existing Funding Strategies

Is your organization open to expanding your horizons to include older adults as recipients or resources, or both? If so, here are some quick and simple ways to begin the educational process and stimulate the dialogue about including older adults in your grantmaking:

- **Open up the discussions.** As you review requests for funding, ask your applicants (and yourselves) what it would take to include older people in the proposed activities.

- **Set the stage for changing mindsets.** Invite your existing grantees to think about ways older people might be involved in their work, either as resources, or as a population whose needs should be included in their work. Add one question to your standard funding application: “In what ways will this project or initiative engage or benefit older adults from your community?”

- **Change the rules.** Revise your foundation’s written guidelines and other communications tools to inform your current and potential grantees of your interest in older adults as an enhancement within your existing funding priorities.

- **Learn from your applicants and potential grantees.** Review new proposals that focus on older adults more carefully than you might have in the past. Try funding a few select projects that make sense to you. Set aside time to make site visits to see these programs in action, and learn more about whom they serve and how they work.

- **Partner with others already engaged in funding older adults.** Identify local and national funders in aging. Explain that you would like to learn more about aging and ask them to keep you in mind if they need funding partners.

- **Learn how others have done it.** Invite a colleague from another foundation committed to funding in the aging arena to attend your board meeting and brief you about their foundation’s funding in aging and how they got started.

- **Educate your teams:** Subscribe to newsletters and magazines of local and national aging organizations. Keep an eye out for articles about older adults in your local newspaper. Send your board members copies of informative articles that will help them learn about older adults, too. The American Society on Aging and the National Council on Aging have excellent publications on aging.
Appendix F. EngAGEment Research Thank You Letter

Date _____

Inside Address

Dear _______,

Thank you for your participation in our EngAGEment Initiative Focus Group in May. Your insights will enrich our research on how to support community building that incorporates a broader understanding of the tremendous contributions that older adults can make in many areas of interest to your organization.

We will keep you apprised of our plans for the funders’ educational program which is the final event for the EngAGEment Initiative planned for October. We will present the findings from our research and would like you to be a part of this important day, so will send a “save the date” note just as soon as the plans are firmed up.

I have included an overview of Arizona Grantmakers Forum for your information as well as a brief description of the EngAGEment Initiative for your information.

If you have any questions, please call me directly or go to AGF’s Grantmakers in Aging webpage: (http://www.arizonagrantmakersforum.org/programs/GrantmakersAging.aspx)

Best Regards,

Marissa Theisen
President & CEO
Appendix G. EngAGEment Initiative Overview Handout
In the United States, the first of 78 million boomers turned 65 in January 2011. By 2020:

- In Arizona, citizens aged 60 and over will constitute 25% of the state’s population.
- The 85+ population, the fastest growing age group, is expected to increase by 141%.
- While many are predicting staggering economic costs associated with this demographic wave, older adults also represent enormous potential community resources.

Grantmakers will increasingly be called upon to help mitigate the adverse societal impacts of this demographic shift. Just as importantly, they also can play a significant role in helping communities capitalize on the assets and skills older Americans in seeking solutions for challenges we face.

In January 2011, AGF launched a two-year EngAGEment project designed to build grantmaker interest and momentum around aging issues and ultimately to increase funders investments in this area.

The Initiative focuses on three specific areas for supporting older adults:

- **Civic Engagement** -- to maximize the contributions older adults can make in improving our neighbors and communities through intergenerational projects.
- **Economic Security** -- to raise awareness of the impact they have on the fiscal viability of our communities and our state, as well as how to connect older adults with benefits that will help them reach economic security and bring more dollars into the state.
- **Communities that Work for People of all Ages** -- to support efforts to engage people from all ages in working together to improve the livability of their communities.

In 2011, AGF hosted three programs that provided funders with the opportunity to build a solid, shared knowledge base that included best practices from around the country. The programs included participation from nonprofits and government agencies that serve older adults and contributed to the dialogue emerging in Arizona about finding viable, shared community solutions. In 2012, AGF is conducting a formative assessment of Arizona funders about the communities they serve and how the assets of older adults can increase their capacity to better serve their constituencies. In collaboration with other initiatives to improve the livability of Arizona communities, AGF will host a Funders’ Round Table to present the results of the research and present opportunities to collaborate in supporting community building efforts across the state that improve the lives of people of all ages.

Ultimately we hope to create an ongoing learning community of funders, nonprofits and government agencies that operates with a shared understanding of what’s needed, what works and what’s possible to enhance the quality of life for Arizona’s older adults.

The Initiative is supported by a grant from Grantmakers in Aging with matching funds provided by our local partners: Arizona Community Foundation, BHHS Legacy Foundation, St. Luke’s Health Initiatives and Virginia G. Piper Charitable Trust.