

December 30, 2014

TO: Members of the MAG Human Services Technical Committee

FROM: Naomi Farrell, City of Tempe, Chair

SUBJECT: MEETING NOTIFICATION AND TRANSMITTAL OF AGENDA

Meeting - 1:30 p.m.
Thursday, January 8, 2015
MAG Office, Second Floor, Chaparral Room
302 North 1st Avenue, Phoenix

The next MAG Human Services Technical Committee (HSTC) meeting will be held at the time and place noted above. Members of the Human Services Technical Committee may attend either in person or by phone. Supporting information is enclosed for your review.

The meeting agenda and resource materials are also available on the MAG website at www.azmag.gov. In addition to the existing website location, the agenda packet will be available via the File Transfer Protocol (FTP) site at: <ftp://ftp.azmag.gov/HumanServicesTechnicalCommittee>. This location is publicly accessible and does not require a password.

Please park in the garage underneath the building. Bring your ticket to the meeting, parking will be validated. For those using transit, the Regional Public Transportation Authority will provide transit tickets for your trip. For those using bicycles, please lock your bicycle in the bike rack in the garage.

In 1996, the Regional Council approved a simple majority quorum for all MAG advisory committees. If the Human Services Technical Committee does not meet the quorum requirement, members who have arrived at the meeting will be instructed a legal meeting cannot occur and subsequently be dismissed. Your attendance at the meeting is strongly encouraged.

Pursuant to Title II of the Americans with Disabilities Act (ADA), MAG does not discriminate on the basis of disability in admissions to or participation in its public meetings. Persons with a disability may request a reasonable accommodation, such as a sign language interpreter, by contacting the MAG office. Requests should be made as early as possible to allow time to arrange the accommodation.

If you have any questions, please call the MAG office.

MAG HUMAN SERVICES TECHNICAL COMMITTEE
TENTATIVE AGENDA
January 8, 2015

COMMITTEE ACTION REQUESTED

1. Call to Order

2. Call to the Audience

An opportunity will be provided to members of the public to address HSTC on items not scheduled on the agenda that fall under the jurisdiction of MAG, or on items on the agenda for discussion but not for action. Citizens will be requested not to exceed a three minute time period for their comments. A total of 15 minutes will be provided for the Call to the Audience agenda item, unless HSTC requests an exception to this limit. Please note that those wishing to comment on agenda items posted for action will be provided the opportunity at the time the item is heard.

3. Approval of the December 11, 2014 Meeting Minutes

The draft minutes for the December 11, 2014 meeting are posted with the meeting materials.

4. Draft Social Services Block Grant Funding Recommendations

Each year, the Maricopa Association of Governments (MAG) serves as an informal conduit for local input on Social Services Block Grant (SSBG) allocation recommendations. In December, the Committee reviewed the draft community responses of the SSBG ranking exercise and heard presentations from experts in the field on Adults, Families & Children; Elderly; Persons with Disabilities; and Persons with Developmental Disabilities.

The Committee will review results of the Committee service ranking exercise and take action on the draft funding recommendations to be presented to the Human Services Coordinating Committee in January. The draft

2. Information.

3. Approve the HSTC December 11, 2014 Meeting Minutes.

4. Recommend approval of the draft Social Services Block Grant funding recommendations.

funding recommendations will be provided at the meeting.

5. Engaging Experienced Older Adults in the Greater Phoenix Global Economy

A report will be offered on the Thunderbird School of Global Management's study of the economic impact of older adults. The project addresses the growing adult 65+ population and the economic impact that it will have in Maricopa County through 2050. The Thunderbird School of Global Management report on Engaging Experienced Older Adults in the Greater Phoenix Regional Economy is posted with the meeting materials.

6. FY 2016 Committee Outcome Measures

In December, the Committee received an update on progress made on the FY 2015 outcome measures and discussed draft outcomes measures for the FY 2016 MAG Unified Planning Work Program. The Committee requested an opportunity to review of the draft goals for FY 2016 to allow for additional input. The draft outcome measures are posted with the meeting materials.

7. Arizona Age-Friendly Network

An update will be offered on activities of the Arizona Age-Friendly Network including plans for a spring conference and rural collaborative with Indiana site visit scheduled for January 14-16, 2015.

8. Request for Future Agenda Items

Topics or issues of interest that the MAG Human Services Technical Committee would like to have considered for discussion at a future meeting will be requested.

9. Comments from the Committee

An opportunity will be provided for HSTC members to present a brief summary of current

5. Information and discussion.

6. Recommend approval of the FY 2016 outcomes measures to be included in the FY 2016 MAG Unified Planning Work Program.

7. Information, discussion and possible action.

8. Information and discussion.

9. Information.

events. HSTC is not allowed to propose, discuss, deliberate or take action at the meeting on any matter in the summary, unless the specific matter is properly noticed for legal action.

Adjournment

MINUTES OF THE
MAG HUMAN SERVICES TECHNICAL COMMITTEE
December 11, 2014
MAG Office Building, Chaparral Room
Phoenix, Arizona

MEMBERS ATTENDING

Riann Balch, City of Phoenix	*Jeffrey Jamison, City of Phoenix
*Kristina Blea, City of Phoenix	Jim Knaut, Area Agency on Aging
#Eugenio Munoz for Jan Cameron, City of Scottsdale	Jacqueline Edwards for Bruce Liggett, Maricopa County Human Services Department
#Lisa Elena Vallejo and Naomi Farrell, City of Tempe, Chair	Joyce Lopez-Powell, Valley of the Sun United Way
#Jessica Fierro, Town of Gilbert	#Caterina Mena, Tempe Community Council
Janeen Gaskins, City of Surprise	*Debbie Pearson, City of Peoria
#Jessica Gonzalez, City of Phoenix	*Christina Plante, City of Goodyear
Laura Guild, Arizona Department of Economic Security	#Leah Powell, City of Chandler
#Ilene Herberg, Arizona Department of Economic Security / Division of Developmental Disabilities	*Cindy Saverino, Arizona Department of Economic Security
	Stephanie Small, City of Avondale, Vice Chair

*Neither present nor represented by proxy.
#Attended by telephone conference call.
+Attended by videoconference.

OTHERS PRESENT

Cynthia Zwick, Arizona Community Action Association	Rachel Brito, MAG
Beth Rosenberg, Children's Action Alliance	DeDe Gaisthea, MAG
# Erica McFadden, ASU Morrison Institute for Public Policy	Amy St. Peter, MAG
Kathy Chandler, Northwest Valley Connect	

1. Call to Order

Stephanie Small, City of Avondale, Vice Chair, called the meeting to order at 1:31 p.m. Introductions ensued.

2. Call to the Audience

An opportunity was provided for members of the public to address the Committee. No public comments were made.

3. Approval of the November 13, 2014 HSTC Meeting Minutes

A motion to approve the November 13, 2014, meeting minutes was requested. Jim Knaut, Area Agency on Aging, motioned to approve the minutes. Janeen Gaskins, City of Surprise, seconded the motion. The motion passed unanimously.

4. Children's Action Alliance

Vice Chair Small welcomed Beth Rosenberg, Children's Action Alliance, a statewide child advocacy organization, to offer a report on the welfare of children in Arizona. Ms. Rosenberg offered a brief history of the discovery of 6,500 uninvestigated cases of child abuse and neglect and subsequent steps initiated by the Governor's office to investigate each case, system issues, and to creation of the Department of Child Safety (DCS).

Ms. Rosenberg advised that as of the end of October 2014, DCS has hired all new appropriated staff. Additionally, the hotline has shown great improvement in the response time and a decrease in the percentage of dropped calls. Ms. Rosenberg noted Children's Action Alliance is very supportive of DCS and Director Charles Flanagan but noted uncertainty in the future of DCS given the change in administration.

There are approximately 17,000 children in foster care and the numbers are increasing. This represents a 15 percent increase from June 2013 and caseloads remain high at roughly 40-45 cases per worker. It was noted that new staff is in training and not yet prepared to be working in the field. Ms. Rosenberg advised there are too many children in congregate care/group home settings and sleeping in offices due to the lack of available beds. The courts are also overwhelmed by the high number of children in foster care, lack of service providers, and a greater number of children entering the system than those exiting the system.

Ms. Rosenberg noted the quantity and quality of services to support the process for reunification is not where it needs to be. The permanency goal is to reunify children with their families although many go on to adoption or guardianship. Brief information was shared about a crossover pilot project at juvenile court to address issues where children are adjudicated by the court, but are also referred to the court for delinquency matters.

In terms of new initiatives, Ms. Rosenberg shared information on a waiver allowing the state to utilize funds for prevention and intervention programs; differential response which is an alternative response system in which low risk and potential abuse reports would go directly to community based providers; a safe reduction task force; and efforts to establish of a Community Advisory Board.

Ms. Rosenberg shared a handout on Overcoming Adverse Childhood Experiences (ACE) and a draft report ACEs in Arizona. She noted efforts both nationally and

internationally to inform cities and counties how they can participate in prevention efforts and encouraged the Committee to share this with their communities. Ms. Rosenberg noted a desperate need for foster homes, mentors, and support for grandparents raising grandchildren. She noted prevention is in the legislation as being a duty of DCS, however there is no funding allocated for prevention efforts. The department is seeking partners to work on prevention activities.

Additionally, CAA has a project underway to try to improve the outcomes for more than 800 kids who leave foster care over the age of 18 without families. She noted efforts to provide supportive environments and information for them that lead to greater opportunities for employment, internships, housing, or job training. Ms. Rosenberg noted a grant opportunity available for disconnected youth aged 14 and older. Ms. Rosenberg provided contact information for anyone seeking additional information.

5. Social Services Block Grant (SSBG) Target Group Presentations

Vice Chair Stephanie Small welcomed guest speakers to present on the SSBG target groups for Adults Families and Children; Elderly; Persons with Disabilities; and Persons with Developmental Disabilities.

Cynthia Zwick, Arizona Community Action Association, presented on Adults, Families and Children and poverty statistics in Arizona. Ms. Zwick shared information on the beliefs of Americans based on a study conducted by the Center for American Progress. She noted 61 percent of Americans say their family's income is falling behind the cost of living. It was noted Americans strongly believe that poverty is primarily the result of a failed economy rather than the result of personal decision or lack of effort. The public's priorities for reducing poverty are jobs, wages and education.

Ms. Zwick provided an overview of statistics for persons living in Arizona noting 18.6 percent of Arizonans live in poverty. Arizona has dropped from fifth to eighth place for the state with highest rate of poverty. However, it was noted 23.4 percent of Arizona's jobs are low-wage and 45.7 percent of the population are liquid asset poor. This indicated a lack of savings to cover basis expenses for three months should they become unemployed or face an emergency or crisis situation. Additional information was shared on increased college tuition and debt and the use of sub-prime lending products.

Ms. Zwick noted affordable housing, emergency services, and livable wages remain huge issues for Arizonans. She concluded with information shared at a conference in Washington, D.C. that indicates social services programs will be under attack in the upcoming congressional year. She added SSBG and the earned income tax credits are particularly vulnerable due to their flexibility.

Jim Knaut, Area Agency on Aging, presented home and community based services for the elderly. Information was presented on the Senior Adult Independent Living (SAIL) program. Mr. Knaut provided an overview of services and descriptions funded through SSBG. The total clients waiting for services are 824; those waiting for respite services are 213 and the numbers are increasing. On average, the wait list is more than one year, however, Mr. Knaut noted that persons calling for assistance are in need of immediate assistance. Participants work with a case manager to determine eligibility for services that are contracted through Maricopa County. Mr. Knaut provided an overview of partnerships with service providers throughout the County. He concluded noting the challenges are significant and funding remains inadequate.

Erica McFadden, ASU Morrison Institute for Public Policy, provided an update on the research completed through Arizona Developmental Disability Planning Council. Ms. McFadden advised there are approximately 68,000 residents in Maricopa County with developmental disabilities, however, only one-third are receiving services through the Division of Developmental Disabilities.

Ms. McFadden noted employment barriers persist in Maricopa County. An overview of employment statics was given for those not in the labor force, unemployed, and employed. Along with unemployment rates, post-school outcomes survey findings indicate that 46 percent of persons with intellectual disabilities are not working or in school after high school. Vocational rehabilitation rates in Arizona while slightly improving still face multiple challenges. Ms. McFadden noted a critical shortage of services for adults with autism and a lack of integrated employment programs.

Kathy Chandler, Northwest Valley Connect, addressed the Committee on persons with disabilities. Northwest Valley Connect is a new non-profit working on mobility management and transportation in the Northwest Valley. Ms. Chandler noted the call center has been open since September 2014. To date, they have received 250 calls; 85 percent of the calls are from seniors looking for transportation. Ms. Chandler shared stories on the needs of those individuals seeking transportation assistance. Fifteen percent of the calls are not seniors, but have disabilities; three percent of callers have low-income. Issues identified by individuals seeking transportation include low-incomes, transportation needs to services/locations not included by transportation providers, and hours of operation. Ms. Chandler stressed that when considering other services, transportation continues to be one of the greatest needs. Vice Chair Small added that transportation is a major issue impacting residents in the West Valley she noted that while services may exist, a huge gap remains in how to get to those services.

Vice Chair Small transitioned to Amy St. Peter to present on the Social Services Block Grant activities. Ms. St. Peter addressed the Committee providing an overview of the process undertaken this year to develop the draft funding recommendations. It was noted in past years, the Human Services Coordinating Committee and Human Service Technical Committee have completed the service ranking exercise along with

the community. This year, the HSTC and HSCC will take into consideration the community ranking results to help inform the process.

The Committee discussed different options to consider for completing the service ranking exercise. Discussion ensued on whether the Committee would follow the process to rank services within target groups as done by the community or if they would rank all services regardless of target group. It was noted that staff would need to clearly state the steps taken by the community versus those taken by the Committee to complete the service ranking exercise.

Ms. St. Peter noted the community ranking results will inform the Committee about the most critical needs in the community based on input received by community members who completed the survey. She suggested one option would be to apply funding to each target group and allocate percentages to each service based on need.

Jacqueline Edwards suggested it would be necessary for the Committee to rank all services given that they are making recommendations based on the total funding available. She noted her preference not to proportionally decrease the funding to services with a greater need by applying equal amounts per target group. Ms. Edwards inquired if it would be possible to view an overall ranking by the Committee as well as an overall ranking which also takes into consideration the community ranking results. Ms. Gaskins expressed agreement.

Discussion ensued on the funding formula and the need to take into account the number of responses when developing the service ranking scores. Ms. St. Peter supported the recommendation but noted the funding formula would need to be revisited given the different steps taken by the community and the Committee to complete the service ranking.

Ms. St. Peter expressed concern that the funding recommendations would be disproportionate as some services received greater input from the community than others. Ms. Gaskins noted it was unclear that anyone could complete the service ranking exercise and that it was not intended to be completed as a group exercise per city, town, or agency.

Jim Knaut, Area Agency on Aging, noted in past years, the service ranking exercise has been forwarded to all providers resulting in a disproportionate response for one target group versus others. He noted the challenge is getting people to respond to the survey. Ms. Edwards noted great value in having community input and requested information on the number of community responses received.

Ms. St. Peter summarized the options being considered:

Option 1: The Committee would rank all services taking into consideration the community service ranking results.

Option 2: The Committee would rank services within the target groups following the community process. Additionally, the Committee would indicate the proportion of funding each target group should receive.

The Committee would also review additional information including the number of community responses received per target group and a three year history of funding percentage and dollar amount per target group.

The Committee expressed agreement for proceeding with the second option. Staff will work to compile the information, distribute it to the Committee and develop the draft funding recommendations for review at the January HSTC meeting.

6. FY 2016 Committee Outcome Measures

Ms. St. Peter provided an overview of the human services major regional goals/work emphasis for FY 2015 and proposed work emphasis areas for FY 2016. Ms. St. Peter highlighted the goals and outcomes that fall under the purview of HSTC. Input was requested on the proposed topics and feedback on efforts to address for next year.

A request was made to allow the Committee an opportunity to review the documents and discuss at a future meeting. Ms. St. Peter encouraged the Committee to review the proposed goals and any bring back any suggestions for proposed projects that have a regional aspect for consideration.

Ms. St. Peter shared information on an article featuring the Greater Phoenix Age-Friendly Network written by Encore.org and Experience Matters. Additional information was provided on the Steps to Create Age-Friendly Communities tool-kit. The toolkit is available in hard copy or on www.connect60plus.com.

7. Request for Future Agenda Items

Committee members were given an opportunity to suggest topics or issues of interest they would like to have considered for discussion at a future meeting. There were no requests submitted.

8. Comments from the Committee

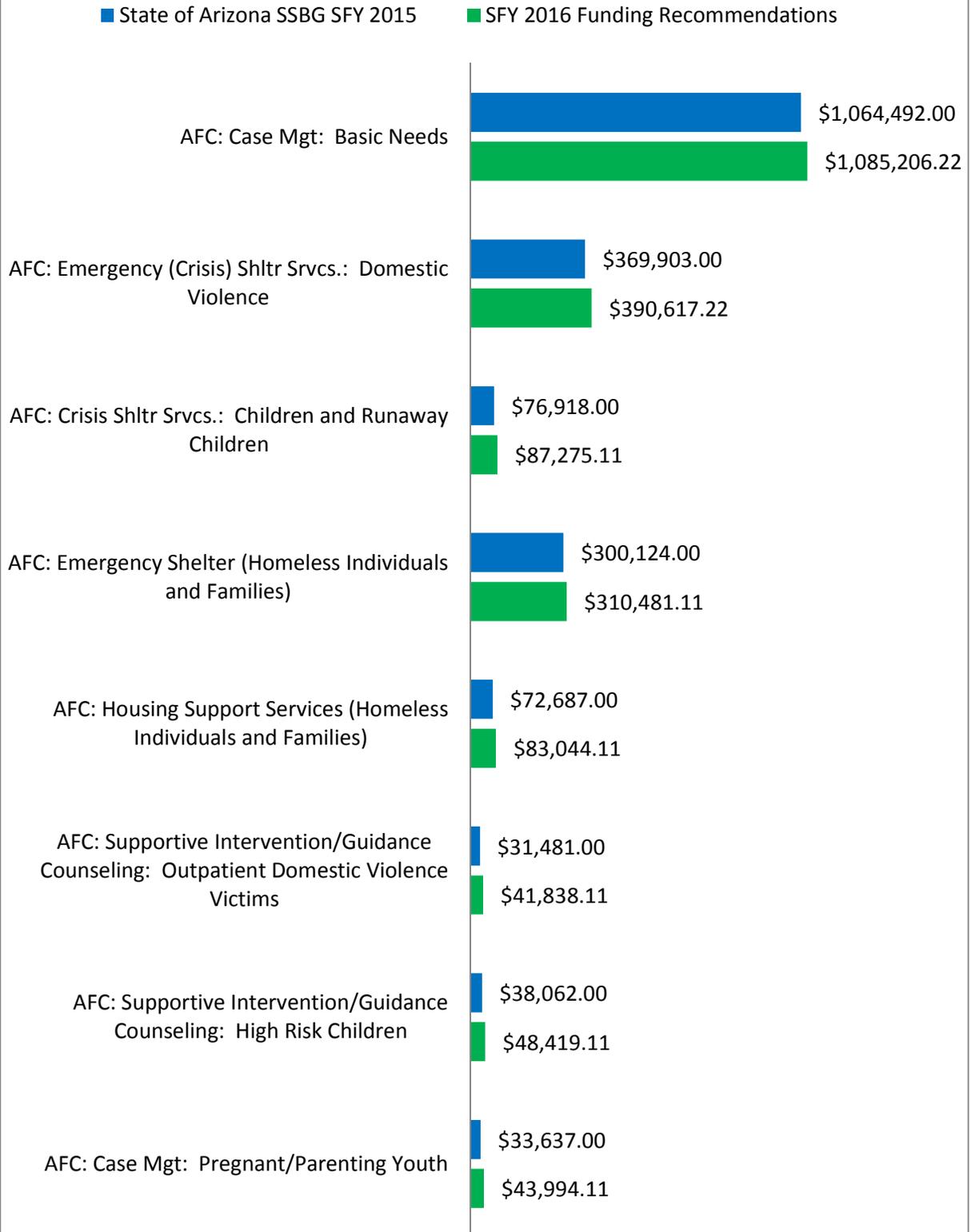
Committee members were given the opportunity to share comments or information related to community events. No additional information was shared.

The meeting adjourned at 3:03 p.m. The next meeting is scheduled for January 8, 2015, at 1:30 p.m.

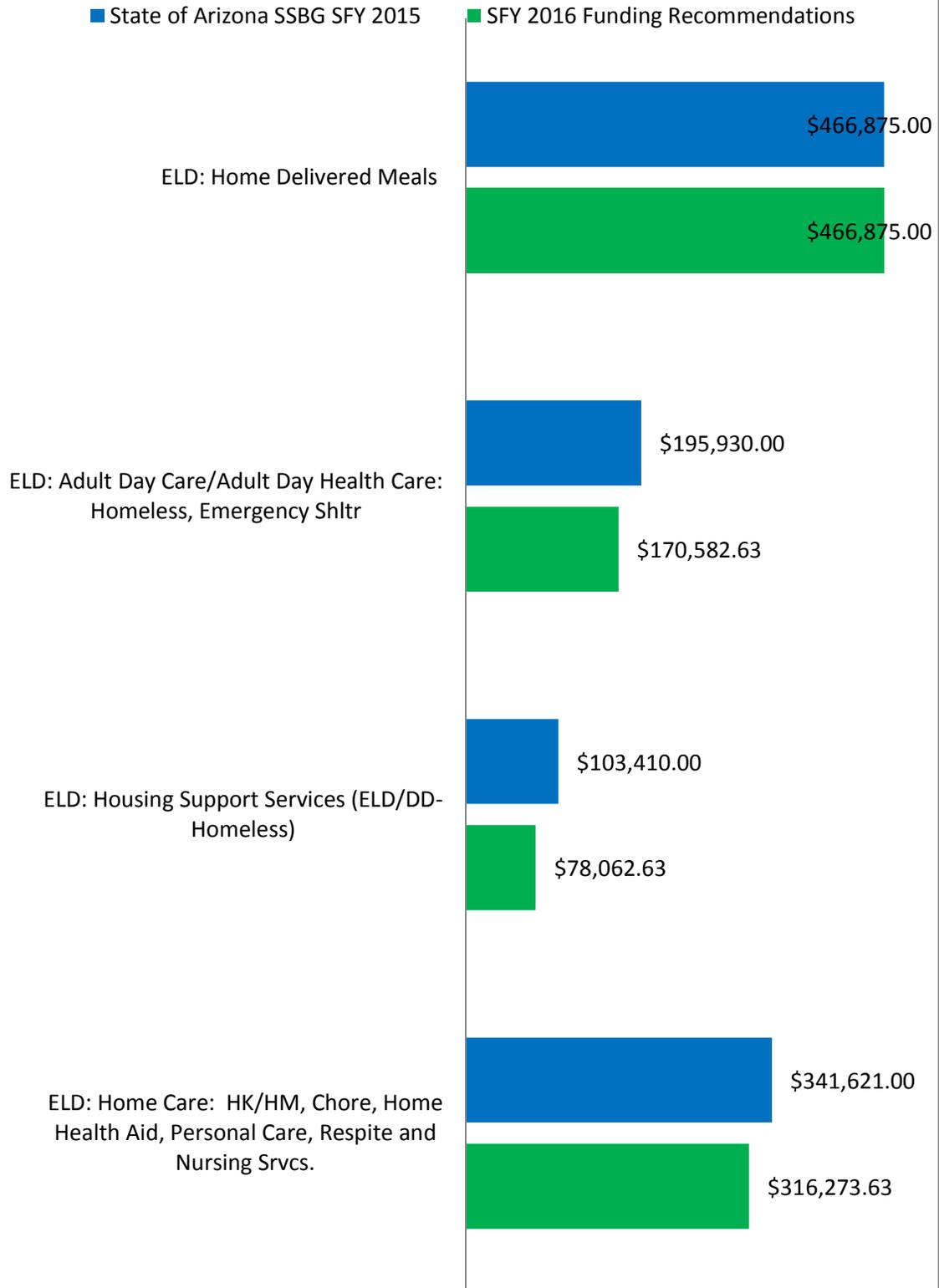
Social Services Block Grant
Draft SFY 2016 Funding Recommendations
January 8, 2015

Target Group	Committee Service Ranking	Percent +/-	Service Title & Service Ranking Across Target Group	State of Arizona SSBG SFY 2015	Committee Recommended Funding per Target Group	Funding difference applied (+/-)	SFY 2016 Funding Recommendations
AFC	5.2	0.20	AFC: Case Mgt: Basic Needs	\$ 1,064,492.00		\$ 20,714.22	\$ 1,085,206.22
AFC	4.1	0.20	AFC: Emergency (Crisis) Shltr Svcs.: Domestic Violence	\$ 369,903.00		\$ 20,714.22	\$ 390,617.22
AFC	3.9	0.10	AFC: Crisis Shltr Svcs.: Children and Runaway Children	\$ 76,918.00		\$ 10,357.11	\$ 87,275.11
AFC	3.9	0.10	AFC: Emergency Shelter (Homeless Individuals and Families)	\$ 300,124.00		\$ 10,357.11	\$ 310,481.11
AFC	3.5	0.10	AFC: Housing Support Services (Homeless Individuals and Families)	\$ 72,687.00		\$ 10,357.11	\$ 83,044.11
AFC	3.4	0.10	AFC: Supportive Intervention/Guidance Counseling: Outpatient Domestic Violence Victims	\$ 31,481.00		\$ 10,357.11	\$ 41,838.11
AFC	2.3	0.10	AFC: Supportive Intervention/Guidance Counseling: High Risk Children	\$ 38,062.00		\$ 10,357.11	\$ 48,419.11
AFC	1.7	0.10	AFC: Case Mgt: Pregnant/Parenting Youth	\$ 33,637.00		\$ 10,357.11	\$ 43,994.11
		1.00		\$ 1,987,304.00	2,090,875.08	\$ 103,571.08	\$ 2,090,875.08
DD	3.4		DD: Ext Supported Empl Svcs: Individuals with DD in need of work training opps.	\$ 202,456.27			\$ 202,456.27
DD	2.8		DD: Ext. Supported Empl. Svcs.: Individuals with DD who reside in the family home and are in need of work training \ opps.	\$ 14,819.78			\$ 14,819.78
DD	1.4	0.15	DD: Attendant Care Svcs.	\$ 11,971.50		\$ (3,664.78)	\$ 8,306.72
DD	1.4	0.15	DD: Habilitation Svcs.	\$ 4,469.42		\$ (3,664.78)	\$ 804.64
DD	1.1	0.70	DD: Respite Service	\$ 18,938.80		\$ (17,102.33)	\$ 1,836.47
		1.00		\$ 252,655.77	228,223.88	\$ (24,431.90)	\$ 228,223.88
ELD	2.4		ELD: Home Delivered Meals	\$ 466,875.00			\$ 466,875.00
ELD	1.4	0.33	ELD: Adult Day Care/Adult Day Health Care: Homeless, Emergency Shltr	\$ 195,930.00		\$ (25,347.38)	\$ 170,582.63
ELD	1.3	0.33	ELD: Housing Support Services (ELD/DD-Homeless)	\$ 103,410.00		\$ (25,347.38)	\$ 78,062.63
ELD	1.0	0.33	ELD: Home Care: HK/HM, Chore, Home Health Aid, Personal Care, Respite and Nursing Svcs.	\$ 341,621.00		\$ (25,347.38)	\$ 316,273.63
		1.00		\$ 1,107,836.00	1,031,793.88	\$ (76,042.13)	\$ 1,031,793.88
PwD	4.6		PwD: Home Delivered Meals	\$ 19,655.00			\$ 19,655.00
PwD	3.6		PwD: Congregate Meals	\$ 11,144.00			\$ 11,144.00
PwD	3.3		PwD: Rehabilitation Instructional Svcs.	\$ 2,343.31			\$ 2,343.31
PwD	2.6	0.25	PwD: Supported Empl., Ext.	\$ 38,363.79		\$ (774.19)	\$ 37,589.60
PwD	2.5	0.25	PwD: Adult Day Care/Adult Day Health Care	\$ 8,208.00		\$ (774.19)	\$ 7,433.81
PwD	2.3	0.25	PwD: Home Care	\$ 26,371.00		\$ (774.19)	\$ 25,596.81
PwD	2.1	0.25	PwD: Adaptive Aids/Devices	\$ 2,243.84		\$ (774.19)	\$ 1,469.65
		1.00		\$ 108,328.94	105,232.17	\$ (3,096.77)	\$ 105,232.17
				\$ 3,456,124.71	\$3,456,125.00		\$ 3,456,125.00

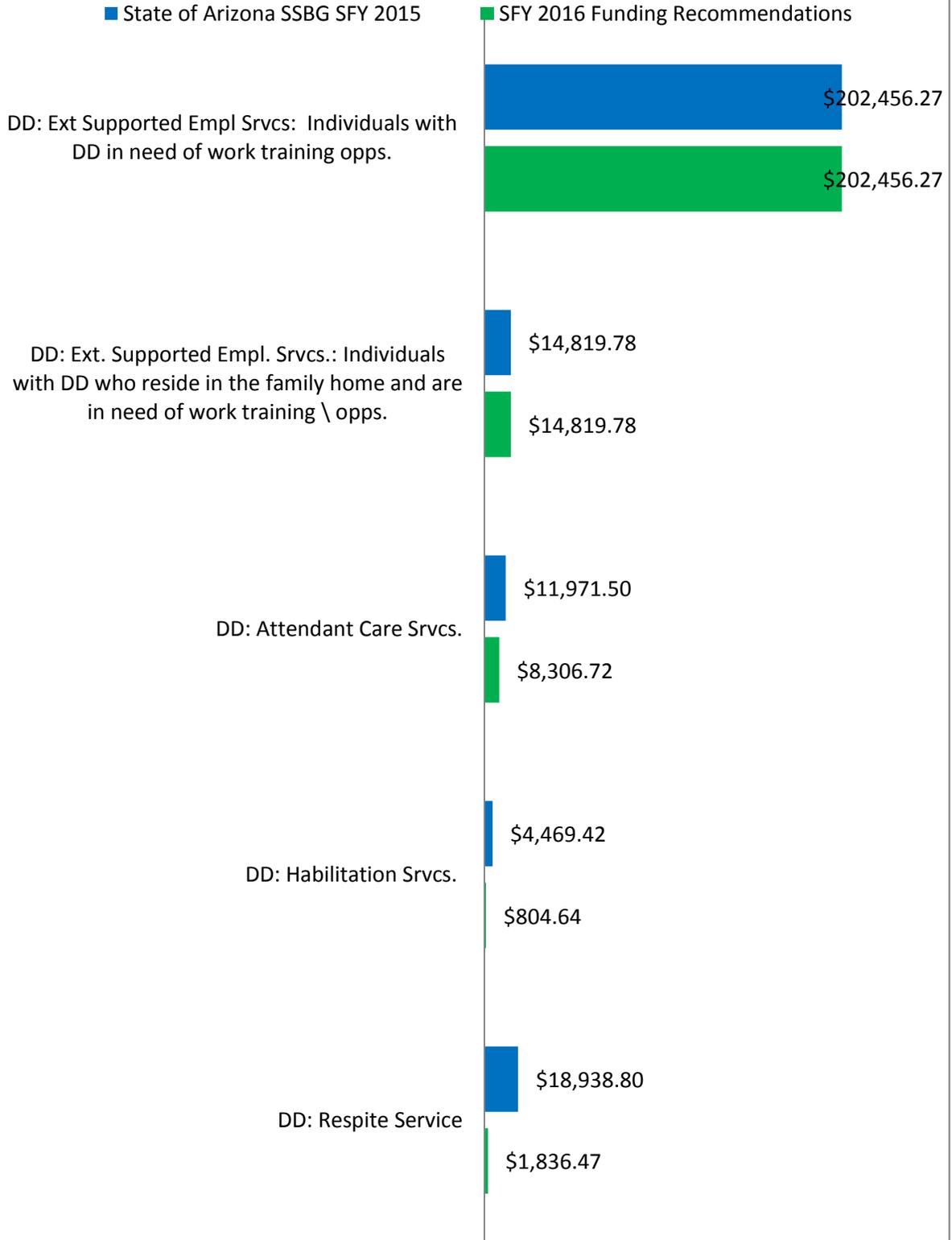
Social Service Block Grant Adults, Families & Children SFY 2016 Draft Funding Recommendations



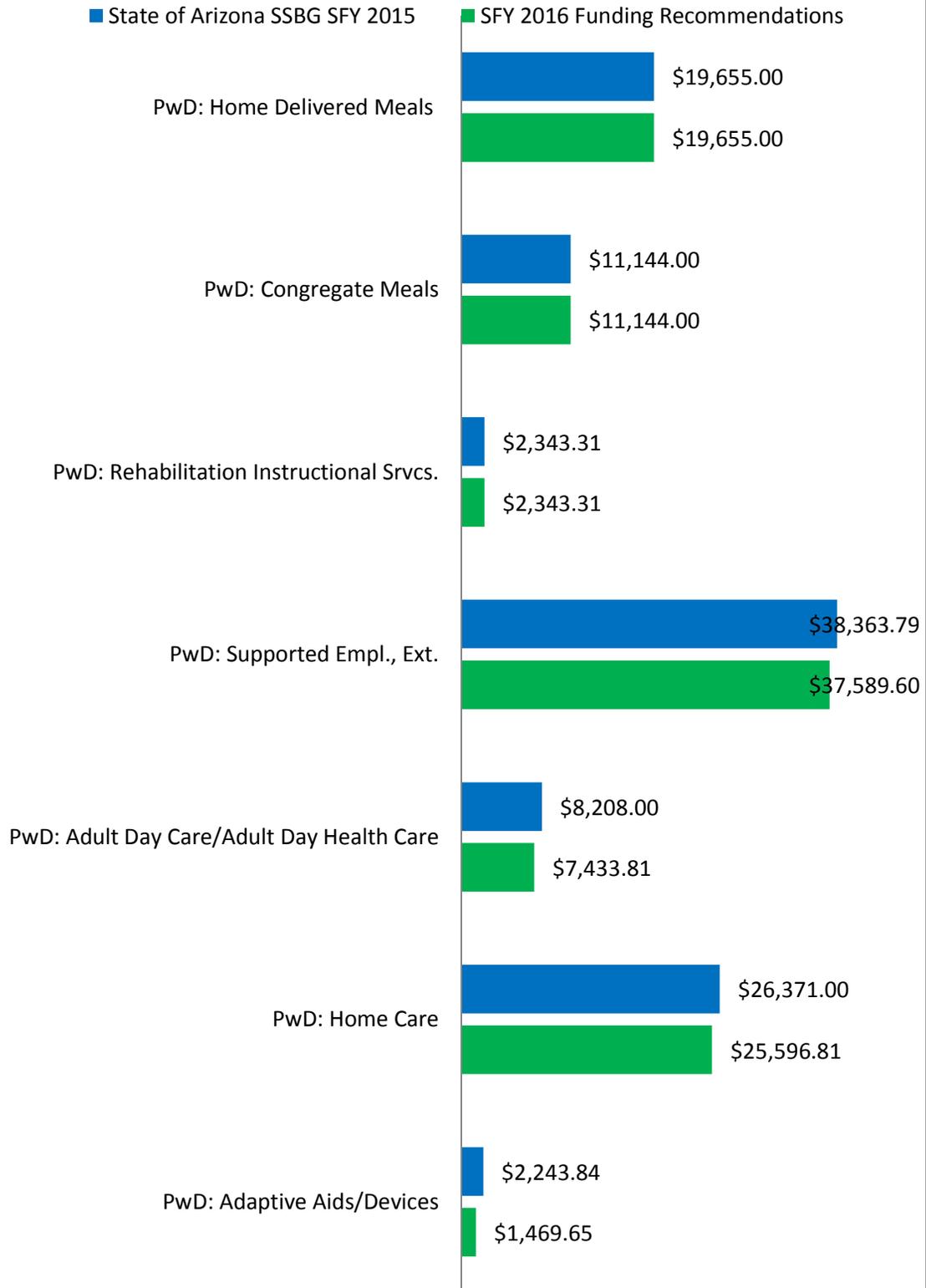
**Social Service Block Grant
Elderly
SFY 2016 Draft Funding Recommendations**



**Social Service Block Grant
Developmental Disabilities
SFY 2016 Draft Funding Recommendations**



**Social Service Block Grant
Persons with Disabilities
SFY 2016 Draft Funding Recommendations**



**Social Services Block Grant
Service Ranking Comparison
January 8, 2015**

SERVICE RANKING RESULTS		
Persons with Developmental Disabilities	Committee Program Ranking	Community Program Ranking
DD - Empl. Related Services (Special Empl. Opps)	3.4	2.3
DD - Empl. Related Services (In Family Home)	2.8	1.6
DD - Habilitation Services	1.4	2.4
DD - Attendant Care / Personal Assistance	1.4	2.2
DD - Respite	1.1	1.5
Adults, Families & Children	Committee Program Ranking	Community Program Ranking
AFC - Case Mgt. (Basic Needs)	5.2	3.4
AFC - Emergency Shelter - AFC (Victims of Domestic Violence)	4.1	4.7
AFC - Crisis Shelter Services (Children and Runaway Children)	3.9	3.8
AFC - Emergency Shelter - AFC (Homeless Families & Individuals)	3.9	4.9
AFC - Supp. Interven./Guid. Counsel. - AFC-DV	3.4	3.3
AFC - Housing Support Services (Homeless Individuals and Families)	3.5	3.2
AFC - Supp. Interven./ Guid. Counsl - Children at High Risk	2.3	3.0
AFC - Case Mgt. (Pregnant /Parenting Youth)	1.7	1.6
Elderly	Committee Program Ranking	Community Program Ranking
ELD - Home Delivered Meals	2.4	1.8
ELD - Adult Day Care/ Adult Day Health Care	1.4	1.5
ELD - Housing Support Services (ELD/DD - Homeless)	1.3	0.8
ELD - Home Care	1.0	2.0
Persons with Disabilities	Committee Program Ranking	Community Program Ranking
PwD - Home Delivered Meals	4.6	2.7
PwD - Congregate Meals	3.6	2.3
PwD - Rehabilitation Instruction Services	3.3	4.1
PwD - Supported Empl., Extended	2.6	3.0
PwD - Adult Day Care/ Adult Day Health Care	2.5	3.9
PwD - Home Care	2.3	3.0
PwD - Adaptive Aids & Devices	2.1	2.0

TOTAL NUMBER OF SURVEYS:

Community: 31

Committee: 13

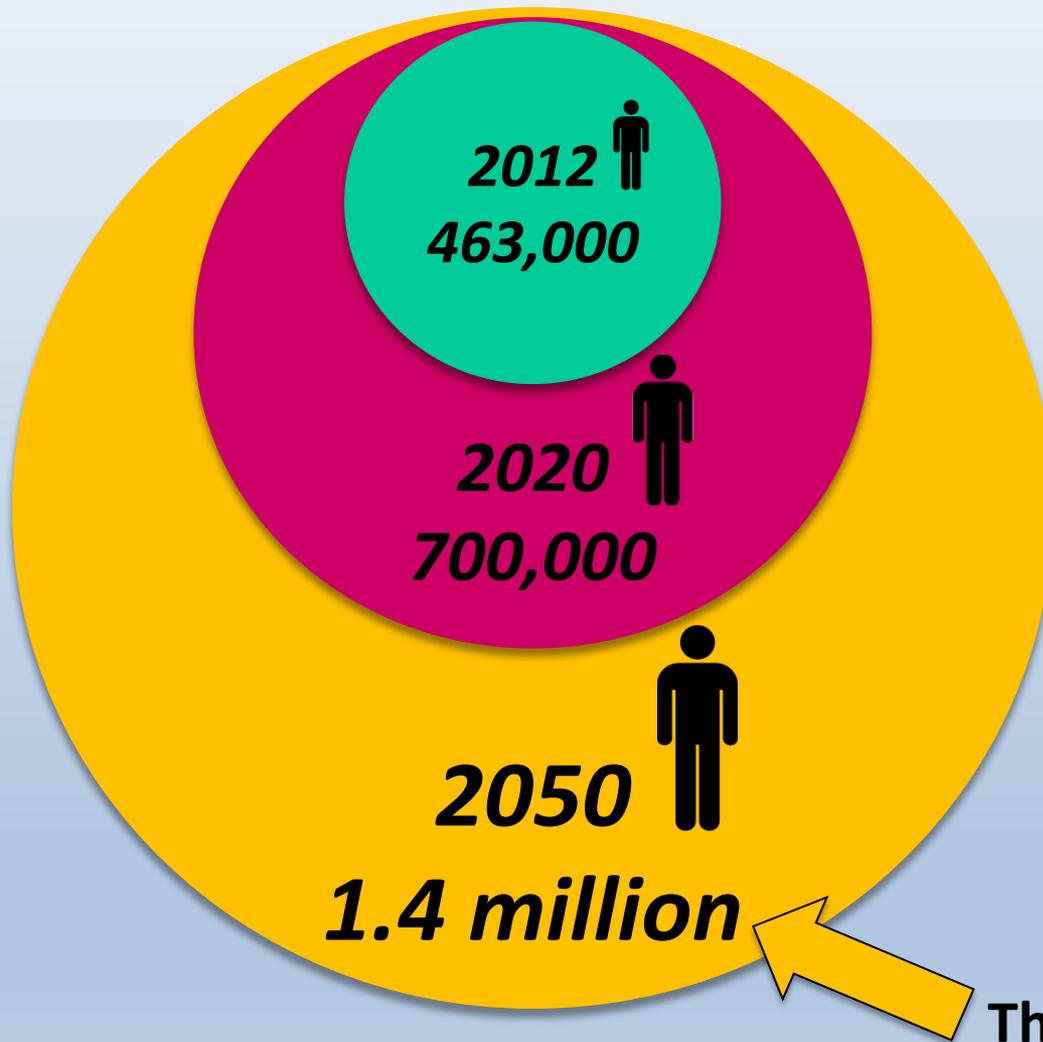
Engaging Experienced Older Adults in the Greater Phoenix Economy

Prepared by:
Thunderbird Consulting Group
December 2014

Robert McCracken
Caroline Kenduywa
William Hanson
Vicky Chang
Justin Espinelli



Opportunity Statement for Adults 65+



This represents an **untapped opportunity**

To stimulate Greater Phoenix's **global economy**

And foster **knowledge transfer.**

This represents **\$19 billion** in personal income.

Adults 65+ are a Valuable Resource

12.2%

of total Maricopa pop.



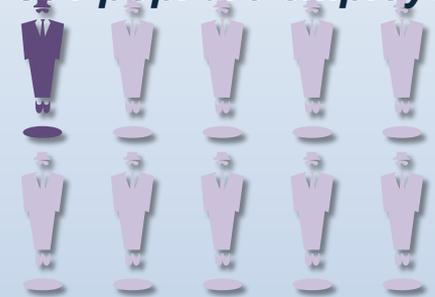
Mean annual household income of

\$48K



14.1%

Of 65+ pop. are employed



26.5%

have attained a

Bachelor's Degree or Higher



39% work in



Healthcare

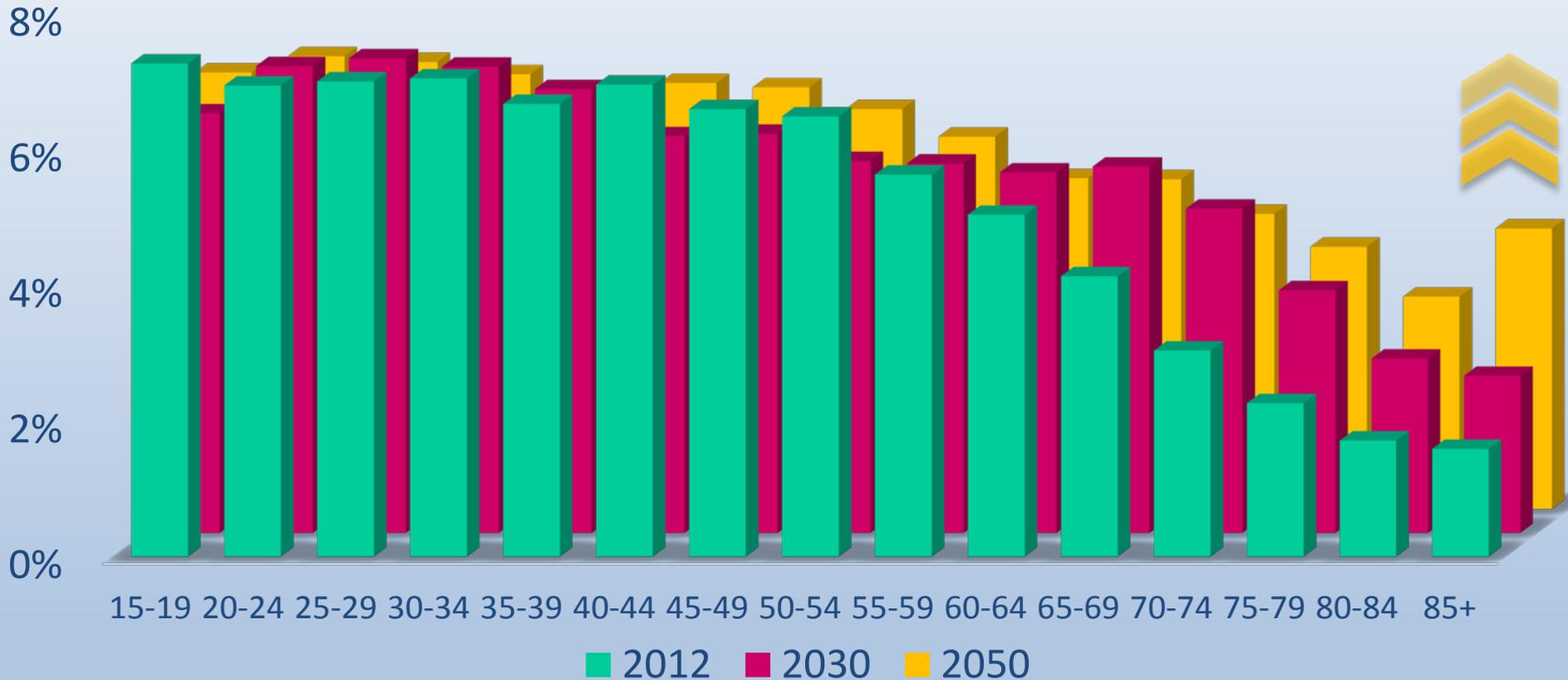


Education



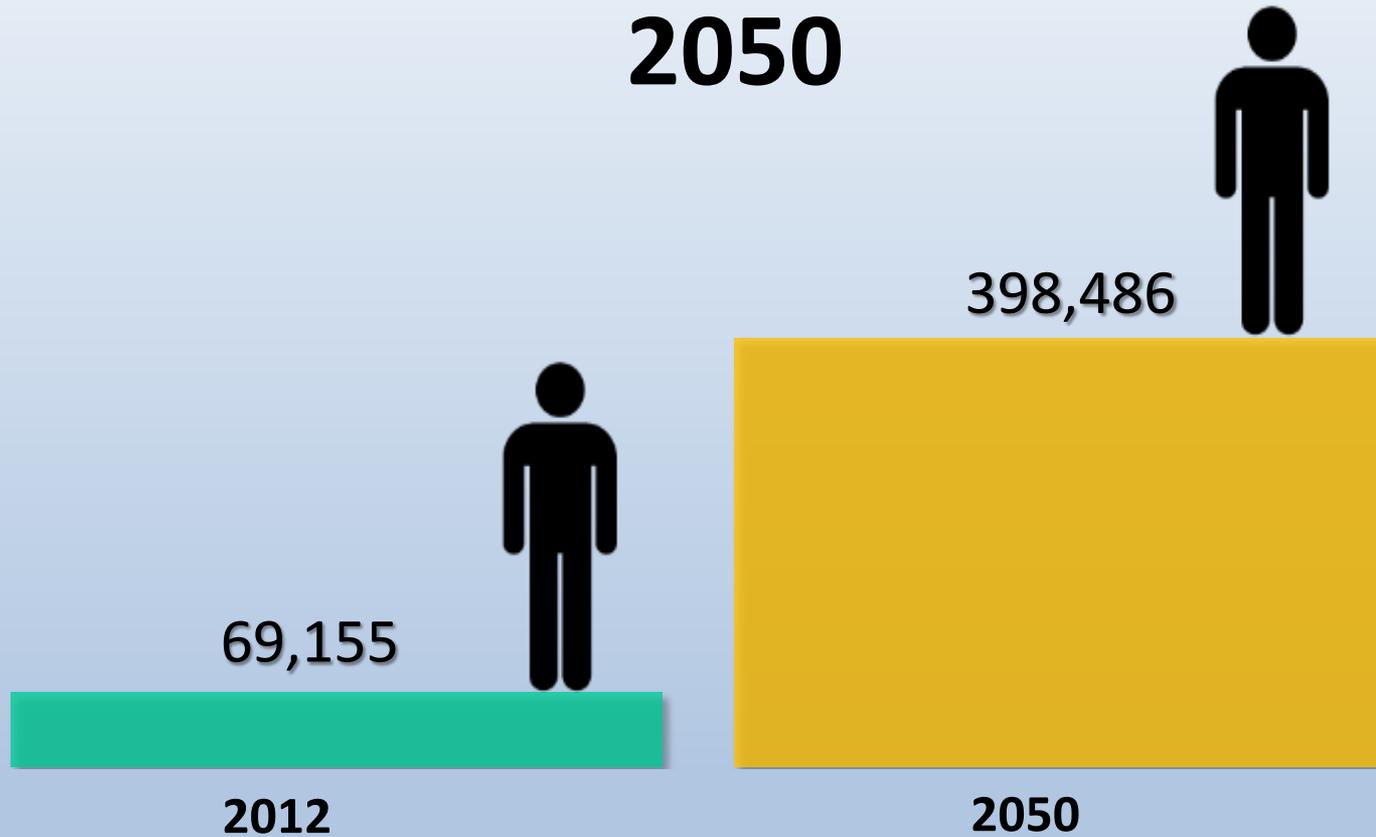
Retail

Greater Phoenix will Experience 204% Growth in Adults 65+ by 2050



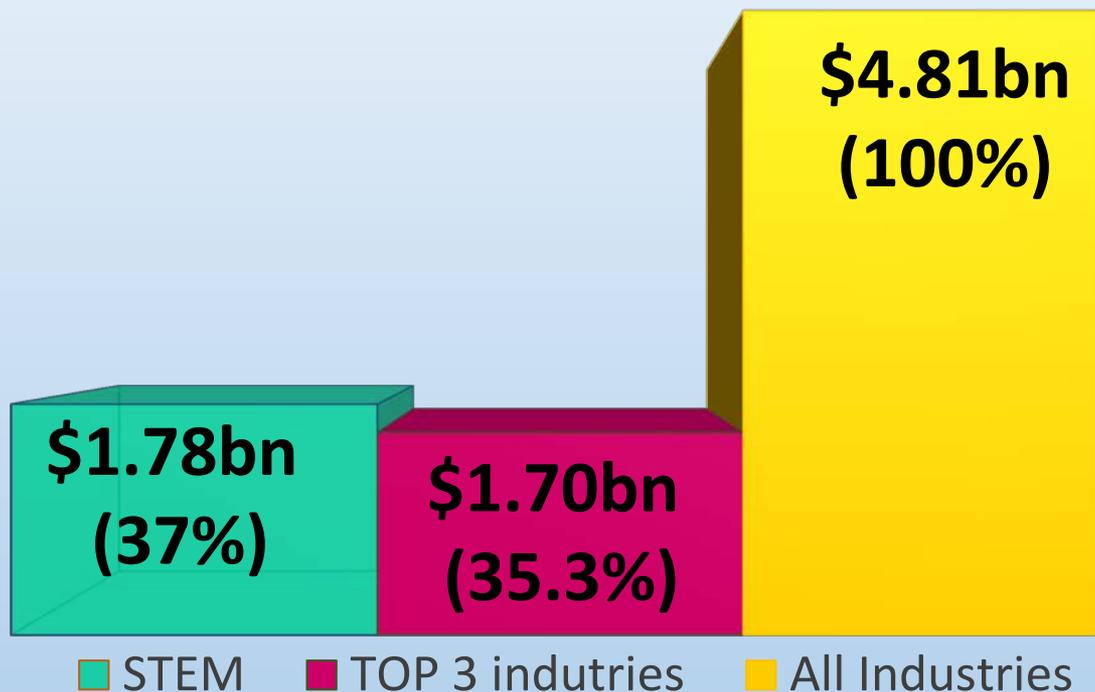
A growing 65+ population means a growing workforce.

Greater Phoenix will Experience 476% Growth in Workforce of Adults 65+ by 2050



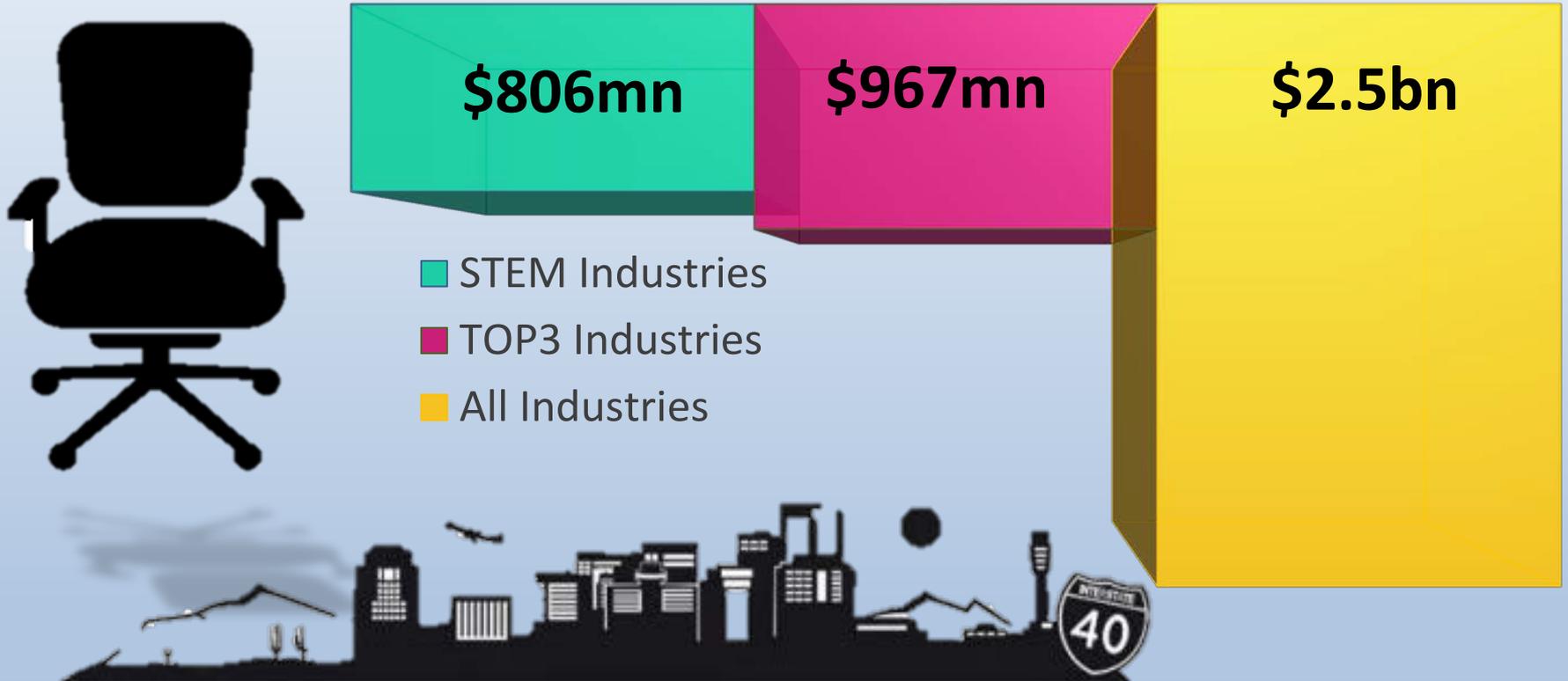
**398,486 older adult professionals working in 2050 =
\$19.1 billion in personal revenue.**

Economic Contribution of Adults 65+ Workforce



Employed adults 65+ contributed \$4.81 billion to the Greater Phoenix economy.

Annual Cost of Vacancy of Adult 65+ Professionals



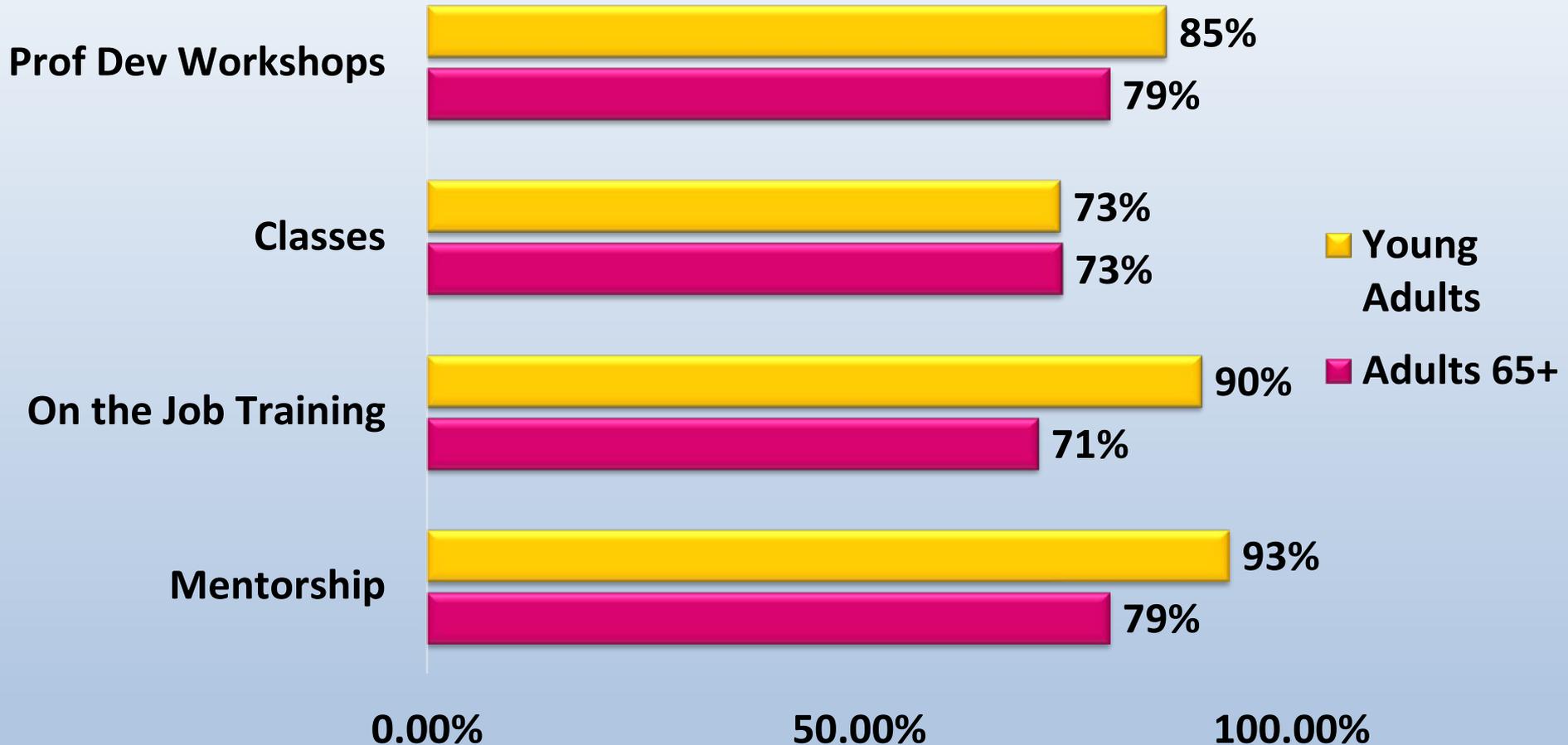
Annual cost of vacancy (adults 65+) had a negative economic impact on organizations in Greater Phoenix.

Measuring the Economic Impact of Engaged Older Adults



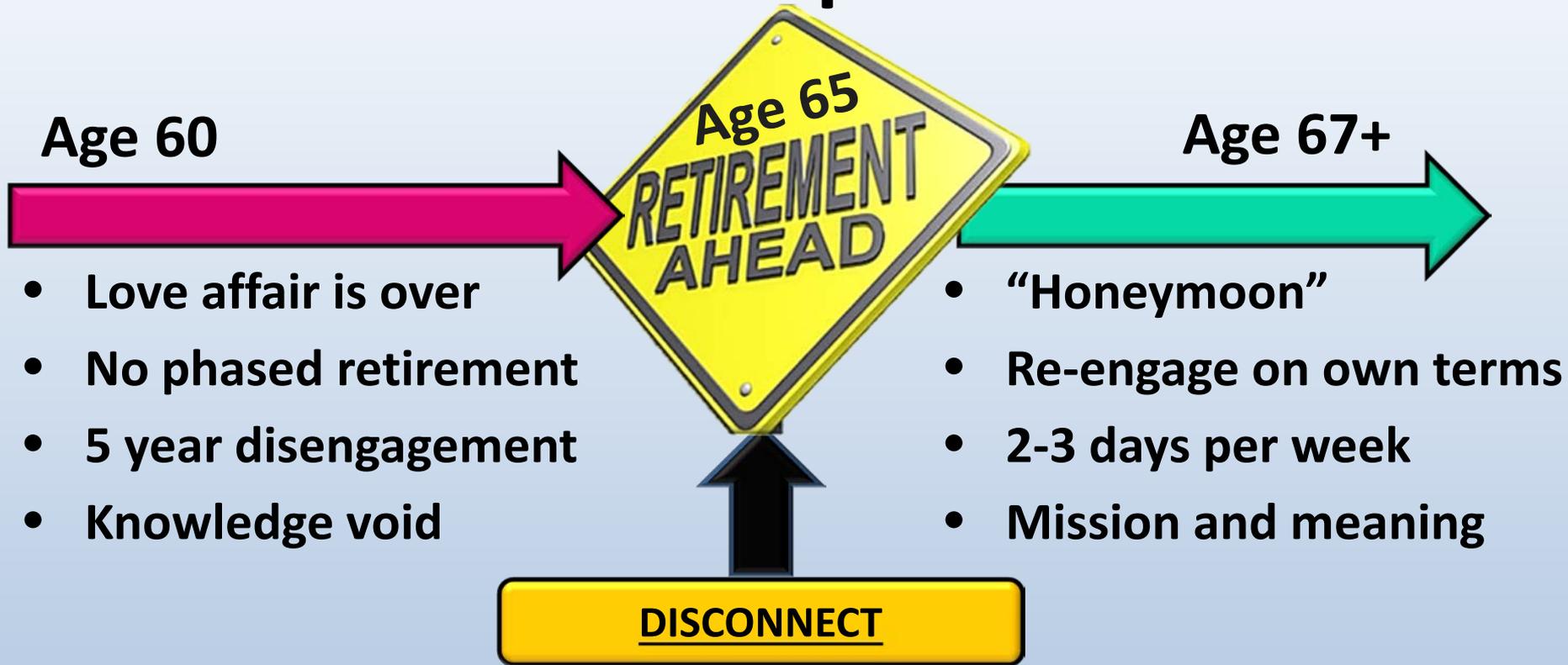
Engaging older adults in the workforce creates an economic impact value worth \$30,843 per match.

Survey Results Reveal a Desire to Engage



Both groups want to facilitate knowledge transfer via classes, workshops, training, and mentorships.

Focus Group Results



**Older adults want to re-engage on their own terms
but have challenges**

RECOMMENDATIONS: PRIVATE SECTOR

Action Steps:

- Workforce analysis
- Redefine retention
- Engage pre-retirees
- Develop leadership
- Create opportunities

Outcomes:

- Innovative positions
- Engaged workers
- Phased retirement
- Flexible benefits



Benefits:

Turnover ↓

Productivity ↑

Absenteeism ↓

Knowledge

Engagement

Retention ↑

Skillsets

Profit ↑

Barriers:

Taxes

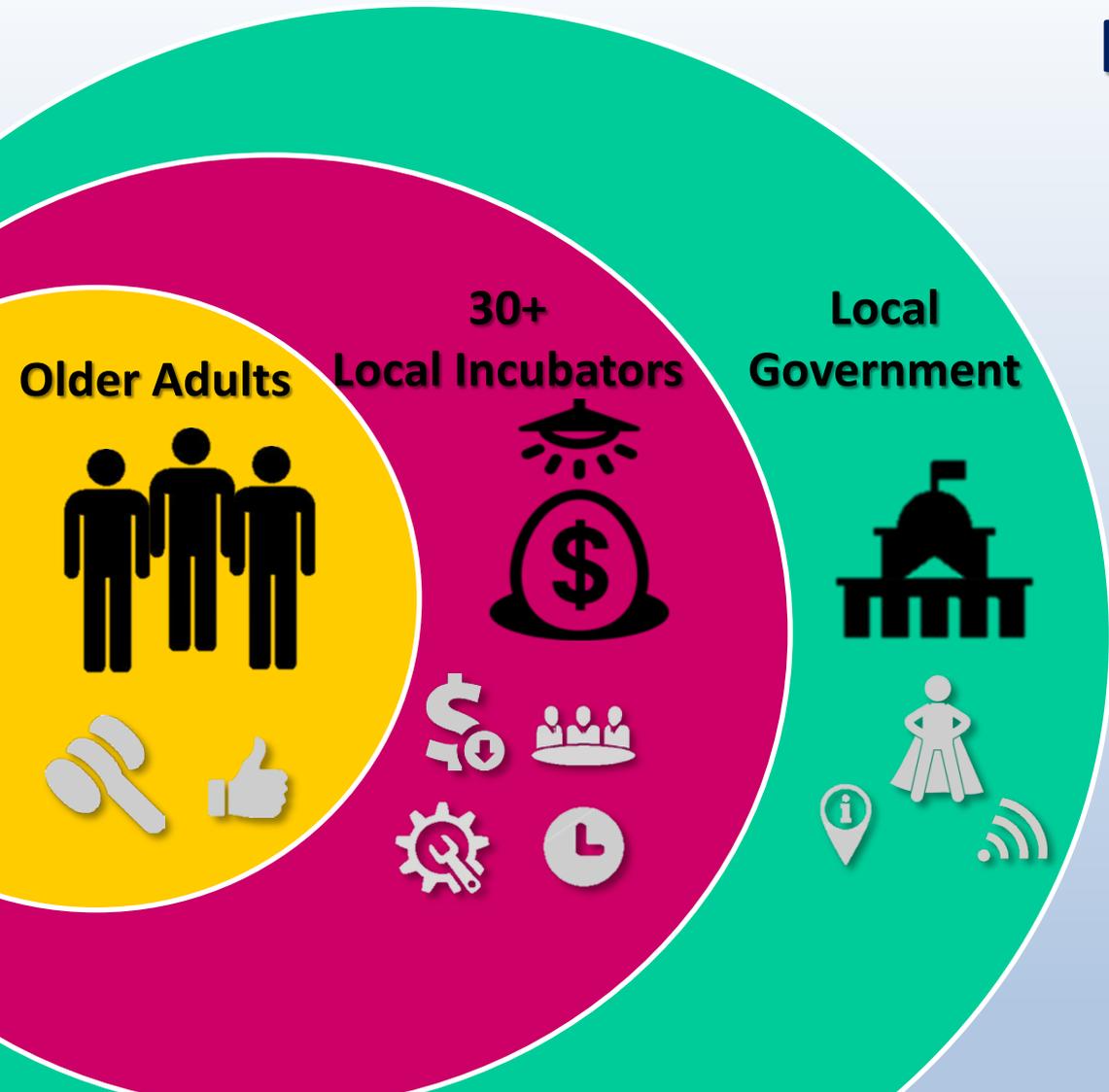
Regulation

Discrimination

Flexible older adult employment programs will maximize productivity and profit.



RECOMMENDATIONS: PUBLIC SECTOR



Benefits:

Sustainability

Opportunity

Knowledge transfer

STEM

Engagement

Goal Orientation

Entrepreneurship

Barriers:

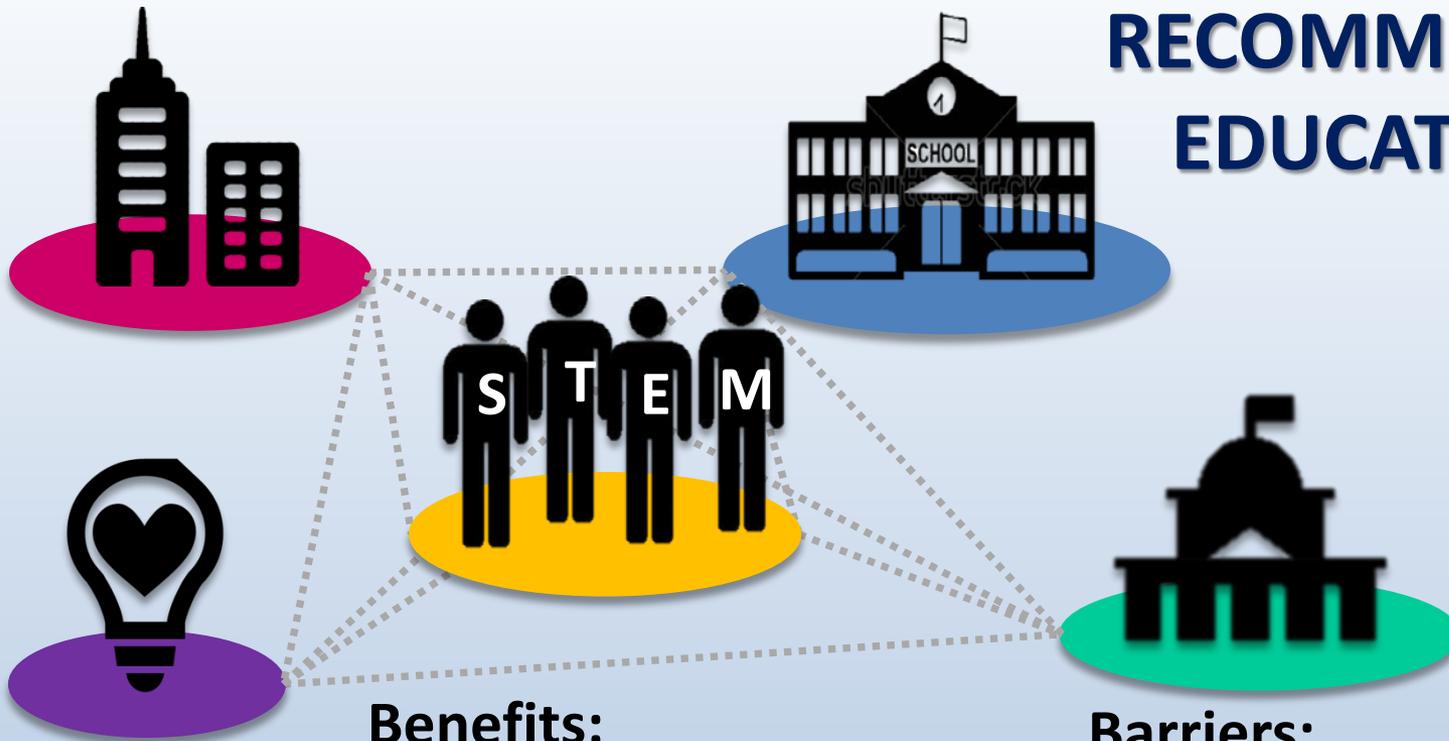
Organizing

Promoting

Funding

Greater Phoenix can drive entrepreneurial growth and knowledge transfer with a regional competition.

RECOMMENDATIONS: EDUCATION SECTOR



Benefits:

Sustainability

Network

Knowledge transfer

STEM

Engagement

Mentorship

Talent Match

Master Classes

Barriers:

Organizing

Promoting

Cost Management

A knowledge network will create educational and mentorship opportunities .

Next Steps on the Ladder



Private Sector:

- Encourage companies to conduct a workforce analysis
- Identify, prioritize and engage older adult professionals



Public Sector:

- Identify incubators to participate in a regional event
- Connect older adult professionals with incubator programs



Education Sector:

- Select organization to develop knowledge network
- Determine access to network

“The art of statesmanship is to foresee the inevitable and to expedite its occurrence .” Charles-Maurice de Talleyrand

Thank You. Questions?

Maricopa Association of Governments

Amy St. Peter, Human Services and Special Projects Manager

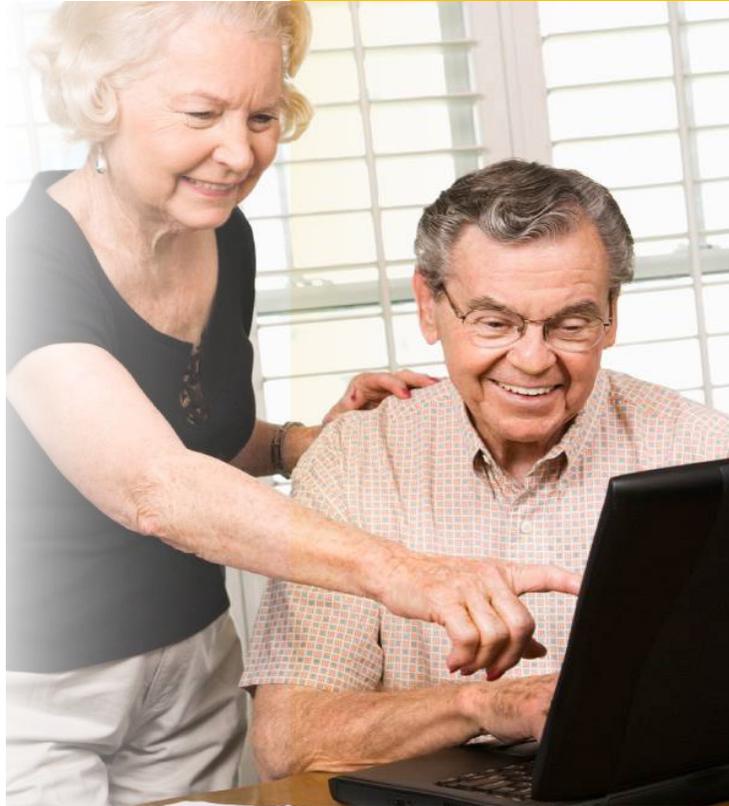
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2014

Engaging Experienced Older Adults in the Greater Phoenix Regional Economy



Presented to:
Maricopa Association of Governments
Economic Development Committee

Presented by:
Consultants from
THUNDERBIRD SCHOOL OF GLOBAL MANAGEMENT

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December 6, 2014



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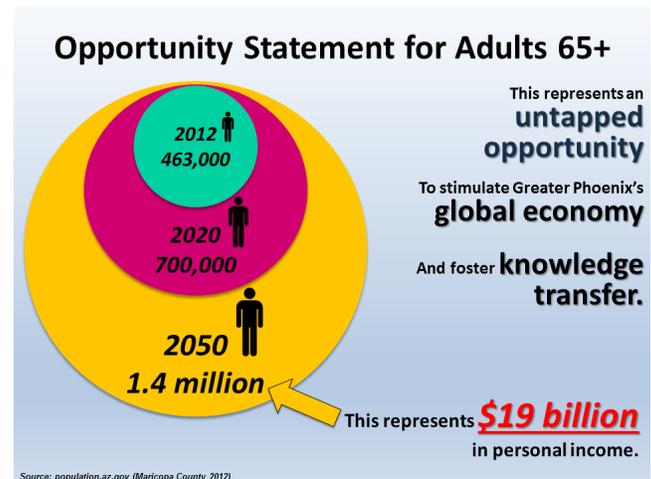


Overview

Older adult professionals aged 65+ are healthier, more active, working longer and are better educated than ever before. However, in 2011, the first of the Baby Boomers reached retirement age. As the largest generational cohort in the world, this will result in an economic impact both regionally and globally. Currently, every country is trying to understand the impact this will have on their economies, but very few are creating opportunities that maximize the potential value of this demographic. In Greater Phoenix, the older adult population is growing at an unprecedented level of 463,000 adults aged 65+ in 2012 to a projected 700,000 in 2020 and 1.4 million by 2050.

Two things are happening that are crucial to understanding what is at stake. The first is that as this generation leaves the workforce, there is an institutional knowledge drain that occurs. Organizations that lose employees lose years of knowledge that the employee gained on the job, and many organizations do not have programs designed to maximize the transfer of this knowledge to remaining employees. This can result in a knowledge gap that occurs within organizations. Second, not only are adults working longer, but national trends show that many adults are engaging in “encore” careers after their retirement. Many of these careers are centered around giving back to the communities or working on community projects that provide meaning to their lives. As the adult 65+ population continues to grow, there will be an increased need for programs that can facilitate connections between older adults and organizations in need of experienced talent. However, many of these adults are having difficulty finding the right programs or organizations. As a result, communities are not maximizing the valuable resource of knowledge and skill sets that these adults can provide.

Greater Phoenix is faced with several challenges and opportunities. The scope of this project has three objectives. The first is to determine whether older adults want to connect back into the workforce and whether they want to engage in



knowledge transfer with young professionals. The second is to identify programs that adults aged 65+ want to engage in that will have an economic impact on the community. The third is how to reduce the loss of institutional knowledge within the community as a result of adults aged 65+ leaving the workforce. This project



Photo source:
Virginia G. Piper
Charitable Trust

will discuss some of the current population trends, what they mean to Greater Phoenix, how older adults want to reengage and transfer knowledge within their communities, and what types of programs can be developed that will create a regional economic impact. As an engaged and proactive community, Greater Phoenix has an opportunity to adapt to the current population trends, to create programs that reengage older adults back into the community in positions in which that they want to engage, and to create pro-

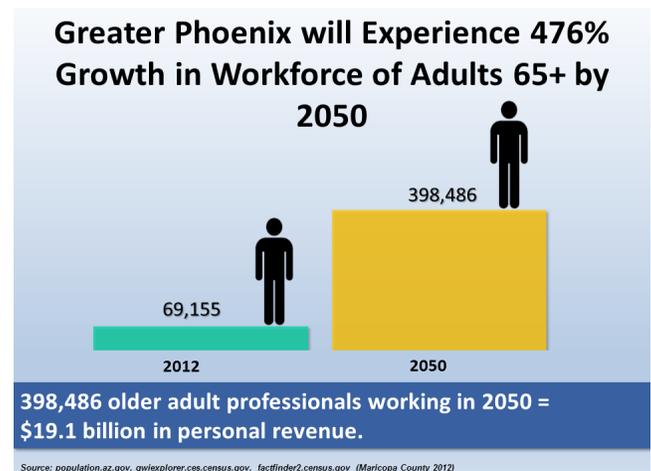
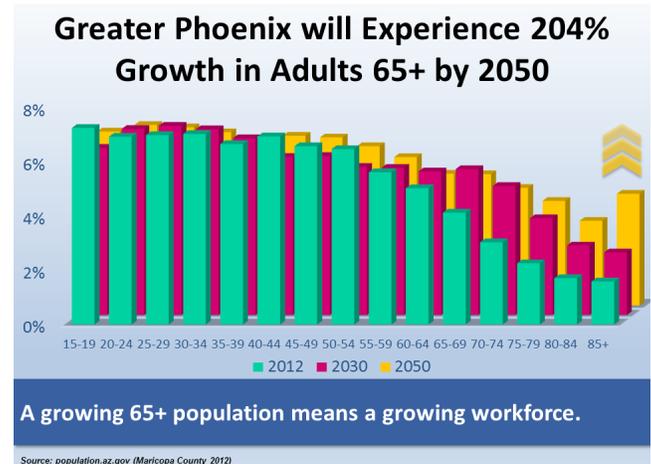
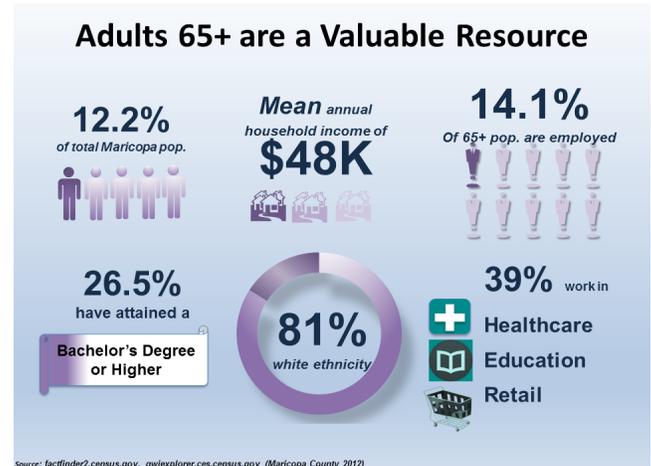
grams that will enable intergenerational knowledge transfer to occur so as to minimize institutional knowledge loss. These programs are divided into three sectors: private, public, and education sectors.

Demographic Profile and Trends

The demographic for this project was Adults 65+ residing in Maricopa County. Using 2012 data, this age cohort accounts for 12.2 percent of the total Maricopa County population. They are primarily of white ethnicity (81 percent), and 14.1 percent of this group are employed, earning a mean household income of \$48K per year. More than 26 percent have attained a bachelor's degree or higher and 39 percent work in health-care, education and retail industries. This means that older adult professionals are a very valuable resource for Greater Phoenix despite the national perception that older adults contribute minimally to their communities.

The 65+ age cohort is expected to grow to 1.4 million by 2050.

As the world continues to "gray", national and local participation rates of 65+ are also projected to increase. Records from the Bureau of Labor Statistics show that participation rates are on the rise annually nationally and locally, and that by 2050, an increased number of adults 65+ will remain engaged in the workforce. In 2012, there were 69,155 adults 65+ in the workforce, and by 2050 the region will experience a projected 476 percent growth in workforce participation to an unprecedented 398,486. Using 2012 mean household income levels for adults 65+, this translates to \$19.1 billion in personal revenue.

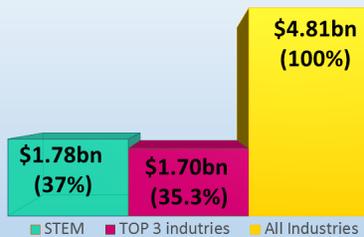


Economic Impact

In 2012, the older adult workforce aged 65+ contributed \$4.81 billion in personal income to the economy in Greater Phoenix. Science, technology, engineering and math (STEM) workers accounted for more than 30 percent of the total economic

contribution (from working adults 65+) to Greater Phoenix. While increasing numbers of this experienced workforce will remain employed, a survey conducted by the Bureau of Labor Statistics indicates 49 percent of the older adult workforce is planning to retire in a few years.

Economic Contribution of Adults 65+ Workforce



Employed adults 65+ contributed \$4.81 billion to the Greater Phoenix economy.

Source: bea.gov, qwiexplorer.ces.census.gov (Maricopa County 2012)

Annual Cost of Vacancy of Adult 65+ Professionals



Annual cost of vacancy (adults 65+) had a negative economic impact on organizations in Greater Phoenix.

Source: volt.com, bls.gov, qwiexplorer.ces.census.gov (Maricopa County 2012)

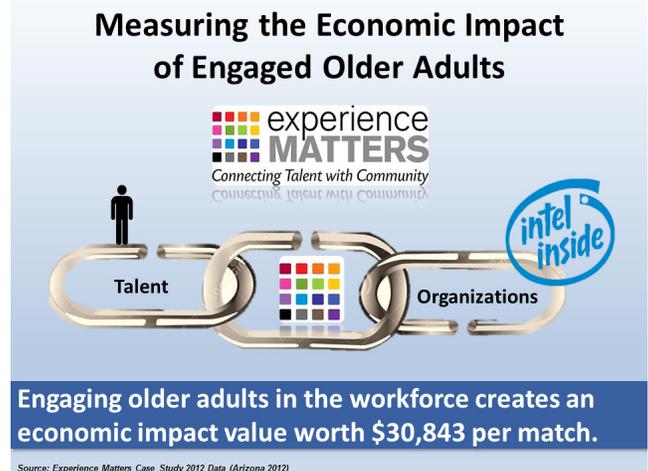
Their exodus leads to the cost of vacancy. Cost of vacancy is the loss of revenue incurred by revenue generating organizations due to vacant positions. Cost of vacancy for public organizations is the dollar amount associated with the reduction in productivity due to vacant positions. The Thunderbird Consulting Group analyzed Bureau of Labor Statistics and Quarterly Workforce Indicators Data to calculate three annual cost of vacancy (CoV) metrics for 65+ older adult professionals in Greater Phoenix:

- STEM industries CoV = \$806 million
- Top three industries (Retail, Healthcare, Professionals) CoV = \$967 million
- All Industries CoV = \$2.5 billion

The key insight is that this \$2.5 billion represents the annual revenue lost in 2012 for Greater Phoenix because older adult professionals left the workforce. The team calculated the annual cost of vacancy by taking the Simple Salary Multiplier (which states that on average an employee generates a value three times their salary) multiplied by the median annual salary for a senior management position (this figure varies by industry) multiplied by the total number of retiring older adults professionals.

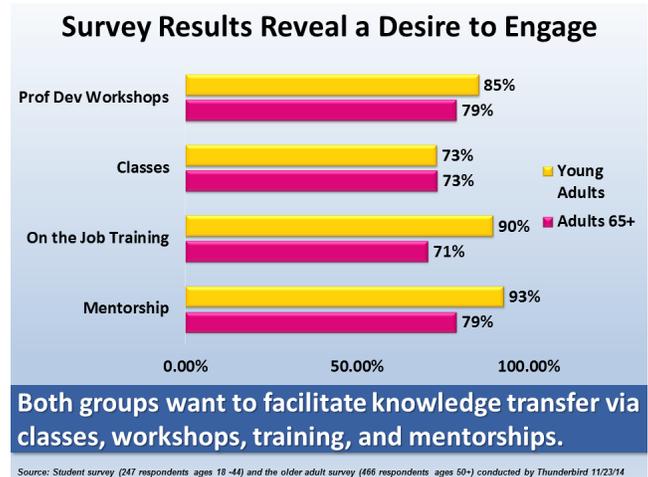
Experience Matters Case Study

Experience Matters is a nonprofit organization that connects experienced older adult talent with social purpose organizations. This helps mitigate cost of vacancy for participating organizations. Experience Matters identifies and connects talent to organizations by partnering with companies such as Intel to help connect retirees to nonprofit organizations so these talented workers can continually add value to their communities. On average, Experience Matters helps create an annual economic human capital value worth more than \$30,000 per annual match.

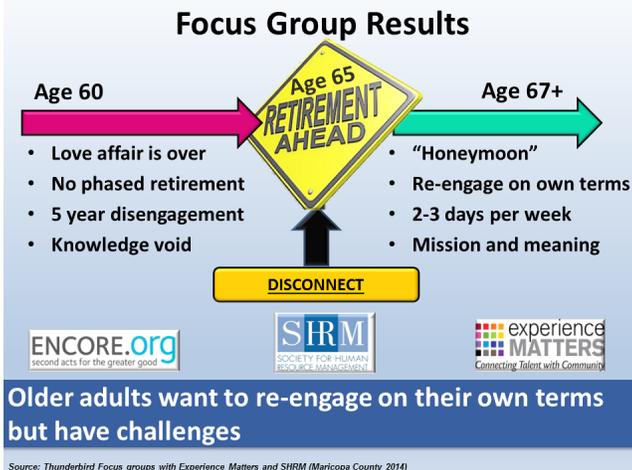


Primary Data

The team conducted two parallel surveys (247 young adult responses and 382 older adult responses) to understand whether there is a mutual desire for young adult professionals to engage with older adult professionals. The team also wanted to know how different generations wanted to engage with each other. Overwhelmingly, both older and younger adult professionals wanted to engage with each other, mainly through mentoring, on the job training, classes, and professional development workshops. This means that the region needs to create programs that leverage these mechanisms to facilitate intergenerational knowledge transfer.



The team also conducted two focus groups through Experience Matters (older adults who had retired and then engaged in encore careers) and the Society



for Human Resource Management (HR managers in charge of recruitment) and a focus group at the national Encore.org conference. The focus groups revealed that during the last five years prior to retirement, older adults start to disconnect from their jobs. They have been there, often for more than 20 years, and have lost interest. Most do look forward to the opportunity to retire, relax, and to spend time with family and friends. Typically, after between six months to two years of retirement, they become dissatisfied with a sedentary lifestyle and experience a form of identity crisis. They look for a sense of meaning and want to share their knowledge and give back to their community. They want to reengage into the workforce, but on their own terms.

The focus groups also revealed that older adults on the verge of retirement prefer a phased retirement that allows them to spend more time mentoring young professionals. Most mid-size companies don't have a system in place to accommodate phased retirement that allows for knowledge transfer prior to retirement. Companies have difficulty reaching older experienced professional adults who want to reengage in the workforce due to the differences in how companies recruit for talent and how older adults seek opportunities.

Recommendations

Private Sector Recommendation

Private sector organizations can benefit from the following opportunities:

1. *Conduct strategic older adult workforce assessments.*
2. *Redefine retention.*
3. *Identify & Prioritize older adult professionals.*
4. *Foster leadership development.*
5. *Create knowledge transfer opportunities.*

Flexible employment opportunities for older adult professionals will maximize productivity and profit by reducing turnover and absenteeism and increasing retention. Many reputable companies have developed successful older adult engagement programs. For example, Chevron's Bridges Program enables former technical and professional employees to stay connected via a community website. Applicants are considered for specific contract assignments such as advisors, recruiters and technical specialists. According to a SHRM-AARP survey conducted in 2012, 29 percent of organizations have conducted an older adult workforce assessment, an assessment that analyzes the impact of older adult professionals leaving their organizations.

No single program works for all organizations. The key insight is that organizations can benefit from conducting an older adult professional strategic workforce assessment. Organizations can develop engagement programs that address their own specific organizational needs and adopt a proactive paradigm shift toward "retiring retirement." Organizations and employees alike would benefit from eliminating traditional retirement as the exclusive option. This will empower organizations to retain, transfer and leverage subject matter expertise and specialized skill sets for future growth.

**RECOMMENDATIONS:
PRIVATE SECTOR**

Action Steps:

- Workforce analysis
- Redefine retention
- Engage pre-retirees
- Develop leadership
- Create opportunities

Outcomes:

- Innovative positions
- Engaged workers
- Phased retirement
- Flexible benefits

Benefits:

Turnover ↓	Productivity ↑
Absenteeism ↓	Knowledge
Engagement	Retention ↑
Skillsets	Profit ↑

Barriers:

Taxes	Regulation
Discrimination	

Flexible older adult employment programs will maximize productivity and profit.

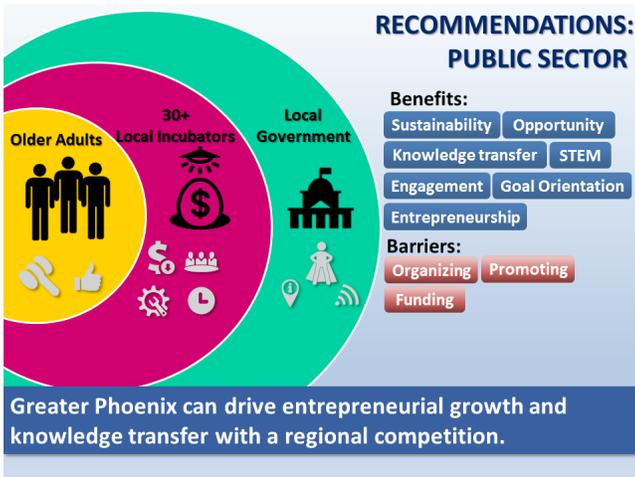
Source: HBR.org (2004, 2012, 2014), Kenan-Flagler.unc.edu (2011)

The next steps that should be taken are to help companies understand cost of vacancy, to encourage companies to recognize the value created by older adult professionals by conducting a strategic workforce assessment; and to encourage companies to identify and prioritize high value older adult employees and to start engaging them to maximize their value and knowledge transfer.

Public Sector Recommendation

For the public sector, there are more than 30 incubators and accelerators spread throughout the Greater Phoenix area. These are organizations that allow entrepreneurs

space and funding in order to build, develop, and scale their companies. The team recommends that the region leverage the strengths of these incubators in order to connect them with older adults who want to reengage in the workforce.



The entrepreneurial ecosystem is a fragmented landscape that would benefit from increased cooperation communication, and regional collaboration.. The team envisions the public sector championing an event or an existing incubator competition that connects incubators to an experienced older adult talent pool that

wants to engage with local entrepreneurs. Organizations like Venture Madness or SEED SPOT's Demo Day are successful examples of events that showcase entrepreneurs. SEED SPOT's last Demo Day event drew more than 950 attendees. The Thunderbird older adult engagement survey identified 88 older adult professionals who indicated they had a strong or very strong desire to reengage in the workforce by advising a start-up. These are the people who might show a strong interest in connecting to this type of event. If an organization can connect these 88 individuals to start-ups, the region could generate an estimated \$2.7 million in value (assuming an economic impact match value equivalent to Experience Matters).

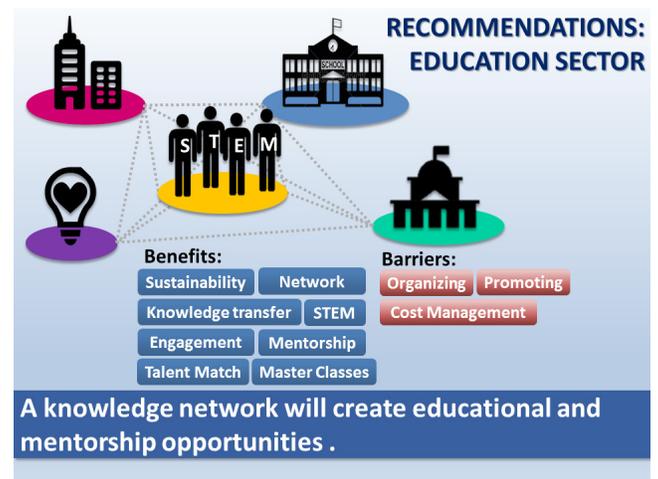
For value to be created, individuals need to bring skills to organizations, and organizations need to provide mission and purpose. Older adult professionals and start-ups can benefit each other. Start-ups need smart, experienced, available, and

lower cost talent. Older adults can fill critical skill gaps that start-ups could otherwise not afford to hire.

The next steps for organizing this program would be to first, analyze the entrepreneurial ecosystem; second, to identify key incubators and accelerators that want to be part of a bigger entrepreneurial movement and; third, to connect older adult talent to these organizations. Organizations such as Experience Matters and Encore.org have ample experience in connecting older adults to causes and work opportunities (primarily with nonprofit organizations) and could be leveraged to assist with facilitating the connection between older adult professionals and entrepreneurs or incubators.

Education Sector Recommendation

For education, it would be beneficial for the region to develop a knowledge network program that connects older adult professionals who want to engage with entities such as the public sector, private sector companies, nonprofit organizations and schools that want to draw from this talent pool on a contract basis. The Thunderbird surveys identified that both older adults and younger professionals want to connect through mentorships and classes, and a knowledge network would facilitate this. By creating a regional portal that attracts and allows adults to connect with service providers who need their experience, Greater Phoenix will serve both the needs of adults 65+ and the needs of the region. This program addresses both the sharing of knowledge between generations, and the reengagement of older adults into activities that they want to be involved with on their own terms.



There are programs in existence that currently offer similar services, such as Greater Phoenix Score (www.greaterphoenix.score.org) that conducts mentoring for businesses and creates an economic impact on the community. However, while this program is successful, its focus is primarily on the business mentor-

ing side rather than the knowledge side of the equation, and they do not target adults 65+. The creation of a knowledge network would match talent with need by creating opportunities for mentorships, master classes (particularly in STEM industries), and consulting engagements between older adults and organizations, government entities and educational institutions.

The first step for creating a knowledge network is to identify an organization that can become the conduit for connecting talent to organizations. The second step is to determine how and to what degree people and organizations will be able to access this network and whether this would be a free or paid service.

Conclusion

This project has addressed in detail the growing adult 65+ population and the economic impact that it will have in Greater Phoenix through 2050. As this population increases, there will be an increased need for strategies that address inter-generational knowledge transfer, and programs that allow adults to reengage on their own terms and to easily connect with “encore” careers. By recognizing and accepting the new population landscape, and embracing the opportunity that older adult professionals have to offer our communities, Greater Phoenix will also help change the erroneous national perception that regards older adults solely as frail and in need of services and assistance. The new paradigm can focus on the significant skills and talents of older adults as positively impacting the economic engine of a community. By developing scalable programs in the private sector, public sector, and education, Greater Phoenix can set itself apart, drive positive change, and show other communities how to maximize the economic impact that adults 65+ can provide to their communities.

Next Steps on the Ladder



Private Sector:

- Encourage companies to conduct a workforce analysis
- Identify, prioritize and engage older adult professionals



Public Sector:

- Identify incubators to participate in a regional event
- Connect older adult professionals with incubator programs



Education Sector:

- Select organization to develop knowledge network
- Determine access to network

“The art of statesmanship is to foresee the inevitable and to expedite its occurrence.” Charles-Maurice de Talleyrand

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Draft
Major Regional Goals/Work Emphasis Areas/Results
for Fiscal Year 2015 - 2016

Human Services/Environmental Justice:

F-1. Improve Coordination of Mobility Options for Transportation Disadvantaged People

Update the MAG Human Services Coordination Transportation Plan to reflect emerging needs and new opportunities to benefit older adults, people with disabilities, and people with low incomes. The plan will offer an inventory of available services, an assessment of the gaps and resources, and prioritized strategies to best meet these needs. The plan will be presented to the MAG Regional Council for approval in the third quarter of FY 2016.

F-2. Ensure Equitable Treatment of Disadvantaged Populations

Monitor implementation of the Environmental Justice Title VI Plan and make refinements indicated by public feedback and committee recommendation as needed. Continue to reach out to communities of concern through public involvement activities and integrate feedback from communities of concern into the planning process as appropriate. Achievement of these activities will be demonstrated by the fourth quarter of FY 2016 through a report to related MAG Committees.

F-3. Promote and Support Age-Friendly Communities

Support and expand the Arizona Age-Friendly Network by successfully maintaining the three age-friendly initiative pilot projects that launched in FY 2014 through Central Village in Phoenix, Tempe Neighbors Helping Neighbors, and Northwest Valley Connect; implement the new age-friendly pilot projects developed in Scottsdale, Surprise, Wickenburg, the City of Maricopa, Bullhead City, and Quartzsite; solicit additional funding to continue the network; and increase traffic on the project's website by 10 percent.

Maricopa Association of Governments (MAG)
Arizona Age-Friendly Network and the MAG Transportation Ambassador Program Present:

Going. Places.

Going- Moving with mobility innovations

Places- Communities that connect generations

Going places- What progress are we making and what's next

Purpose of event:

- To introduce disruptive activities that will create more positive connections among the generations and invite people to reconsider how people age.
- To raise awareness and support for the Arizona Age-Friendly Network and other related efforts.

Outcome:

- More communities will adopt more age-friendly elements, resulting in people of all ages having more choices to be meaningfully engaged with their communities.
- The Network and similar efforts will be supported by a range of stakeholders.

Special Features:

- Curated art show
- Best Age-Friendly Community awards (one winner and one runner up, honorable mentions)

Attendance: 200 people +

Primary Audience:

- Local governments
- Nonprofit agencies
- Transportation entities

Secondary Audience:

- Faith-based entities
- Civic groups
- Residents

Date and Time:

- Tuesday, Wednesday or Thursday
- Last week of April or first week of May
- 7:30 a.m. to set up, pack and leave by 5:00 p.m.
- Access to store items the day before

(Possible) Venue: Need one plenary room for 200+ people and three to four break out rooms

- Desert Willow Conference Center / Phx/Tempe
/ http://www.desertwillowconferencecenter.com/meetings/meeting_services
- Thunderbird Executive Inn & Conference Center / Glendale
/ <http://www.thunderbirdexecutiveinn.com/meetings-en.html>

- Scottsdale Resort & Conference Center / Scottsdale
/ http://www.thescottsdaleresort.com/conferences/events_meeting_rfp/
- Phoenix Convention Center (and Executive Conference Center) / Phx
/ <http://www.phoenixconventioncenter.com/venues/phoenix-convention-center/>
- ASU Mercado Conference Center / Phx
/ <http://www.asu.edu/xed/asudt/roomrental.html>
- ASU SkySong Center / Scottsdale /
<https://skysong.asu.edu/space/meeting-event>

Sponsors:

- Pfizer Foundation
- Grantmakers in Aging
- Virginia G. Piper Charitable Trust