

EngAGEMENT Initiative's Research Results:

Aging in Arizona: A Summary of Grantmaker Perspectives

Research conducted by:

Carolyn A. Holmes, MScN, PhD

Holmes Research & Consulting, LLC

Phoenix, Arizona

On behalf of the:

Arizona Grantmakers Forum

Phoenix, Arizona

December 20, 2012

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

In January 2011, AGF launched a two-year EngAGEMENT Initiative to build grantmaker interest around aging issues and ultimately, to increase funders’ investments in this area.

The Initiative focused on three topical 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.

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.

EngAGEment Sponsors:

The Engagement Initiative is supported by a grant from Grantmakers in Aging with matching funds provided by local partners:

- Arizona Community Foundation**
- BHHS Legacy Foundation**
- St. Luke's Health Initiatives**
- Virginia G. Piper Charitable Trust**

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.

Arizona Grantmakers Forum

OUR MISSION: To increase, enhance and improve philanthropy in Arizona.

OUR VISION: Arizona's expanding philanthropic community, working collaboratively, invests their resources wisely to make a profound positive difference for Arizona's communities.

OUR LEADER:

**Marissa Theisen, President & CEO
2201 E. Camelback Road, Suite 405B
Phoenix, AZ 85016 (602) 977-2756**