A Learning Laboratory for Bringing Generations Together

The Communities for All Ages Initiative of the Arizona Community Foundation

December, 2008

Welcome to This Story…

This is the story to date of the Communities for All Ages (CFAA) initiative of the Arizona Community Foundation. The initiative is a framework for community building that focuses on improving the quality of life for entire communities, not just specific age groups, and transforming varied generations from competitors to allies. The long-term goal for the CFAA initiative is to build the capacity of communities to address critical issues from a multi-generational, cross-sector perspective and improve the quality of life for all ages. This work:

- *Intentionally promotes the well-being of children, youth, older adults and families.*
- *Makes full use of the assets of people at every stage of life.*
- *Fosters interdependence and interaction across generations.*
- *Embodies and promotes the values of reciprocity, individual worth, diversity, inclusion, equity and social connectedness.*

The Arizona Communities for All Ages initiative was launched in 2003, focusing on the challenges and opportunities facing the younger and older populations in our fast-growing state, and ultimately helping all ages. We have taken the lessons learned from this first exploratory experience and issued a second set of RFPs that will take us through the next five years. We invite you to learn about our work, and we encourage you to consider the powerful impact of bringing the generations together in your community.

Jacky Alling, Vice President, Programs
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This case example describes significant innovations underway across Arizona that demonstrate the greater returns possible when foundation investments simultaneously benefit multiple age groups. These investments respond to the limits on our financial and even environmental resources, but expand the limits of our imagination about strategic resource allocation.

The investments in these Arizona communities are likely to have real payoff and staying power, because:

- *residents, organizations, and officials are intentionally working together rather than competitively to address concerns across the generations*
- *financial, human, and natural resources are being used wisely by focusing on "economies of scope" — single investments with multiple returns*
- *the needs of current generations are getting addressed across the lifespan without overburdening future generations.*

This case example is a companion piece to the Viable Futures Toolkit (www.viablefuturestoolkit.org), a practical set of ideas, strategies, and guidelines for creating community well-being with limited resources. We invite you to visit the website regularly for updates about emerging practices across a range of challenges facing our communities and to access other case examples in this series. JustPartners, Inc., is responsible for the development and production of the Viable Futures Toolkit and the accompanying case examples.

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At the Arizona Community Foundation, Jacky Alling, Vice President, Programs led the initiative in the state and is responsible for the content of this report.

Temple University's Center for Intergenerational Learning in Philadelphia and its founder, Nancy Henkin, served as a primary catalyst for ACF to take on this initiative. In addition to her contributions as a consultant to the project, she is a major thought partner and architect of the Communities for All Ages framework and model.

Also contributing to the Arizona Communities for All Ages initiative were the Annie E. Casey Foundation; John Oyler of the Institute for Cultural Affairs in Phoenix; Donna Butts of Generations United in Washington, D.C.; and Nagle & Associates, which served as an evaluator and whose work provided a significant base for the content of this case study. Sandy Doubleday of SD&N Communications worked as the consultant on the case study. Thanks also to former ACF staff, Bruce Astrein and Suzanne Quigley, for their vision and groundbreaking efforts on this work.

A very special thanks to ACF donors and board members who agreed that "good communities to grow up in are good communities to grow old in," and who supported this concept with specific contributions.

Table of Contents

A Changing Landscape for Community Foundations 1

Welcome to Arizona: Home of the Arizona Community Foundation. . . 2

Investing in Communities for All Ages 5

Value for the Foundation and the State 11

Lessons Learned from this Investment Approach 12

Stay Tuned. 16

Can This Approach Work for You? 17

Appendix. 20

Appendix A. AZ Communities for All Ages Request for Proposal 20

Appendix B. AZ Communities for All Ages Community Profile Guidelines. 25

Appendix C. Initiative Timeline. 27

A Changing Landscape for Community Foundations

By considering the needs of more than one age group and understanding generations' shared concerns, contributions and grants can be leveraged to serve more members of a community better.

Community foundations are unique organizations representing broad interests, with strong ties to defined geographic areas. Foundation staff work every day with other nonprofits and have a deep understanding of both the big picture and the specific issues that are prevalent in the areas they serve. They are known for bringing partners together around a common goal and for working to develop a common civic agenda to address future opportunities and needs.

In today's climate of financial instability, community foundations find themselves needing to work smarter, with a stronger case, to attract donor support that sustains established programs and creates new ones. Pooling money from different field of interest funds can be more cost-effective for investments and avoid putting the needs of one group above another. Perhaps now more than ever, donors and other nonprofits look to community foundations for research, experience and community intelligence to guide their interests and attention. These factors all led the Arizona Community Foundation (ACF) to launch the Communities for All Ages (CFAA) initiative in our state.

CFAA is changing the way people in Arizona and across the nation think about addressing community issues and enhancing the lives of all generations. Before the Arizona Community Foundation began this innovative initiative in 2003, most of its programs focused on the needs of Arizona's younger and older populations separately. These silos reflect programmatic arrangements in community foundations and many other organizations and agencies across the country. CFAA has became a laboratory for change, leading its stakeholders down a different path to meet the challenges and opportunities of younger and older populations together. And that has made all the difference.

Will this work lead to long-term, sustainable change? At ACF, we have every reason to believe that it will. A second five-year request for proposals has been issued to continue the work, and communities are responding. Clearly, the Arizona CFAA grantee organizations have been affected positively by these efforts, with the benefits enjoyed by their broader communities. ACF and its graduate CFAA sites are spearheading the development of a statewide network. Only time will tell. But we trust that these initial efforts will sustain an intergenerational focus as communities move into the future (without supplemental funding from ACF) to encourage actions in that direction. ACF wants to provide sufficient support and training to give these communities the confidence to proceed on their own and to provide this initiative its best chances for long-term success. We learned many lessons from our first RFP and are applying those to our continuing initiative. We're happy to share our story with you….

Welcome to Arizona: Home of the Arizona Community Foundation

People who live in Arizona enjoy a quality of life that is the envy of many. From sunny winter days to an amazingly diverse geography, the state is one of the nation's fastest growing regions, particularly the metro Phoenix area.

On the other hand, many of Arizona's communities battle crime, public disengagement, inadequate schools and teacher shortages, the need for quality childcare and after-school opportunities, low wages and the lack of affordable housing. Most recently, rising energy costs add to the challenges in a state where communities are often many miles apart. It is well documented that the state ranks near the bottom of most national standards, whether it is educational attainment, drop-out rates or enough quality childcare. Inequities exist in the distribution of assets and resources between urban and rural communities.

All Arizonans, young and old, will find an increasing need for healthcare and social services, educational opportunities, affordable and accessible transportation, and appropriate living options. Today's aging population of Baby Boomers is different, not content to sit back and let the world go by. They value remaining active and healthy and living independently as long as possible as part of their communities. Also, Arizona may see a shift in some demographics as older adults move to rural areas for more affordable housing options.

Of course, the aging population is a rapidly-growing demographic across America. According to U.S. Census Bureau projections, more than 12 percent of the population was over 65 in 2007. Senior adults 65 years and older are expected to grow from about 40 million in 2010 to almost 89 million people by 2050. At the same time, it is estimated children and youth 18 years and younger will grow from 75 million to a little more than 100 million in that time frame. This offers a great opportunity as well as a special challenge for social service providers in every community to create programs that reach needs across the ages.

Arizona statistics specifically make a strong case for ACF's support of intergenerational strategies. The latest figures place Arizona's population at about 6.5 million people and the second fastest growing state in the nation. In 2006, the first Baby Boomers celebrated their 60th birthdays, and state statistics project that one in four residents will have passed that age by 2020. U.S. Bureau of Census figures from 2005 indicate that the trend is expected to continue moving up. The number of Arizonans who are 60 years and over likely will triple from one million today to just under three million by 2050. At the same time, Arizona's fastest growing population is under 18 years of age.

A combination of emerging trends and institutional developments encouraged ACF to take up the Communities for All Ages initiative, including the following:

- **Fast growing older and younger populations** – Arizona statistics predict there will be as many older people in Arizona as there are children under the age of 17 by 2030, according to U.S. Census projections. Older Arizonans will be living longer, healthier lives and spending more time in retirement. Young people will need individualized attention, guidance and support from caring adults. Both need opportunities to contribute to their communities.

Selected Arizona demographics

Total population	6.3 million
% White non-Hispanic	59%
% Latino/Hispanic	30%
%American Indian	5%
% Black/African American	4%
% Asian	2%
% Living below poverty level, 2007	14%

- **Senior Enclaves** – Arizona was on the forefront of the development of senior-living enclaves where older adults live in separate, age-restricted communities with other older adults. These are increasingly dissatisfying to some senior residents, as well as to some of the cities where these enclaves are located.

- **Increased interest in civic engagement** – – Both youth and older adults have an increasing awareness of civic engagement as an opportunity for individual growth and development, yet aging and youth networks generally work separately on civic issues. When young and old work together, they become more aware of their interdependence.

- **Silo-ed Funding** – Similar to the situation with many other funders, ACF had one portfolio of funds dedicated to youth and another portfolio dedicated to older adults. These "silos" mirrored the silos of programs in the communities that ACF serves. Increasing interest in exploring the possibility of breaking down the artificial barriers between youth and adults brought some of these funds together to influence greater community outcomes.

- **Recognition of intergenerational strategies** — Intergenerational strategies are increasingly important to policymakers, program designers, philanthropists and residents alike. Programs just for youth or just for the physically challenged or just for adults rarely build on the common concerns and interests that can bring people together and provide a way to reweave the fabric of the whole community.

While these challenges are obvious in Arizona, they also are prevalent across the United States. Because community foundations are champions of change, many are willing to take the risks of being the first to test the waters on new programs such as Communities for All Ages. While they

may not have large discretionary budgets, community foundations usually have field of interest funds that can be used more broadly and applied to intergenerational solutions. Their staffs also are well versed in seeking outside grants and creating coalitions which leverage resources.

The Arizona Community Foundation and its 13 affiliates work statewide, in both urban and rural areas, to connect donor interests with community needs. Since the organization was founded in 1978, donors have established 885 individual funds including 30 support organizations, with endowment and trust assets exceeding $556 million. While most of these funds benefit specific causes, the CFAA initiative is encouraging some donors to rethink their giving strategies to include an intergenerational benefit.

There are few formal efforts in Arizona that are intentionally designed to make communities better places to live for all generations. Our hope is that this initiative will act as a catalyst in helping our communities leverage the benefits of intergenerational and intercultural resources as they look for ways to provide for their future needs.

Investing in Communities for All Ages

It all began in 2003, when the Arizona Community Foundation decided to explore how intergenerational strategies could be used to enhance the lives of all generations in urban and rural communities across the state. In collaboration with the Temple University Center for Intergenerational Learning, the developer of the Communities for All Ages model, and other national and community leaders, ACF created the Arizona Communities for All Ages initiative and became the first in the nation to take this concept into communities. At the inception, the Annie E. Casey foundation gave ACF a grant to document and to provide a summative evaluation of this initiative. While one goal of the documentation was to inform the development of the Arizona project, it also sought to inform other entities -- foundations, agencies, nonprofits -- on how this strategy makes sense from a community development perspective.

> "The Communities for All Ages approach brings together diverse groups of community organizations, youth and older adults to create real plans of action for their communities. It gets people out of their silos and helps them look holistically at the needs and resources around them. Our goal with this initiative is to help communities become healthier places for all ages—as we like to say, great places to both grow up and grow old."
>
> Bob King, President and CEO of the Arizona Community Foundation

To raise awareness about the value of a CFAA approach to community building and to learn from local community leaders about intergenerational efforts already in place, the Arizona Community Foundation conducted community forums in three regions of the state. Following this series of forums, a Request for Proposals (RFP) was issued. (The RFP is included as Appendix A of this publication.) In 2004, **planning grants** were awarded to *nine community sites* to help them assess the needs and resources of different age groups and to identify areas of common concern such as education and lifelong learning, transportation, housing, access to healthcare and social services, and individual/family support (see Appendix B). A three-year action plan was developed to address those issues using multi-generational strategies. The nine sites met together periodically at organized learning sessions to share experiences.

In 2005, the CFAA initiative awarded three-year **implementation grants** of $50,000 per year through a competitive process to *five* of these sites, including the rural communities of Ajo and Concho, the Golden Gate neighborhood in Phoenix, the South Park neighborhood in Tucson, and a coalition in Yavapai County. The four remaining sites were offered small, one-year grants to continue planning and exploring their communities. In 2006, a sixth site in South Central Phoenix was advanced to the implementation process.

Some implementation efforts were linked to strong community institutions, while others created new alliances. Some looked to individuals to lead change, and some were part of a shift in organizational thinking. Each site also secured supplemental funding or in-kind support for their efforts. Their largest expenditures were for staff, with their next major allocation for supplies.

In each site, diverse groups of community leaders, residents and organizations came together to form a CFAA team. Although they were given program guidelines, communities were empowered to follow different approaches and to build on existing local assets to address community needs. Despite these differences, all sites created collaborations among key stakeholders and created opportunities for generations to work together to address a community issue. Quarterly learning sessions were held to foster cross-site learning. Here's what happened in these communities.

Ajo in rural southern Arizona – Once a thriving mining town, Ajo found itself facing an exodus of much of its population when the mine was closed and opportunity in Ajo had all but dried up. Spearheaded by the International Sonoran Desert Alliance, the Ajo team created a vibrant multicultural and multigenerational program at the Curley School campus, an abandoned elementary school, as the permanent institutional anchor and **hub for intergenerational activity.** They nurtured opportunities specifically focused on the arts, cultural production and building employment skills. This truly community-wide, multigenerational asset now brings generations and cultures together through a variety of programs including GED, English as a Second Language citizenship classes, work mentoring, youth leadership training, creative classes that bridge generations, and artisan education.

In Ajo, not only diverse ages, but also diverse cultures came together as invisible social barriers were cleared away. Ajo offered classes for women and girls to learn to use tools. Residents taught diverse, age-old traditions to each other in hopes of keeping them alive into the future. More than 500 people gathered together for a Day of Peace Parade which celebrated their community's renewed dedication to making Ajo a good place to live.

One Native American girl in Ajo, who had been quite shy and reticent to engage in her cultural heritage, decided to participate in a program for young and old in gathering saguaro cactus fruit, an ancient Native American tradition. This girl so enjoyed the experience that two weeks later she took a leadership position in the program and worked with Anglo retirees to teach them the ancient fruit gathering techniques. This program brought her new knowledge, skills and leadership experiences as well as interaction with her own heritage and the cultures of others.

While once thought of as an abandoned mining town, Ajo is emerging as a vibrant, cultural center. Where there had been few community activities, now the calendar is filled with art classes, cultural exchanges and opportunities to celebrate individual and group accomplishments. The CFAA initiative has served as a bridge to bring the Anglo, Mexican and Native American cultures together, making life better for all ages and cultures.

> "This has been very positive. It makes me feel like we are doing the right thing here (in our community.) The Opening Day festivities were spectacular – cultural presentation, art, music. It felt like we were in New York at a really good opening of a gallery. I think people in the community are now coming back to the school – they see it as a center of cultural events, a place where you want to be."
>
> An Ajo resident

Concho in east central Arizona – Concho is a community of about 5,000 dispersed residents with little or no commerce in the town center. Building a stronger sense of community was an important driver for this isolated rural site. The CFAA team was successful in establishing the **Concho Community Center**, the only place in the community where people of different ages can congregate. Activities offered to all ages include after-school programs, senior lunches, social meetings, computer labs, a craft center, exercise classes and much more. A monthly newsletter, *Concho Connection*, was created to help widely-dispersed residents communicate with each other. The initiative also generated opportunities for intergenerational and intercultural exchange through community-wide events such as farmers markets and parades.

> "I've met the greatest people through this (effort). Bill and Betty are old, and they play really cool. They are outgoing. Betty plays the violin and Bill plays the guitar. They played at the farmer's market, and it was thrilling and fun."
>
> A Concho youth

Because there is little or no commerce in the town center, few residents had reason to come to town and little opportunity to get to know their neighbors. As a CFAA site, much of the Concho program was led by volunteers as they pitched in to run the after school programs and leisure classes and staffed the computer labs and the front desk. This brought people together either as volunteers or as participants and encouraged involvement and interdependence among all community members. Volunteer hours soared in the second year, more than doubling from the previous year. Volunteers range in age from 8 to 85, and participants range in age from infants to those in their 90's.

The staff at Concho succeeded in creating not only physical spaces, but also many opportunities for people of all ages and, again, different cultures to come together in ways they never had before. Many residents, who previously had a low opinion of Concho, were interested in being part of the activities. The Concho site launched a Memorial Day parade, the only one for many miles, to honor current and past military service. Residents came together to prepare for the parade, and they enjoyed the results together.

Golden Gate in urban Phoenix – The Golden Gate neighborhood is characterized by new immigrant families, many of whom are Hispanic. Led by Arizona Children's Association, the Golden Gate Community Center project transformed the existing center into one that empowered community members of all ages to create safe, healthy environments across generations and cultures. The Golden Gate team integrated **intergenerational strategies into existing programs**, ranging from Headstart to computer labs, improving and expanding on what already was in place. As a result, Golden Gate activities connect families, promote healthy lifestyles, provide leisure activities and art experiences, and create stronger connections in the community.

The work at Golden Gate was guided by a Leadership Team with members from the Area Agency on Aging, Casey Families Services, the Arizona Department of Economic Security, the University of Arizona Cooperative Extension and a local elementary school. The Golden Gate site had a highly-focused set of activities that included providing support for caregiver families, improving neighborhood safety, improving health, and providing opportunities for lifelong learning.

> "The program has brought together kinship families in a really solid way. It has created a real support net for them. There is a real sense of community. They've supported each other through cancer, incarceration, death. Lots of programs spend millions of dollars trying to do this. We have an amazing model."
>
> A Golden Gate institutional partner

They also helped establish a **neighborhood association** and encouraged other safety efforts to incorporate multi-generational approaches such as a domestic violence commission. They hired local residents (known as "promotoras") to go door-to-door in the neighborhood to identify needs and connect residents to health services. They also offered nutrition classes and mother-daughter dance classes. They offered literacy opportunities and encouraged adults to read to children. Finally, they incorporated cultural opportunities by hosting community-wide events including a Mother's Day festival, parades, beading workshops, and family portraits.

In one program, a youth group worked with older photography teachers to make photos of their community as they see it. The photo exhibit was presented to a city council member, appeared at City Hall, and went all the way to the State Capitol. These youth learned new skills, drew on their creativity, connected with their community and learned that their voices can be heard by adult opinion leaders. The two adults were deeply moved by this experience and agreed to undertake additional intergenerational photo projects in other communities.

In another program for kinship care, a group called Grandparents Together was formed using CFAA grant money to create a Kinship Care Network. This group was so successful that eventually grandparents took over leadership and ran the network on their own, keeping members connected, bringing in new families and offering support and services. In three years, they have assisted more than 1,000 families. These grandparents not only worked locally, but also addressed statewide issues by organizing nearly 800 grandparents to attend the "Grand-Rally" at the state capitol to raise awareness of the issues faced by grandparents raising grandchildren.

South Central Phoenix – This community faces blight, crime, fear, underutilization of resources and fragmentation. Still, deep-rooted bonds of family and community make South Central Phoenix a fertile ground for intergenerational approaches to succeed. Led by the Phoenix Revitalization Corporation (PRC), this urban effort worked directly with community leaders, training them to identify community strengths and needs and how to work for change. They created the **Community Leadership Academy**, teaching community leaders how to increase residents' awareness of community resources and to work with organizational stakeholders to raise awareness of the importance of intergenerational strategies.

The resident Leadership Academy was a multi-week training program to guide residents as they learned about the problems they face, identified strategies to improve their community and explored what they could do as residents to make a difference. About 100 residents participated in the Leadership Academy, and the PRC communicated the message to thousands of additional local residents, businesses and organizations through a bi-monthly newsletter. Training, skills, knowledge and support were provided to the group, which was approximately one-third youth, one-third middle-aged adults and one-third seniors.

> "Poverty, illiteracy, drugs blight got in the way and encouraged neighbors to turn away from neighbors. The Phoenix Revitalization effort has helped our community understand itself…naturally working together, across ages to fix things."
>
> A South Central Phoenix resident

One trainee – a mother of young children originally from Mexico – was quite reserved and unsure of her ability to engage others when she started the leadership training. Through the hard work at the sessions and exposure to community change strategies, she found her voice. This woman is now working with her neighbors to develop a local neighborhood association and "block watch" effort.

Residents who successfully completed the leadership training were invited to participate in the Community Action Team which is a multigenerational, cross-neighborhood effort to improve South Central Phoenix. Through the Community Action Team they raised awareness of gang issues, worked to diffuse potentially volatile gang problems and started to reweave the fabric of the community by being a consistent voice for peace and community improvement.

Tucson/South Park – The South Park neighborhood of Tucson, 60 miles north of the Mexican border, was facing increasing gang violence, community fear, and a lack of resources. With support from PRO Neighborhoods, an organization dedicated to community revitalization through active community participation, the Generations Unidas project wanted to create a vibrant and resourceful community. The goal was to make the South Park Neighborhood of urban Tucson a place where people of all ages worked and played together in comfortable community spaces. The Tucson team built **resident leadership through intergenerational activities** which addressed key concerns including safety, community beauty, raising the "voices" of residents, and promoting local art and culture. Intergenerational leadership teams were given special mini-grants to assist with projects that the community designed and implemented.

> "The emphasis…on intergenerational programming has heightened our awareness of just how powerful it can be to foster relationships between seniors and kids…I know that seniors feel valued and the work of their life esperiences is validated in programs where they work with youngsters, passing on skills and knowledge. Young people also find acceptance and nurture that they didn't get among their peers. In our beading circle, for example, it is obvious that the youngsters are learning more than just beading techniques. It's easy to see that patience, camaraderie, approval and even humor are perhaps more important than the beading designs that youngsters learned from seasoned adult crafters."
>
> A partnering library director

With the support of mini-grants, some residents focused on safety. They met with local police officers and planned an event to increase economic opportunity. A beauty committee worked to develop and promote a neighborhood association, supported park cleanup events and worked to beautify the local park. Other residents working on inclusion projects produced multicultural puppet shows, showed multicultural films at the library and sponsored multi-age board game competitions. Looking to arts and culture, still others brought multicultural workshops to town, offered a bilingual support group and sponsored a neighborhood outing to a Broadway musical.

One resident team specifically wanted to improve cultural opportunities in the neighborhood and appreciation for the cultural resources of the South Park community. They helped develop a workshop series at the new cultural center that attracted more than 200 residents. Cross-cultural understanding was fostered through beading workshops at the library. A multi-generational, multi-ethnic group of residents developed a number of arts projects that they hope to turn into a business.

With the start of the CFAA initiative, PRO Neighborhoods began working intergenerationally in just one neighborhood. However, by the end of the grant, they had started to use intergenerational approaches in other communities across Tucson.

Yavapai – Despite its physical beauty, this county in northern Arizona faces high mobility in its population, drug problems and lack of community connectedness. Youth Count and the Generations United coalition of Yavapai County (GUYC) led this project to create a place where residents saw people of all ages as equal partners in building a compassionate and viable community, where all generations thrived and each individual's needs, talents and strengths were valued, respected and engaged. In the first of a two-fold strategy, a Generations United coalition including more than eight nonprofits and agencies promoted intergenerational approaches among key institutional partners. Then they worked in select communities to help **promote leadership** and **implement intergenerational projects.**

In the community of Black Canyon City, the project helped local residents launch a community beautification project to clean up their town. They had never attempted an event such as this, and it was a substantial success as residents of all ages spent a day beautifying their community. They were so pleased with the results that the next year residents took on the project themselves for another intergenerational clean up day.

> "Our event participation grew in parallel with participation in the planning of events. People became stakeholders long before the actual event."
>
> A site leader

For the first time ever, the historically youth-focused organization Arizona's Children and the historically senior-focused Area Agency on Aging worked together on a grant application to secure support for a kinship care program. These organizations successfully secured the funds, worked together to survey kinship caregivers, developed a program and shared resources.

In another example, GUYC helped bring its partners together around the issue of substance abuse and prevention. Based on data collected through 14 community forums with residents of all ages, a Substance Abuse Task Force came forward with some unusual recommendations. Rather than dedicate new resources to traditional age-silo-ed services such as prevention for the young and treatment for older youth and adults, this coalition stressed the need for every outreach opportunity, support and service to be multigenerational. This was very new thinking and highly influenced by the engagement of these institutions in the CFAA initiative.

Value for the Foundation and Arizona

This initiative broke new ground across Arizona and at the Arizona community Foundation. In doing so, the results went far beyond the specific investment goals.

Bringing ACF into the Spotlight

At the Arizona Community Foundation, CFAA brought the resources of various funds together to support the needs of the broader community, thereby breaking down some of the old, traditional granting silos. Grants which once might have focused solely on youth, education or the environment, for example, were given to support broader community issues, considering multigenerational needs.

The Community Foundation's increased interest in promoting community involvement of people 50-plus was instrumental in ACF's receiving an Atlantic Philanthropies Community Experience Partnership grant to build civic engagement among older residents. CFAA offered a natural starting place for applying this grant.

Because of the CFAA initiative, ACF was in the local, state and national spotlight for its innovative funding strategies. ACF staff presented on this initiative at local grantmakers' forums and at large gatherings such as the state conference of the Arizona Library Association, the Arizona Association of City Governments, and The Governor's Conference on Aging.

ACF also received a considerable amount of attention for this groundbreaking initiative outside of Arizona. Most notably through association with the blue moon fund and the Annie E. Casey Foundation, ACF's work was highlighted in the *Viable Futures Toolkit*, a national multi-media resource designed to instruct organizations and agencies on how to build Sustainable Communities for All Ages. This toolkit, DVD and website were disseminated to a wide variety of national networks, such as the National Governor's Association and National AARP. ACF presented at the Generations United National conference and was featured at national conferences of Grantmakers for Children, Youth and Families; Grantmakers in Aging; and the American Society on Aging/ National Council on Aging.

Added Value for Arizona Communities

Where organizations and communities once focused on the issues of only one segment of a population or culture at a time, increased collaboration is being noticed across sectors, as is an increased sense of connection across ages. While the state still has a long way to go, community programs and services, more and more, are recognizing the benefits of looking at the broader picture, which brings generations together to solve problems in ways that benefit everyone.

The CFAA initiative marked the first time lead agencies at any of the sites had intentionally used intergenerational strategies in their planning. By the end of the four years, intergenerational approaches were being incorporated into programs beyond specific CFAA-supported activities. For example, the Phoenix Revitalization Corporation in South Central Phoenix quickly embraced intergenerational approaches as a natural fit and changed their training model to ensure that different age groups would work together to create community change in all programming, not just ACF funded projects.

The act of bringing the generations together consistently and in a variety of settings has improved the attitudes of residents and community leaders about their own communities and community potential. When Golden Gate started the Kinship Care network, it provided the staff. During the course of the project, a group of grandparents took over responsibility for continuing the program, because they realized how important it was to the community to keep the program alive. Now, regardless of the presence of an institutional partner, the community comes together to support these families. In Ajo, when it became clear that some of the space in the Curley School needed to be renovated, a large group of community volunteers rehabilitated classrooms and offices and painted a large mural on the side of the building. These residents took ownership to ensure that the effort succeeded.

Residents of all ages were touched by CFAA initiative efforts. Intergenerational activities created connections and understanding among the generations, developed leadership and fostered community pride. For example, one of the intergenerational resident groups meeting in the South Park neighborhood of Tucson originally gathered to share a love of beading. This grew into a small business as they began to sell their beadwork at fairs and city events. In another instance, a youth in Concho was encouraged by two adult artists to convert her watercolor pictures into greeting cards. With their assistance, she succeeded and has been selling her cards at the local farmer's market. Where ACF's investments build or strengthen social capital and social networks, the seeds of ongoing change have been planted.

Lessons Learned from this Investment Approach

In documenting the lessons of the project as the sites planned and implemented their programs, what was done well and what could have been improved stand out clearly.

Lessons learned from CFAA work at the sites were documented for ACF by Nagle and Associates and include the following:

➜ **This Work Takes Time** – Over the three-year evaluation period, we were reminded that change takes time (see Appendix C for a full timeline) and that the goals would not be reached overnight. In some instances, not even a year or three years was adequate. This was especially true for the staff of lead organizations, even though they were truly dedicated to creating intergenerational opportunities. Several described their "aha" moments when the reality of exactly what they were doing and what was required came together for them.

Looking ahead, we agree on the need for multi-year projects and defined processes to help lead staff understand fully what they must do. Logic models should be developed at the planning stage so that they have a clear road map of short-term, mid-term and long-term objectives. They also need to learn how to effectively communicate their goals to other partners to be successful.

➜ **Build on Families** – While intergenerational approaches may seem foreign to many organizations, they are more often than not an accepted part of family life. Several sites were impressed with the success of their family events and the frequency with which families requested more of these kinds of opportunities. Including families creates a more natural way to bring generations together in communities, as younger and older residents look for common issues and interests. One site from South Phoenix commented that the concept of *la familia* in Latino families naturally is intergenerational, often with up to four generations living together, so programs and services that serve all ages were well received.

We now consider the family unit as a core CFAA building block.

➜ **Bring Generations and Cultures Together**– Many of the groups learned that bringing people of different cultures together for activities increased both intergenerational and intercultural awareness and connection. Sometimes the same reasons that drive generations apart also drive cultures apart. For some people, the negative feelings they had for community members of different cultures were tied to their not knowing one another. CFAA activities specifically made room for people of all ages and cultural backgrounds.

We can build on this lesson by intentionally integrating multi-cultural opportunities as part of the synergy.

➜ **Impact Residents and Institutions** – From the beginning, CFAA goals were to positively impact and influence both a community's residents and its institutions. Some communities were able to stay focused on this goal of serving both, while others either worked mostly on residents or mostly on institutions. It was difficult for sites which went with one determined focus to then address the other.

Future efforts underscore the importance to focus on both residents and institutions as sites work to influence change.

➜ **Lead by Example** – To convince other organizations to buy into the initiative and to include intergenerational approaches into their programs and services, lead agencies believed they first had to demonstrate the value of the CFAA concept through concrete programming. When organizations were actually able to see the results of generations working together to address community needs, they were more inclined to become part of the initiative.

Organizations cannot advocate effectively unless they lead by example.

➜ **Challenge Youth** – All sites struggled with engaging youth, and few succeeded in developing intergenerational leadership including youth. Activities that did not require a long-term commitment such as a picnic or those which targeted youth such as an after school program were more successful. Other activities that offered on-going, intergenerational opportunities struggled to recruit youth. Sites that developed youth-directed activities such as photo essays or video projects found greater success.

Recruiting and including youth should be a focus from the beginning to ensure their engagement and longer-term contributions. Asking youth what they propose is a good way to start.

➜ **Encourage Institutional and Policy Change** – Generally, intergenerational activities are not commonly accepted and promoted. Grant requirements, work/school day differences, and accepted ways of interacting all reinforce existing age segregation and conspire against intergenerational approaches. The institutions that were most likely to embrace CFAA goals had previously overcome some barriers to CFAA institutional strategies. Those institutions with less exposure and experience had a harder time and were often likely to return to their old ways,

even after being exposed to the power of intergenerational benefits. In addition, CFAA sites were so deeply immersed in their day-to-day activities that they had little time and few opportunities to take the message out to other institutions in an effort to break down barriers.

Time needs to be prioritized to encourage and allow local CFAA sites to approach other institutions about the benefits of intergenerational planning.

➜ **Don't Under-estimate Age-Segregation!** – A serious concern involves institutional barriers which continue to make intergenerational strategies a challenge. For example, one site noted that while the idea is catching on in the community-at-large, their local health department issued 41 RFPs, each addressing common issues but with a single population focus. Policy and institutional barriers are not insurmountable, and it is unrealistic to believe that the sites could affect substantial policy change in just three years. But it is clearly a reminder that there is much work to be done to create an environment that universally welcomes intergenerational approaches.

We have faced the fact that the institutionalization of age segregation should not be underestimated. Specific institutional targets in site communities need to be identified and approached to encourage change. CFAA projects, drawing on the resources of local sites, can contribute to identifying possible policy and program change opportunities.

➜ **Develop Internal Marketing Strategies** – At the Arizona Community Foundation, the CFAA initiative was at first considered revolutionary in what it suggested. As a key leader in ACF's programs department, Jacky Alling saw the potential and the benefits and worked to tell the story within the foundation and to other opinion leaders and philanthropists. She took the special opportunity during ACF staff and leadership transitions to describe the philosophy and the impact of CFAA. Her efforts resulted in unwavering, continued support during a time of change. She developed a one-page description of the initiative for the foundation's website as well as a presentation to the Board of Directors.

➜ **Commit to a Logic Model** – In the first year of implementation, the Technical Assistance Team helped each site develop a logic model. Most site staff had never developed an outcome-oriented logic model, so the process required substantial assistance to conceptualize and develop each site's document. Most sites recognized the value in clarifying their purpose and direction in the beginning. The model also helped them communicate with community partners and other funders about their goals. Unfortunately, few of the sites reflected on their model as they progressed or used it to chart or evaluate their progress. Because there was no overall CFAA initiative logic model, identifying overall impact has been challenging.

Future efforts will provide more logic model training to the sites during the planning phase and hold them responsible for using the logic model as a learning tool. For each multi-site initiative, an overall logic model will be developed to track progress and facilitate evaluation.

➜ **Invest in Evaluation** – Two major CFAA strategies were to capture what was learned through the initiative and to help sites undertake self-evaluation. While the evaluation tools did gather information about intergenerational approaches, they did not succeed in helping sites complete appropriate and effective site-specific evaluation. Too few resources were available to conduct an outcome-focused evaluation that captured initiative-wide, systematic impacts on institutions, communities and individuals. Sites did not prioritize the evaluation, as they had neither the funds to hire outside evaluators nor the training to do it themselves. This hindered their ability to measure progress and to understand if their strategies worked or failed and why.

Greater thought is now being given to evaluation design, responsibility, and outcomes. Mandatory participation is necessary for success; sites need to have the necessary training to evaluate themselves or resources to hire an outside evaluator.

➜ **Think Carefully About Staffing** – Over the course of this initial three year program, three sites experienced core paid staff turnover, which led to repeated re-training and, consequently, slower implementation. Some sites relied heavily on volunteers and interns, often with limited ability or willingness to move projects forward. In one case, Vista staff was very successfully engaged. At another site that had only one staff member, the experience of working with a Vista was frustrating. Generally, sites that relied heavily on volunteers experienced the most difficulty in making consistent progress.

Future projects should carefully consider the pros and cons of using volunteers. While they can be a great asset, they must be supervised and managed for consistent results. Where volunteers contribute, special care should be given to recruiting and retaining them.

➜ **Sustainability Requires Leveraged Support** – All of the sites used the ACF grant as a springboard to leverage additional funds. These supplemental funds supported some of the activities that brought generations together in various communities. In two cases, ACF staff were successful in helping CFAA sites in Phoenix leverage new funding sources to support ongoing CFAA and community development work in the future. It is unclear if CFAA efforts in the other sites in rural communities will continue to raise additional funds when core ACF funds are no longer available. Technical assistance strategies were not sufficient to truly assist the sites in developing sustainability plans or making connections to other local, state or national funding sources. Additional support should be given to help communities create sustainable programs that build on their CFAA efforts.

➜ **Benefit from a Leadership Team** – Each site was required to establish a Leadership Team of external institutional and community partners to help guide and implement their work. Each site established a team, but few remained active over the life of the initiative, and none of the teams grew. It was apparent that sites did not understand the team's role, how to maximize participation, how to use the individual skills of the team members or the importance of increasing support.

Future projects will emphasize the benefits of an effective Leadership Team and how to maximize their contributions.

➜ **Honor Multiple Models** – As an exploratory initiative, no one model was prescribed. The range from central city urban settings to small, isolated rural towns suggested multiple models to meet the needs of the diverse sites. Lead institutions varied from long-standing nonprofit organizations to newly-created groups coming together especially for this project. Each required different partners and different staffing patterns. This diversity was good from the standpoint of meeting individual site needs but challenging for designing technical assistance and determining common lessons learned.

We agree that while it is important to identify the common ground among diverse sites, it also is critical to empower communities and provide them the proper training and tools to allow for individual situations and needs.

➜ **Encourage Site Interaction** – Site leaders were not familiar with one another before the CFAA work brought them together, so interaction among sites was slow to develop. Later in the process, in the second and third years, site representatives were better able to explain their work, which led to guidance and support of one another. This was facilitated by allowing sites to host CFAA learning sessions in their communities. Several site visit exchanges were made, and the sites shared information and other resources.

It is apparent that sites can learn from one another, so opportunities for greater, ongoing exchange must be fostered. Sites should be aware from the beginning of this expectation and opportunity.

➜ **Fine-Tune Initiative Oversight and Technical Assistance** – Technical assistance was appreciated by the sites, but there was no clear technical assistance plan, nor clear roles, expectations or division of labor for members of the Technical Assistance Team. Some sites were more accepting and eager to take advantage of this resource, while others were reluctant to take the Technical Assistance Team's advice. In some instances, there was confusion as to who was in charge and ultimately responsible for moving the CFAA initiative forward.

An initiative director/coordinator/manager either within the lead organization or hired externally, would help keep the individual sites moving, oversee the Technical Assistance Team, and keep the larger picture in focus.

➜ **Consider Differential Funding** – Not all sites began on an equal footing. Each received the same $50,000 base grant, but that grant meant different things to different communities. Partner institutions came in with varying resources already in place, and there were different abilities to generate additional support. Where the CFAA project was embedded in a larger institution, more financial resources were available and there was more program stability. In contrast, sites in isolated rural areas with few institutional resources did not have the same advantageous support.

Future grants should be of varying amounts—determined by the resources available to the site—in order to create a stable, sustainable project. Longer grant periods and additional resources should be considered for areas with greater need.

Stay Tuned

Groundbreaking work can be daunting, but it promises to take your organization's impact in the community to a new level. Fortunately, ACF has seen what we believe to be a good return on investment in this work and have made a commitment to another full grant cycle and to build a statewide Communities for All Ages network.

Jacky Alling continues to oversee the next phase of Communities for All Ages programming at the Arizona Community Foundation. A new Request for Proposals was issued in May, 2008. Five to six diverse sites will receive up to $10,000 for planning. ACF anticipates four to five implementation grants to support four more years of implementation. These grants may be as much as $35,000 the first year, $30,000 the second year, $25,000 the third year and $20,000 the fourth year, depending on available funding. This time, participating communities will be asked to provide a two-to-one match for each grant.

Building upon the lessons learned from phase one, ACF staff, a program director and a cadre of consultants will help sites design their community assessment/planning process and develop intergenerational strategies to address community needs. Representatives from the pilot sites will be expected to attend up to three CFAA Learning Community sessions each year.

> "Community Foundations and United Ways are well suited to adopt the Communities for All Ages approach in their strategic grantmaking. Funders are in a better position than government agencies to take the lead and to take a bit of a risk when encouraging their communities to invest in this kind of social change."
>
> Jacky Alling
> Vice President, Programs
> Arizona Community Foundation

The Arizona Community Foundation also will serve as a key partner in the CFAA National Network. The W.K. Kellogg Foundation has awarded the Temple University Center for Intergenerational Learning a three-year grant to expand the number of CFAA sites across the country. This grant will work to build a national network to promote cross-site learning and offer a new story to communities about an effective way to improve the quality of life of their residents -- particularly vulnerable children, youth, families and elders. ACF's initial pilot sites and its new grantees will be an important part of the network.

Can This Approach Work for You?

After going through one full initiative cycle, a summative evaluation and preparing for a new cycle, Jacky Alling reflected on the critical success factors for ACF and offered some advice for organizations considering whether or not to adopt this approach in their grantmaking. "The guiding framework for the Arizona Community Foundation's grantmaking and strategic initiatives is, leadership, leverage and innovation. So for ACF, the Communities for All Ages initiative was a great fit for the strategic direction of the board, the program committee and staff. Having this kind of institutional alignment is key," Alling remarked.

Using the ACF programmatic rubric, Alling reflected on her own organization's readiness to take on this approach:

Leadership

In Arizona, the two fastest growing populations are elders and youth. ACF was eager to play a leadership role in reversing the stereotype about elders in a state that is renowned for its segregated retirement communities. The home of the original Sun Cities, there is often the perception of antagonism between elders and youth, and the competition for resources.

Asset-based community development approaches that do not focus on a specific population, but rather on how a community fares across the life span, make perfect sense. But it wasn't always easy. Alling mentioned that ACF's Communities for All Ages work did not automatically fit in with the work of many other grantmakers in aging or funders focusing on children and youth. There had been thinking that ACF would be able

to convince a large variety of funders, agencies and donors to participate in this initiative, but those barriers did not break down automatically. It also was difficult at first to get organizations to realize that this is NOT just another program but rather a new lens/approach to addressing community needs and improving quality of life for all residents.

It took a real commitment to leadership to stay the course on this work and to invest in significant outreach and education on life span approaches to the broader community.

Distinct activities included holding awareness-building forums and making many public presentations in the community, before, during and after launching the initiative. The community conversations around CFAA served multiple purposes. Input was received that was crucial to helping design the initiative. The conversations also created a buzz and excitement, and it helped spread the word to audiences that had interest beyond just applying for the grant.

Leverage

ACF is one of the largest and fastest growing community foundations in the nation, but it does not have a lot of discretionary and field of interest money to conduct its strategic grantmaking. In many ways, the special opportunity to pool resources made the Communities for All Ages approach very practical. Usually community foundations have field of interest funds that are at times very restricted to a certain aspect of community development or specific populations. When a community foundation does not have a lot of discretionary money, it can offer more significant grants over time by pooling diverse resources and using them to take a more comprehensive approach to community development.

The foundation has historically had a stronger emphasis on children and youth in its funding portfolio, so the opportunity to leverage those resources to invest in social capital involving older adults for the greater community good was also very attractive.

Because this approach is comprehensive, CFAA communities have an opportunity to bring in a wide variety of partners such as education agencies, transportation systems, libraries, and community colleges, to name a few. These kinds of diverse partnerships encourage the alignment of resources from public, private and nontraditional entities.

ACF has consistently made a commitment to extensive education and outreach work, and over time it has been able to attract local funds to co-invest in several of the Communities for all Ages sites. In Phoenix, a coalition of corporate, government and private funders has come together to continue investments in two CFAA communities. In part, the Communities for All Ages work served as the seal of approval. ACF also has been able to attract some smaller investments from national foundations, most notably, the Annie E. Casey Foundation and Atlantic Philanthropies.

Innovation

"Organizations should ask themselves two questions about their innovation quotient," Alling says, " Are you a true champion for change? In addition to being ready to ask communities to change their attitudes about how they develop and implement their programs, is your organization ready to change its own attitudes about grantmaking?"

In taking on this grantmaking initiative, funders should be prepared to empower communities to develop their own visions and action plans and then provide them with adequate training and support to do that work. That sounds easy, but some funders might not have a comfort level with that.

"In the Arizona CFAA work, participating communities played a key role in helping to design this initiative." says Alling. The planning period was key for the grantee coalitions and the consulting team to work together. "In essence – we allowed the communities to develop the grant guidelines for us." The unique and innovative features of this work demanded that. It was not one size fits all. This framework plays out very differently in different communities. What resulted was an innovative array of diverse approaches. In one small rural community, it took on the form of an arts-based economic development strategy involving multi-generational training and artist live-work spaces in a redeveloped school. In another it took on the form of an intergenerational leadership academy in an urban core neighborhood. Another site involved a county-wide coalition of nonprofits focused on community improvement through uniting the generations.

Capacity

Some organizations may need to assess their organizational ability to take on this scope of work as a multi-year initiative, as ACF did. Alling admits, "This might not be a good fit for a foundation or organization that has very restricted grant giving guidelines, has a highly structured impact measurement model and does not have the capacity or inclination to invest a lot of human capital."

Even if organizations are not ready or do not have the capacity to take on a Communities for All Ages comprehensive multi-year initiative, there are viable alternatives. Every funding organization can think about embedding this life span approach into all of its grantmaking. What seems complex is really very simple. Think intergenerationally in terms of physical, social and institutional infrastructures. If there is a public health initiative, think about how programs and facilities serve whole families from grandchildren through to the grandparents. If there is an education grant program, consider how education touches people of all ages. "Most states have P-20 commissions looking at education from pre-school through college," Alling states. "Doesn't it make more sense for all of us to think about education as P-life?"

There are now resources such as the *Viable Futures Toolkit* (www.viablefuturestoolkit.org) to help organizations assess whether or not this approach can work for them and identify some places where it could be started.[1] In addition, Alling offers this short checklist based on the Arizona experience:

- Is there an organizational commitment to strategic grantmaking?
- Are there indicators that community coalitions could be mobilized around this issue?
- Does your organization have the leadership capacity to encourage governmental, nonprofit, corporate and philanthropic partners to invest in this kind of community change?
- Are you ready to "stay the course" and to invest in long-term change?

If the answer is YES to all of the above, we strongly encourage you to consider adopting this approach. Get ready to be inspired, challenged, befuddled, amazed and proud as you join the community of those creating communities for all ages!

1 Another useful publication is the Annie E. Casey Foundation's *Elders as Resources* (www.aecf.org), which offers a menu of ways to apply the talents of older residents to the needs of other generations.

Appendix A. AZ Communities for All Ages Request for Proposal

Discovery into Action Implementation Grant 2004 Request for Proposal

Background:

Communities for All Ages (CFAA), a new initiative of the Arizona Community Foundation, focuses on the challenges and opportunities facing both the younger and older populations in Arizona. This life span approach to community building is designed to promote the well-being of children, youth and older adults, strengthen families, and provide opportunities for mutually beneficial interaction across age groups. Through this initiative, diverse groups of community leaders, residents, and organizations are working together to address common concerns, such as education and lifelong learning, civic engagement, transportation, housing, access to health and social services, and individual/family support. In a state where young children and older adults make up the fastest growing segments of the population, there are few efforts that are intentionally designed to make communities better places for growing up and growing older.

Overall Plan for the Initiative

The CFAA Initiative consists of four phases: (1) Awareness building; (2) Discovery and Planning; (3) Implementation, and (4) Continuation.

Phase I: **Awareness Building / Summer 2002 – Fall 2003**
Three Connecting Generations, Strengthening Communities conferences were held in Tucson, Tempe, and Prescott on September 23, 24, and 25th, respectively. The intent of the conferences was to raise awareness among key stakeholders regarding the conceptual framework for *Communities of All Ages* provided an opportunity for the Foundation to launch the CFAA Initiative.

Phase II: **Discovery and Planning / Oct. 2003 – Oct. 2004**
Following a competitive RFP process, nine sites from across the state were selected to receive nine- month *Communities for All* Ages planning grants. Deliverables for this phase included a "Community Profile", due October 8, 2004, and the development of a three- year action plan to be submitted as part of this grant application.

Phase III: **Implementation / January 2005- December 2006 – Defined in detail in RFP**

Phase IV: **Continuation / Jan 2007 and beyond**
Once each site has had the necessary time and resources to begin implementing their plan of action, it is important for both the site leadership and the funding sources to identify strategies for continuing the work. This phase will focus on developing opportunities for strategic partnerships and diversified fundraising approaches involving the public, corporate, nonprofit and philanthropic sectors - both locally and nationally.

Request for Proposal (RFP) Guidelines and Procedures

Eligibility:

CFAA Implementation grants are only available to eligible CFAA Discovery into Action Planning Grant teams that have:

1. Developed a collaborative CFAA team comprised of critical community stakeholders;
2. Completed a community assessment process which identified what is in place to support their vision for a *Community for All Ages*, as well as the gaps and obstacles that exist;
3. Submitted a Community Profile report based on the assessment process to the Arizona Community Foundation Office by **October 8, 2004** (receipt date).

ACF Funding Available:

It is expected that up to four grants of $50,000 for each year will be awarded. The implementation phase will last for 2 or 3 years, depending on funding availability. ACF funds should be used for specific activities and projects **within** the implementation plan. Sites should demonstrate a plan to secure other funding sources for their comprehensive, long term vision. Each year, implementation sites will be asked to submit a proposal for continued funding.

As part of the review process, it may be determined that certain sites are not ready to move into the implementation phase and may be recommended instead for an extended planning grant in the range of $10,000.

Lead Agency:

One lead organization will need to remain as the primary contact and fiscal agent on the application to the Arizona Community Foundation via the Foundation's on-line process (see below). Responsibilities of the Lead Agency include:

- Submitting the grant and serving as the fiscal agent for the project;
- Submitting progress reports to ACF and others as needed;
- Dedicating staff time to lead the project;
- Convening the CFAA Team; and
- Serving as the principal point of contact to the support organizations and ACF.

Prior to applying, the lead organization MUST be registered and have completed a profile on the Foundation's website on www.azfoundation.org.

CFAA Discovery into Action Implementation Timeline

Date	Activity
Oct. 8, 2004	Deadline to submit "Community Profile" to the Arizona Community Foundation.
October 26, 2004 5:00PM	Implementation Grants Due On-line to Arizona Community Foundation 5:00PM
November 22, 2004	Grant Notifications via mail
December, 2004	Meeting with Grantees/Funds Dispersed

Overview of application:

Pilot sites must respond to questions below that address the three- year CFAA Action Plan for their targeted area. Within the context of the broader vision of the site's three- year action plan, implementation applications should request funding for **specific activities and projects.** For year one, details should include specific strategies and actions that will move the team toward their stated goals in creating a *Community for All Ages*. Applicants should also identify people/ organizations responsible for the activities and provide a budget for the resources needed.

In more general terms, applicants should outline the continuation of implementation activities for years two and three. These activities should include projections of strategic partnerships, leveraging opportunities, and diversified fundraising approaches involving the public, private, nonprofit and philanthropic sectors. Projections on the resources needed for these activities should be also included.

Requirements:

Each applicant MUST answer the following application guidelines via the Foundation's web-site, www.azfoundation.org. The application is posted on the Grant Application page of the website. For more assistance in using the web-site, call Jacky Alling at 800/222-8221 ext. 56 or e-mail her at jalling@azfoundation.org. In addition, sites are encouraged to submit additional Action Plan materials (tables, graphs, logic models) to Jacky via email or mail at :

2201 E. Camelback Rd., Suite 202
Phoenix, AZ 85016 att: Jacky Alling, Program Officer

All application materials must be received by 5:00 p.m. Tuesday, October 26, 2004.

I. Capacity of the Lead Organization and project participants

1. Provide a BRIEF profile of the lead organization, how this project fits into your mission, and the role your organization will hold in facilitating **the implementation process. (150 word limit)***
2. Provide a list of all collaborative partners and their roles in this project.
3. Are there other groups/institutions/persons you plan on engaging in this project?

*** Please note:** *Panelists will refer to each site's 10 page Community Profile Report for information on the planning process and descriptions of the community.*

II. Implementation/Three-Year Action Plan

4. Describe your team's vision of a Community for All Ages.
5. State the specific goals for reaching this vision.
6. Discuss the multi-generational/lifespan strategies that could be used to address these goals.
7. **For each strategy,** please answer the following questions ***with more detail in year one and projected activities in years two and three.***
   i. What are the action steps associated with this strategy?
   ii. Who is responsible and who else needs to be involved?
   iii. What are the resources (e.g., funds, materials, personnel) you need to accomplish these steps?
   iv. Describe any resources that have been committed and that you are going after? Please document evidence of commitment in your attachments.
   v. What are your expected outcomes and how will you measure them?
8. Do any of these strategies relate to other community initiatives or projects? If yes, how?
9. Please provided a detailed timeline for the first implementation twelve -month period as well as a more general timeline with projected activities in years two and three.

Selection Criteria

Criteria utilized to evaluate the applications include:

- Evaluation of the planning grant process deliverables: the completeness of the Community Profile report; strength and clarity of the three year action plan.
- Evidence of ongoing involvement of a wide-range of community stakeholders including seniors and youth;
- Active participation from institutions that are important to the short-term and long-term success of the project.

Note about the on-line application: You may find it easier to create your answers in a Word document, then cut and paste the text into the application. DO NOT format your answers using: bulleted lists, underlining, bolding, the ampersand character "&", or smart quotes. Use of these items may cause problems when submitting, and will not show in your application. Since the text will read in one long paragraph, ***please be as concise as possible.***

III. Implementation Budget

A budget outlining the use of your $50,000 is required as part of the application. Grant funds can be used for expenses such as:

- Staff time for overseeing the project;
- Consultant fees to assist the CFAA Team in the implementation process;
- Fees to compensate for time devoted to planning and activities such as childcare expenses for participating parents, youth stipends, refreshments for meetings;
- Travel/lodging expenses for meetings, including meetings at the Arizona Community Foundation;
- Costs incurred in documentation and evaluation;
- Website development and technology;
- Printing, mailing, conference calls, etc.; and

Other expenses that have been clarified as appropriate in consultation with Foundation staff.

Please Note: You can not submit the budget page on-line. It is provided as a separate PDF on our website. Print out the budget page before proceeding to the on-line grant application. Required Program budget pages must be mailed, along with the other attachments to: **2201 E. Camelback Rd., Suite 202 Phoenix, AZ 85016 att: Jacky Alling, Program Officer**

Budget narrative

Please provide a narrative for the project budget for year one, describing exactly how the grant funds will be utilized. In addition to the detailed budget for year one, please provide projected general budget information, to the best of your ability for years two and three.

Communities for All Ages Implementation Grant Request

Please provide the following budget for year one of the implementation plan.

Item	Amount Request from ACF (Column A)	In-Kind Donations (Column B)	Money From Other Sources (Column C)	Total Budget Add Columns (A+B+C)
Personnel/Salaries (List titles and % time on project)				
Subtotal, Personnel				
Benefits (15% of personnel)				
Total, Personnel				
Program Expenses				
Office Supplies				
Printing/Duplicating				
Mailing/Postage/ Delivery				
Materials Purchased				
Telephone				
Equipment Purchase – specify type				
Local Travel (_____ miles x ____)				
Other (specify)				
Subtotal, Program Expenses				
Total Expenses (Personnel + Program)				

Appendix B. AZ Communities for All Ages Community Profile Guidelines

Maximum – 10 pages single spaced
(attachments allowed)

1. **Introduction and Approach**

   A. Briefly describe your process in collecting data for the Community Profile

   - Which core elements (or substantive areas) did you focus on and why?
   - Provide a brief overview of your planning process and who was involved.
   - Provide a brief overview of data collection activities (surveys, focus groups l interviews, etc.). Please attach any data collection tools in Appendix.

2. **Demographics**

   A. Provide a brief demographic profile of community touching on

   - Age
   - Race/Ethnicity
   - Income

   B. If available, provide population projections. Will certain groups experience more growth than others?

3. **Issues, Challenges and Needs**

   A. What issues, challenges or needs were identified by each of the following:

   - youth
   - families
   - older adults

   B. What were the major areas of common concern and major differences among groups?

4. **Service Delivery**

   A. What services exist in your community to meet the needs identified by:

   - youth
   - families
   - older adults

   B. What is the level of awareness of and accessibility of these services?

   C. Are any of these services delivered from a lifespan perspective? If yes, please explain.

   D. Are there any gaps in services for:

   - youth

- families
- older adults?

E. Are there any gaps in services that affect all age groups?

5. Conclusion/Summary

A. What are your major leanings from this planning and data collection process?

B. What are the major challenges to moving toward a community for all ages?

A. What are the issues that should be addressed in order to more your community for all ages?

Three-Year Action Plan

(no maximum set yet)

1. What is the vision for your Community for All Ages?
2. What are the goals for reaching this vision?
3. What are the multi-generational/lifespan strategies that could be used to address these goals?
4. For each strategy, please outline a three-year timeline with more detail in year one and projected activities for years two and three.
   A. What are the action steps associated with each strategy
   B. Who needs to be involved
   C. What are the potential resources you can go after to get this done.
   D. Does this strategy relate to other community projects? If yes, how?

Appendix C. Initiative Timeline

Phase I – Initial Design, Application, and Awareness Building
(Aug 2002 to Dec. 2003)

- Advisory Group Planning
- Work with Nancy Henkin and Donna Butts on developing concept of CFAA
- Regional Conferences in Sept.03
- Launch Planning Grant RFP process
- Choose pilot sites

Phase II – Discovery and Planning
(Jan 2004 to Oct. 2004)

Discovery
(February-March-April-May)

Utilizing the 9 core elements of a Community of All Ages, sites will **develop and implement a community profile by examining a** range of issues to better understand how their community currently addresses the needs of all age groups. A variety of methods for gathering information about your community should be used. Areas to assess **may** include:

- Physical infrastructure (things related to the "built environment and land use issues, like housing, open space, transportation)
- Education and Lifelong Learning
- Civic Engagement
- Family Support and Caregiving
- Culture and Recreation

Project Deliverable: The result of this information gathering period, will be the development of a CFAA Community Profile that will be submitted to ACF in October. This document could also be distributed as a resource in your community.

Creating a Vision and Developing a 3 Year Action Plan
(May-June-July-August-September)

Based on the observations and findings from the community profile, each site will develop a 3-5 Year Community for All Ages Action Plan. Each site will prioritize specific and measurable actions to address the gaps identified in the CFAA Community profile, as well as build upon the assets. The Plan should denote specific actions that would take place over the next three to five years to implement the vision of their community of all ages with or without ACF implementation funding.

Project Deliverable: Action Plan submitted to ACF in early October.
By the end of October, ACF will invite up to 6 sites to submit an Implementation Proposal. The Proposals should denote what would be done with a three year implementation grant (ranging from $50,000 to $75,000 a year for each of three years), and efforts to sustain and enhance the project- both during and after the three year grant period- through some combination of local, state, and national resources.

Phase III – Implementation
(Nov. 2004 to 2007)

Implementation Proposals will be reviewed in November and grant awards announced in December. It is expected that up to 4 sites will receive implementation grants.

First Year (2005)
Advanced Planning and start-up of implementation activities

Second Year (2006)
Implementation activities fully underway and beginning to identify other sources of support for the project (local, statewide, or national)

Third Year (2007)
Completion of implementation projects, other funding sources secured.

Phase IV – Evaluation/ Documentation
(Beyond 2007)

Case Studies in the Viable Futures Toolkit Series:

1. Jefferson Area Board for Aging, Charlottesville, VA: Chapter 1

2. Jefferson Area Board for Aging, Charlottesville, VA: Chapter 2

3. Arizona Community Foundation

4. New Columbia Community, Portland, Oregon

All are available at www.viablefuturestoolkit.org.

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