

GRANTS IN AGING: HOW TO GET STARTED

Each foundation has its own unique style, values, and customs, and so the path each chooses to begin to make grants in aging will vary. Consider these potential ways your foundation might approach grantmaking related to older people:

- **Integrate aging into your existing strategies and programs.** Expand your funding interests to include older adults. For example, a focus on children, youth, and families might include grandparents caring for grandchildren. A focus on arts and culture could include programs for older audiences or a community art exhibition featuring art by older artists. The John Gogian Family Foundation expanded its current interests to include programs for older adults.

The John Gogian Family Foundation in the Los Angeles area began to award grants related to aging in 2012, and the Foundation plans to grow its funding in aging as grantmaking increases from about \$500,000 annually. Older adult grants are building on the Foundation's prior interests. For example, funding for developmentally disabled youths and adults may expand to include housing and assistive technology for developmentally disabled older people, and the grantmaking area that addresses abused and neglected youths can enlarge to include elder abuse. Initial aging grants were awarded to a couple of organizations funded in the past for developmentally disabled youth programs, which also have programs for developmentally disabled older adults.

- **Add the talents of older adults to help your foundation achieve its goals.** For example, a focus on K-8 education might include literacy tutoring by older volunteers for children in public schools and libraries. A focus on health and obesity might include training older adults to present cooking demonstrations and tastings of healthy foods in afterschool programs and at community events. The Maine Community Foundation funds older volunteers to further its interests in civic engagement and the environment.

Civic engagement and the environment were among the primary focus areas identified in the Maine Community Foundation's recent strategic plan. To further these goals, the Foundation funded the University of Maine Center on Aging to launch the Encore Leadership Corp. Encore now has more than 160 older adult members representing all 16 Maine counties and 96 towns. These older Encore members have contributed more than 15,000 hours of service to improve the quality of life in their communities. Small grants to members have helped them monitor lakes for invasive plants, groom and maintain miles of free cross-country trails, revitalize downtown areas, start a new farmers' market, restore an old church steeple, and build a library.

- **Award one or two grants in aging that provide you an opportunity to learn about older adults.** By funding a few exploratory programs you can gradually build your knowledge and understanding of the field of aging. For example, the Plough Foundation funded the AdvantAge Initiative to help guide the Foundation's plans for grantmaking in aging.

To learn more about the needs of older people, the Plough Foundation funded the AdvantAge Initiative to survey older people in the Memphis, Tennessee area. This survey of older adults' opinions about their community's needs and opportunities serves as a guide as the Foundation determines what it will fund in aging. After contacting other foundations and people in the community knowledgeable about aging, staff identified seven areas for potential funding. The Foundation board's expanded interest in aging was influenced by a staff presentation of demographic information on older people in Memphis and in the U.S.

- **Create an entirely new grantmaking strategy related to older adults.** Assess the field of aging. Define your goals and strategies within the field. Set aside a specific amount of funds for these grants. For example, the Jewish Heritage Foundation of Greater Kansas City established a new funding initiative in aging.

Jewish Heritage Foundation of Greater Kansas City examined its grantmaking history and decided programs for older adults were underfunded. The Foundation joined Grantmakers in Aging to begin learning about the field. A staff member attended the annual conference of the American Society on Aging and learned about “aging in place,” which means adults grow older at home in their own communities. A consultant volunteered time to help develop a new initiative in aging. In 2006, staff brought to the board for its consideration information about older people in the local community and a proposed Older Adult Grantmaking Initiative. The board approved the new five-year Initiative, and an average of \$270,000 in grants was awarded each year to local nonprofits that promote independent living and the social and civic engagement of older adults. The Foundation continues to award grants for similar programs.

How to Get Started

Regardless of your approach, some or all of these actions may be useful as you begin to think about aging:

1.) Gather basic information about older adults

Older adults are a growing and influential population in most U.S. towns and cities. Why is aging an important issue in your community? To get a “lay of the land,” gather some basic demographic information about older adults, especially older people in your target community or region.

Consider a presentation to key decision-makers within your foundation. Create some simple charts with demographic information and show a video like this <http://www.youtube.com/watch?v=lvjafDYIRQA> .

Following are websites and organizations you might contact to prepare a brief demographic overview of older adults in the U.S. and in the communities of interest to your foundation.

- Visit the website of the federal Administration on Aging (AoA) http://www.aoa.gov/AoARoot/Aging_Statistics/index.aspx
- Use the website of the U.S. Census Bureau for your state, county, and city/town statistics <http://quickfacts.census.gov/qfd/index.html>
- Contact the planning agency at your municipal, county, or state government for more specific statistics about older adults
- Contact your state department on aging and ask where you can find information about older people in your community
- Ask your United Way for demographic information on older people in your community
- Contact your local Area Aging on Aging (AAA), which you can find by visiting the website of the National Association of Area Agencies on Aging (N4A) <http://www.n4a.org/about-n4a/?fa=aaa-title-VI>

In some communities statistical information is easy to obtain, while in other communities the information will be more limited. Include in your overview as much of this information as you are able to collect:

- Total population of your target community and the percentage of older adults
- The percentage change in older adults over the next 5 or 10 years and expected change in future years
- Number of older people in each of these age groups: 55 to 64, 65 to 74, 75 to 84, 85 plus. (The younger-old have different concerns, abilities and opportunities than older groups.)

- Number/percentage of older adults by race and ethnicity, since these groups may face unique challenges
- Number/percentage of older adults who live in poverty, which suggests challenges such as access to healthcare, dental care, vision or hearing aids, food, transportation, etc.
- Number/percentage of older adults who live alone, since isolation is a risk factor for health and wellbeing.
- Comparison of your community's demographics to county, state, or U.S. demographics to determine how your area is unique or special.

2.) Examine your foundation's history and style

Assess your foundation's grantmaking and history. Consider the core values and understandings that underpin your foundation's actions. This knowledge will lead you toward funding options in aging that are a good fit for your foundation.

Consider these questions:

- Does the foundation's history, its founder or descendants, suggest a particular focus for grants in aging?
- Does the foundation prefer to meet basic human needs with its grants? Or does it prefer to foster independence, participation and contributions by people? Or is there some other underlying value or style for grantmaking?
- Does your foundation fund capital projects, general operating costs, program support, one-time projects, or start-ups?
- What is the typical size of grants made by your foundation?
- Has your foundation made any grants that directly or tangentially relate to aging?
- Does your foundation have focus areas or patterns of interest in grantmaking that could be expanded to include older adults?
- How might the time and talents of trained older volunteers be used to enhance the results of current initiatives of your foundation?
- Are there specific organizations to which grants have been made that also serve older adults, and to which new grants might be directed?

3.) Identify and connect with local funders in aging

Determine whether any foundations in your community are significant funders of programs related to older adults. Your local United Way or larger nonprofit organizations that serve older adults may know of local foundations that are known for making grants in aging. Contact these grantmakers. Learn what they fund in aging and how they determined their interests. Ask them to identify other funders in aging, and then learn from them as well. Ask your funder colleagues to alert you to local educational meetings and events about aging.

In addition, these groups might help you identify funders in aging in your targeted community.

- Your regional association of grantmakers The website of the Forum of Regional Associations of Grantmakers will help you locate yours http://www.givingforum.org/s_forum/sec.asp?CID=575&DID=2625
- Grantmakers in Aging www.giaging.org or (703) 413-0413. GIA may know of grantmakers in your area that fund in aging.

4.) Explore the field of aging

As you examine your foundation's history, style, interests and preferences, some appropriate goals and strategies in aging might become immediately apparent. However, if not, you could explore several options and then narrow the possibilities for your grants related to older adults. Here are three potential perspectives on the field of aging that you and foundation decision-makers may wish to discuss and use to guide your planning.

Focus: Meet the needs of older people

At some point, older adults are likely to experience failing mental or physical health, however, that frailty may not be permanent. They may pass from being well to frail, and back again to independence and being well. Those living isolated, alone, and in poverty are at greatest risk, and the majority of those living in poverty are older women and people of color. Nearly half of the oldest old (those over 85) require assistance with daily activities like dressing, bathing, or eating.

A focus on these more frail and low-income older adults might include grants for

- Basic community services to promote safety and independence, for example, meals on wheels, transportation, and home adaptations to prevent falls
- Hearing aids, eyeglasses, dental care, not paid by Medicare
- Assistance for caregivers whose loved ones have limited physical and cognitive abilities
- Elder abuse and neglect
- Palliative care
- Adult day centers for older adults who require care during the day-time, but are able to live at home with help from relatives or friends
- End-of-life care
- Programs that enable people to age in place at home, safely and without isolation
- Long-term care at home or in an institution
- Study of gerontology and geriatrics to prepare professionals to work effectively with older people, such as scholarships and fellowships to local schools of social work, nursing, and medicine.

Learn from other foundations:

Archstone Foundation www.archstone.org, (elder abuse, end of life, fall prevention, aging in place)

Daniels Fund <http://www.danielsfund.org/Grants/Goals-Aging.asp> (in-home care, end of life care)

John A. Hartford Foundation www.jhartfound.org (social work, nursing, medicine)

The SCAN Foundation www.thescanfoundation.org (long-term care and services)

Harry and Jeanette Weinberg Foundation www.hjweinbergfoundation.org (basic needs, poor and frail elderly, caregiving)

Focus: Enrich the lives of older adults in your community

A full and enjoyable lifestyle includes opportunities for older adults to engage socially, to learn, and to stay healthy. These programs promote the well being of older people who are for the most part healthier and able. Many older adults will take advantage of educational courses at local colleges, libraries, and community centers. They will attend artistic programs, make educational excursions, create art or crafts, or participate in walking and other exercise groups.

A focus on a full and healthy life for older adults might include grants for

- Lifelong learning courses offered by community colleges and nonprofit organizations, in formats to accommodate different interests and abilities (on-site, telephone, and on-line)
- Workshops and seminars (on such topics as nutrition, chronic health conditions, Medicare, Social Security, retirement, safe driving, use of computers)

- Arts courses to teach older adults how to create performing, visual, and literary arts, held in libraries, senior housing, and community centers
- Special performances for mature audiences by local arts groups or schools
- Programs to teach older adults how to manage chronic illnesses like diabetes and arthritis
- Free or low-cost walking groups, tai chi, yoga, zumba dancing, or other exercise classes
- Social activities and structured programs that regularly connect people of all ages

Learn from other foundations:

The California Wellness Foundation www.calwellness.org (health promotion, wellness education, disease prevention)

MetLife Foundation <http://www.metlife.com/about/corporate-profile/citizenship/metlife-foundation/index.html> (healthy aging, access to the arts, arts education)

Winter Park Health Foundation <http://www.wphf.org/focus-areas/> (lifelong learning, promotion of healthy behaviors)

Focus: Engage older adults to help their neighbors and neighborhoods

About 90 to 95 percent of older adults are well and active and live independently at home. Every community has social, educational, environmental, and infrastructure challenges to address. The experience, time and talents of a community's older residents can be mutually beneficial to neighbors and neighborhoods that could use a helping hand, as well as to the older adults. Research shows that strong social connections and a sense of purpose are critical to older adults' good health and well being. Volunteer and paid jobs offer older adults a chance to respond to important community needs as well as connect with people of all ages.

A focus on older adults as assets to their communities might include grants for

- Tutoring by older adults for children in public schools and libraries, or for new immigrants
- Education or advocacy training for older adults who are raising grandchildren
- Older volunteers who bring meals or companionship to home-bound older people
- Clean-up and greening programs led by older adults to enhance community gardens and open spaces
- Older adult-led campaigns to address obesity, through community-wide walking groups for people of all ages, healthy eating and cooking demonstrations, and access to affordable nutritious foods
- Trained older volunteers to teach other older people about Medicare rights and benefits and how to navigate healthcare systems
- Exercise, health education or disease management programs led by older adults for their peers
- Programs that help older adults find volunteer or paid jobs
- Older adult-led neighborhood "aging in place" initiatives that coordinate services, programs, and events to help people age in place safely at home in the community
- Teams of people of all ages who assess community challenges and opportunities, design and implement a "communities for all ages" plan of action

Learn from other foundations:

Helen Andrus Benedict Foundation www.habf.org (mobilization of older adults into action to benefit their neighbors and neighborhoods)

Kenneth A. Picerne Foundation www.picernefoundation.org (experienced artists teach children)

Virginia G. Piper Charitable Trust <http://www.pipertrust.org/about-us/> (volunteering, "re-careering," community engagement)

5.) Consult the Experts

You will probably find it helpful to talk with experts in your community who can offer valuable perspective about the areas of aging of particular relevance to your foundation. Ideally your foundation's decision-makers will participate in these meetings, or you could organize a panel of three experts to meet with your full board or a board committee. Experts might include a college or university aging expert, another foundation active in aging, your Area Agency on Aging, or key larger nonprofits serving older adults.

You may also find these resources useful:

- A classic, the book entitled *Successful Aging*, by John W. Rowe, M.D. and Robert L. Kahn, Ph.D., summarizes 10 years of MacArthur Foundation-funded research about ways adults can enhance their mental and physical vitality in later life.
- EngAGEment issue briefs prepared by Grantmakers in Aging for foundations new to aging www.giaging.org
- Fact sheets prepared by National Council on the Aging <http://www.ncoa.org/press-room/fact-sheets/>
- *The Maturing of America: Communities Moving Forward for An Aging Population (June 2011)* by the National Association of Area Agencies on Aging http://www.n4a.org/files/MOA_FINAL_Rpt.pdf
- Reports and publications by MetLife Mature Market Institute <http://www.metlife.com/mmi/index.html>
- Webinars or regional or national conferences sponsored by
Grantmakers in Aging www.giaging.org
American Society on Aging www.asaging.org
National Council on Aging www.ncoa.org
- Educational programs or publications of aging-related associations relevant to the specific topics of interest to your foundation

Other options include:

- Join Grantmakers in Aging, and request a mentor www.giaging.org
- Engage a consultant experienced in grantmaking and aging to help you determine how your foundation can best award grants related to older people. A directory of consultants to grantmakers can be found at the website of National Network of Consultants to Grantmakers www.nncg.org

6.) Engage and educate your foundation's decision-makers

To assure success with your grants in aging, most likely you will want to engage key decision-makers for your foundation throughout your exploratory process. Which individuals or committees within your foundation can best assist you as you figure out how to approach aging? Or perhaps your entire board can provide the guidance needed. These decision-makers will want to know why funding of older adults is important and relevant to your foundation and your community. Ideally they should be involved at every key stage of planning and decision-making so as to encourage their ability to shape and "buy into" any new approach, focus and strategies adopted by the foundation.