

Changing Your Grantmaking Lens: Aging as an Asset

by Jason C. Born

Do you view older adults in your community as a valuable and perhaps untapped asset... or as a population in need of increased philanthropic support? Based on interviews with family funders active in this important, complex and diverse funding area, the answer is a little bit of both, but more of the former than you might think.

A variety of demographic trends have led policy experts to predict that America's aging population will be the single greatest pressure point on public financing for decades to come. All funders, regardless of their grantmaking mission or geographic focus, would be wise to begin adjusting their strategies to a changing society with a rapidly expanding component of older adults. Carol A.

Farquhar, executive director emeritus of Grantmakers In Aging (GIA), puts it this way: "Regardless of your funding interests, whether it's the arts, environ-

ment, health, neighborhood, social services, education, or children, youth and families, older adults are increasingly relevant to your work."



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THE GRAYING OF AMERICA

“[aging] is not a short-term issue; the changing demographics caused by America’s rapidly aging population will be with us for decades to come; hence, our interest in trying to make sure that foundations understand the impact it will have on our communities.”

– Mary Ellen Kullman, Chair, Board of Directors, Grantmakers In Aging

As of January 1, 2011, the oldest of the baby boomers reached retirement age. From that day forward, **10,000 people each day will turn 65 years of age**, and this will continue for many years. Someone in the U.S. will turn 65 every 20 seconds.

Since 1970, the **number of people over the age of 65 has increased by 80 percent**.

By mid-century, for the first time in human history, **the number of people over 60 will outnumber children under the age of 14**.

In the U.S., persons reaching age 65 currently have an average added life expectancy of between 18 and 19 years. In testimony to the Senate Select Committee on Aging, it was stated that **50 percent of female babies born today would live to be 100 years of age**.

About one in eight Americans are age 65 or above today, compared with one in 10 in the 1950s. **By 2030, one in five Americans will be 65 or older**, roughly the same as Florida population today. The number of people age 65 or older will nearly double between 2000 and 2030.

Americans are living longer. In 1950, life expectancy for males at age 65 was 12.6 years and 14.4 years for females. By 2000, life expectancy at age 65 had risen to 15.9 years for males and 19.0 for females. **By 2030, it’s projected that life expectancy at age 65 will rise to 18.0 for males and 22.00 for females**.

Thanks to improving longevity, there will be about **six million Americans age 85 or older in 2010—twice as many as in 1990**.

In 2031, when the baby boomers begin reaching 85, the number of oldest old will begin rising rapidly, growing to an estimated 21 million by 2050.

More than 4 million grandchildren live with their grandparents.

As America ages, the ratio of workers to retirees will continue to fall. In 1970, there were almost four (3.7) workers for every Social Security beneficiary. **Today there are just over three (3.3) workers for every beneficiary**. By 2030 there will be just over two (2.2).

Source: Grantmakers In Aging and The Aging of America – Key Facts & Trends

PART I: AGING AS THE SOLUTION... NOT THE PROBLEM

“Many funders think primarily in terms of the needs of older adults as opposed to their role as assets for their community,” says Barbara R. Greenberg, president of The Philanthropic Group and foundation advisor to the Helen Andrus Benedict Foundation. “The Benedict Foundation feels strongly that older adults are an important part of the solution, rather than just another problem.”

“Today’s older adult population is better educated, in better health, and more financially secure than at any time in history,” says Farquhar. “Older Americans are a diverse group, aging at different rates. We have a variety of educational backgrounds, employment backgrounds, and cultural backgrounds.



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The aging population is represented in every economic graph; 60 percent of those 65-plus are women and 17 percent are people of color. Many live alone. Many lack financial security, and many are retiring earlier now but may continue to work mostly to stay connected. But certainly during these economic times there is a financial need as well.”

Farquhar maintains that American’s growing aging population offers a nearly limitless supply of ready and able volunteers, mentors, activists, and community leaders.

“The aging of America’s society is almost always seen as a problem, but the elderly may be our only growing natural resource, provided we create new ways to mobilize their civic energy.”

—Marc Freedman, Founder and CEO, Civic Ventures

“Older adults are powerful assets. More than 90 percent of older adults are active, well, and living in the community. They have lifelong connections. They have experience. They have wisdom and skills to contribute. Many are already helping. They are volunteering their time—nationwide, 60 to 70 percent of older adults participate in formal or informal volunteer activities. They’re providing care to spouses, to partners, to other family members and children. If we support and promote older adults’ health and well-being, their participation in turn encourages the stability and economic viability of families, neighborhoods, and communities. We need to see older adults as community problem solvers, as active in town and city government, as volunteers for cultural organizations.”

Greenberg agrees. “There are so many ways for funders to approach aging. If you have an interest in higher education you can fund scholarships for people who want to prepare themselves to work effectively with older adults. If you have an interest in the environment, you can focus on food deserts and programs that engage older adults in helping to start farmers markets and to enhance the ability of community gardeners to raise more food. You can take just about any topic you want and include older adults as the doers or as the recipients, according to your interests.”

A POWERFUL FORCE

“No other force is likely to shape the future of national economic health, public finances and policy making as the irreversible rate at which the world’s population is aging.”

— Analysts at *Standard & Poor’s*, writing in *Standard & Poor’s Global Aging 2010 Report*

On the other hand, many economists view the exploding population of 70- and 80-somethings not as an asset, but as a looming budget crisis. By one estimate, treating dementia worldwide already costs more than \$600 billion annually.

And, particularly in these times, very few states (or countries) are in a position to provide all that is needed for those older adults with the most significant needs.

“Many funders believe that senior needs are being met by the government,” says Pam Velo, assistant vice president for donor services at the Central Indiana Community Foundation, which manages a \$14 million donor-advised fund created for the aged. “The truth is that while Medicare and Social Security benefits are crucial, the incidence of poverty and the number of seniors unable to care for themselves for physical and/or mental reasons are growing each year. Government funding in almost every area has been flat-lined, and the proposed budget is holding that line. When the over 65 population is burgeoning, and the need is becoming greater, flat-lined funding is tantamount to cuts. Which is why advocacy in this area is so critical.”

Velo suggests that there are many good programs available for family philanthropies seeking to provide support for the 5 to 10 percent of the older adult population that are typically classified as being sick, frail or needy. “Smaller funds can provide scholarship dollars for adult day care, assist in printing brochures for organizations trying to reach the elderly or just increase awareness about the issues facing seniors. You can help your neighborhood community center pay for transportation to senior programs, help neighborhood clinics pay for prescription drugs to help seniors keep chronic conditions under control, or fund any project that helps seniors stay in their homes instead of a nursing home. The opportunities are almost endless.”

Trent Stamp, executive director of the Eisner Foundation, agrees. “I think the field is wide open,



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with a ton of room for thoughtful and impact-seeking family foundations to step in. We’ve chosen to focus on intergenerational solutions to society’s largest problems, but that only leaves about 5,000 other interesting opportunities in the field of aging for others to claim. The need exceeds the funding in this arena exponentially.”

The good news is that a growing number of family foundations and donor advised funds around the country are finding that supporting programs for the elderly hits at the heart of their shared philanthropic goals. Grantmakers In Aging, the national affinity group for funders with an interest in aging, has grown from around 60 organizations in 2000 to more than 135 today, and a growing number of its members represent family foundations or donor advised funds.

“This is not an impersonal experience for families,” explains Rob Mayer, president of the Hulda B. and Maurice L. Rothschild Foundation and grand nephew of the foundation’s founder. “It’s a very, very personal effort. As families look to answer the question, ‘where do we engage in this incredibly broad and diverse area of aging?’ I think a good place to start is to ask yourselves where our passions are as a family; what matters to us? It might be that Cousin Esther had Alzheimer’s. It might be that Uncle Max had a bad experience in a long-term care community. Mom has had difficulty navigating the healthcare system. I always encourage families to start there, because unless your philanthropy touches the personal passions of your family, over time, family members will fall away and pursue their own interests.”

PART II: AGING AS AN ASSET - FAMILY FOUNDATION PROFILES

Increasingly, smaller family foundations and advised funds from around the country are playing leadership roles in their communities in the area of aging.

“There are a number of ways that a small, local funder can make a significant difference,” says Rob Mayer, President of The Hulda B. and Maurice L. Rothschild Foundation in Chicago. “A local funder can convene other local funders and get people with vested interests in your community to collaborate around a commonly understood challenge. But don’t limit your vision to the boundaries of your own community. As a local funder you may underestimate the potential power that you have to make a difference in a broader geographic area.”

Part II of this special edition of *Passages* presents profiles of several family philanthropies whose personal passions have led them to innovative approaches to serving—and benefiting from—America’s aging population.

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A Small Family Philanthropy Making a Big Impact: The Hulda B. and Maurice L. Rothschild Foundation:

The Hulda B. and Maurice L. Rothschild Foundation recently celebrated its first decade of improving quality-of-life for elders and long-term care throughout the United States.

The Rothschild Foundation was awarded the 2009 Critical Impact Award for Family Foundations from the Council on Foundations, for its success in reaching its goal of helping transform the culture of aging in nursing homes throughout the U.S. by shifting the focus from institution-based to resident-centered, bringing hope to community elders and improving their quality of life through a relatively small, but highly focused program of sustained strategic grantmaking.



Rob Mayer, president of the foundation and grand nephew of its founder, shared the remarkable story of the foundation’s evolution as a grantmaker on a recent teleconference presented by the

National Center for Family Philanthropy:

“We began as a local community organization. We were just a small local funder. I’m not a gerontologist. I’m not a geriatrician. I’m not trained in elder care in any way, shape, or form, nor are any of our other trustees or associates. We just inherited a foundation that wanted to do something for elders and so we began benignly by buying discount tickets to cultural events for elders in the Chicago area. We quickly discovered that we weren’t serving underserved elders because the elders who were going to the symphony and the opera were very ambulatory and had discretionary income. So we started asking, ‘where are the underserved?’

“And the answer we found over time was, well, they’re in nursing homes. That’s where we put them away, out of sight and out of mind.

“So, we began to fund a performing arts program in Chicago-area nursing homes. Over time we built that program to 1,000 performances a year. We thought we were doing pretty cool stuff. Everybody came up to us and said, ‘wow, we saw the dance group you funded. We saw the singers. We saw the improv group you funded, they were so wonderful.’ But we kept asking ourselves, ‘are we making a difference?’ and what we realized was for perhaps 45 minutes a week we were making a difference, but what was happening the rest of the time in those nursing homes? Same old, same old.

“So the question was not just, how can we provide respite for 45 minutes; our question was how do we change a culture 24/7, how do we change an industry? And we discovered that in our geographical area, change wasn’t happening. There wasn’t a lot of interest in long-term care change in the Midwest. So we had a choice to make. We could pick a different focus for our philanthropy or we could broaden our geography and say, okay, we’re not going to just

focus on Chicago or the Midwest. We're going to become national in scope, and we're going to begin to change this industry elsewhere around the country where opportunities exist, with the hope that eventually those changes will land back in the Midwest.

"So that's how we moved from a local community funder to a national funder. As with our geographic focus, our programmatic strategies went through many changes, as well. Over time, by constantly asking where the fulcrums of change are, because it's a difficult industry, we tried lots of strategies, recognition, media, advocacy, research, capacity building. We finally landed on, interestingly enough, regulation.

"Again, regulation is something I know nothing about. But we believe in listening very carefully to those we serve. Every time we asked our important stakeholders, 'what's the barrier to change?' the answer came back, 'It's regulatory. The darn regulations won't let us improve quality of life, this, that or the other thing.'

"As a result, we have now begun to focus about 80 percent of our grantmaking on re-regulating this highly over-regulated industry, because what we can understand is that in this field, in this industry as with much of healthcare in our country, it's organized and managed based upon myriads of regulations. So if you want a change in this industry, it's not about changing attitudes, it's not about changing behaviors, it's about changing the regulations.

"When we first approached people and said, 'We want to make regulations more supportive of quality of life for our elders,' of course they all said, 'You can't change the regulations. You know, only the regulators have the power to do that.' We said, 'we're just dumb enough to think that we can engage with the regulatory community and begin to re-regulate this industry.'

"And for the last ten years that's what we've been doing."

[Note: Readers with access to the National Center's Family Philanthropy Online Knowledge Center may access the [full recording and transcript of this presentation here.](#)]

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Donor's Passion Leads to Foundation's Focus on Aging: Helen Bader Foundation

The Helen Bader Foundation's [Alzheimer's and Aging](#) program area seeks to make Wisconsin a leader in developing innovative solutions for the challenges posed by Alzheimer's disease, as well as in how Americans view growing older and the later stages of life.

Through an emphasis on program development, applied research, and public policy, the foundation aims to offer hope to families grappling with Alzheimer's. The foundation works with partners of all sizes in the fight against the disease, and supports and plays a role in statewide initiatives and inter-agency collaborations it feels are key to addressing the issues that affect older adults and their families.

To date, Alzheimer's and Aging has been the Bader Foundation's largest single giving area, with more than \$35 million in related grants out of more than \$200 million total grantmaking.

The foundation's interest in Alzheimer's and aging is a "very clear path for the foundation," says Daniel Bader, president and son of its namesake and founder. "My mom was a social worker, and for the last 10 years of her life—at a time when the name Alzheimer's came into play—she began working closely with people with dementia and trying to find specific activities for them. She was heavily involved at a critical time, and she was very interested in how you develop programming for this population. She started working with music, dance, and arts therapy, and later funded research at University of Wisconsin-Madison."



“When we started the foundation in the early 90s, it was clear to us that a principal thing we wanted to do was to continue her work in the field of aging and specifically her work with patients with Alzheimer’s and dementia. Those were very clear paths for us—one of the first areas of interest at the foundation.”

“As the field of aging has developed, our programming has changed significantly,” explains Bader. “When we started, the support network for families was minimal, and there were no research centers. So what we really started with in the 1990s was building up networks of individual experts. Today there is a much stronger network—for doctors, patients, and families. And it took about a decade to build all of that.”

While Alzheimer’s and Aging is one of four distinct grantmaking programs at the foundation, Bader explains that all of the program areas have natural and strategic overlap.



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“All of our program areas are a direct reflection of my mom’s values and interests. One of the biggest interests my mom had was in the arts. We have a separate arts funding program, but within Alzheimer’s and Aging we also fund the arts. We actually have a mission/directive from the board to try and get every program area to dedicate 10 percent of its budget towards programs that support the arts. We fund heavily in the Jewish Community, and have invested fairly heavily in Jewish Continuum of Care facilities. We also have a Program Related Investment fund that scans across all of our program areas and have funded a number of projects using program related investments that are working with the elderly.”

[Listen to the National Center’s interview with Dan Bader to hear more about the Helen Bader Foundation’s lessons learned in Alzheimer’s and Aging.](#)

Creating Aging-Friendly Neighborhoods: The Helen Andrus Benedict Foundation

The Helen Andrus Benedict Foundation was created in 1997 in memory of John E. Andrus to enhance the Andrus family’s longstanding commitment to Westchester County, New York. The Benedict Foundation’s mission is to create aging-friendly neighborhoods and actively engage older people in their communities, with special attention to the City of Yonkers in Westchester County, New York.



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Barbara R. Greenberg, advisor to the foundation, explains that “The history of the Andrus Family has very much influenced the work we do. Helen Andrus Benedict was a dedicated volunteer who took her responsibilities seriously, a role model for an active older adult. In addition, our intergenerational approach to grantmaking is directly related to the words of her father, John E. Andrus, who expressed the wish to provide “opportunity for youth and rest for old age.”

Greenberg explains that the foundation’s grants are focused on a framework of “positive aging,” an approach emphasizing the many and diverse assets older adults bring to their communities. “Older adults in our communities have time, talent and experience that can be used to benefit children and youth, and people of all ages,” explains Greenberg. “There are so many opportunities for our grantmaking—from older adult tutors in schools who help improve children’s reading skills, to groups of grandparents who advocate for better programs and supports for all grandparents raising grandchildren.”

Greenberg says that one of the biggest challenges facing the foundation's work is a continuing perception that "all older adults are poor, sick, frail, and needy." She notes that "vulnerable older people are, of course, of concern for all of us. However, the vast majority of older adults are relatively well, active and living in the community, though they may be juggling several chronic diseases. They represent about 90 percent of our adult population. Our challenge is to stay focused on the ways we can help that 90 percent have a good quality of life, living safely in their homes in the community for as long as possible. That's where the Benedict Foundation has focused its energy—on the 90 percent."

"There are so many opportunities for our grantmaking—from older adult tutors in schools who help improve children's reading skills, to groups of grandparents who advocate for better programs and supports for all grandparents raising grandchildren."

Greenberg explains that "We know through research that social connections and a sense of purpose are really critical to older adults maintaining their health and sense of well-being. Older people are for the most part valuable assets to their communities. The truth is that older adults can be part of the solution, and not the problem, and keeping older people active and engaged in their communities will actually minimize the help they need over the long run."

Regardless of your approach, Greenberg says, aging is an area ripe for exploration by foundations and funds of all sizes. "The exciting thing about aging

A Vision for Yonkers

In April 2006, the Benedict Foundation gathered its grantees and a variety of other key stakeholders in the Yonkers community to develop a shared "Vision for Yonkers" to help guide future grantmaking by the foundation. This Vision included an overarching theme, as well as five goals for how the city of Yonkers will embrace its older adult population:

Yonkers is a community for all ages—a great place to grow old. Yonkers is the (un)retirement capital of the world.

- Older people are aware of all the ways they can participate in Yonkers.
- Older adults are the life-blood of Yonkers. Their experience is sought out and valued.
- Yonkers' older residents are neighborhood "movers and shakers."
- Yonkers' residents stay connected. They can grow old at home in the community.
- Yonkers is a model for the region and the nation.

Listen to the National Center's [interview with Barbara R. Greenberg](#) to hear more about the Benedict Foundation's lessons learned in "positive aging."

is that it is almost a pioneering field at this point. There are so many opportunities, depending on your interests. Many family funders are place-based and locally focused. If a foundation is interested in a particular community where the family lives or used to live, consider intergenerational approaches that might fit well with a general concern for people of all ages as well as the whole community."

"You can take just about any topic you want and include older adults as the doers or as the recipients, according to your interests."

Voices from the Field: Small Grants, Big Impact

Jeniam Foundation, Newtown, CT

“As a small family foundation, we are looking for ways to ‘add-value’ on an incremental basis within a major national issue. Working with local providers has been a good match. For example, we have been lead provider for some 50+ computerized tele-health home units at Visiting Nurse and Hospice of Fairfield County. We have also funded a Care-Tracker program at Waveny Care Network, as well as providing needed health equipment that cannot wait on the longer grant cycles of larger funders.”

—Tripp Killin, Executive Director

Dean & Margaret Leshar Foundation, Walnut Creek, CA

“The Leshar Foundation has focused our seniors funding towards “aging in place” programs. Keeping seniors in their homes and communities as long as possible is beneficial for their mental health and their physical well-being, and is more cost efficient. To that end, we fund Meals on Wheels, a daily telephone check-in program for the frail and isolated elderly, a program providing drivers to take seniors to appointments and on errands, a program using retired social workers to assess living and cognitive skills, and a project to make homes more “senior friendly” by installing ramps, handrails, and non-slip surfaces. In addition, we fund a specific program at our local food bank that distributes fresh fruits and vegetables to seniors who are not able to frequent the local farmer’s markets.”

—Kathleen Odne, Executive Director

Helen Bader Foundation, Inc., Milwaukee, WI

“As the field of aging has developed, our programming has changed significantly. When we started, the support network for families was minimal, and there were no research centers. So what we really started with in the 1990s was building up networks of individual experts. Today there is a much stronger network—for doctors, patients, and families. And it took about a decade to build all of that.”

—Daniel Bader, President

The Jean and Louis Dreyfus Foundation, New York, NY

“Established in 1979, the Jean and Louis Dreyfus Foundation has supported work in the field of aging since its inception, giving priority to those organizations that spearhead systemic change as well as those that provide direct services to the frail elderly in New York City. The Foundation seeks to address emergent needs and bring innovation to the field. Noteworthy programs include the Weill Cornell Medical Center and its pioneering work in geriatric medicine, and Caregiver Support programs of Beth Israel and Mount Sinai Hospitals.”

—Jessica Keuskamp, Program Director

Spurring Innovation and Excellence in Intergenerational Programs: The Eisner Foundation

The [Eisner Foundation](#) was started in 1996 by Michael D. Eisner, then-chairman and CEO of The Walt Disney Company, and his wife Jane to focus their family's philanthropic activities. The Eisner Foundation gives roughly \$7.5 million per year to non-profit organizations exclusively in Los Angeles County.

In October 2010, the foundation launched [The Eisner Prize For Excellence in Intergenerational Work](#), a cash award of \$100,000 designed to recognize excellence by individuals or non-profits working with multiple generations, especially seniors and youth, to bring about positive and lasting changes in their community. In October 2011, the foundation announced that the Intergenerational Center at Temple University was selected to receive the inaugural \$100,000 prize in recognition of its comprehensive and wide-ranging efforts to unite multiple generations—especially seniors and youth—to bring about positive, lasting changes in communities across Philadelphia and beyond.

“Our foundation has been focused for several years on identifying and rewarding non-profit organizations that work with at-risk seniors or youth in Los Angeles,” said Eisner, in announcing the prize. “We now seek to go a step further, by spurring innovation and excellence nationwide among individuals and groups in working not just with one or the other of these demographic groups, but with both at the same time.”

The Eisner Prize is a national award, open to anyone or any group working in the United States. The board and staff of the foundation hope to be able to replicate in Los Angeles the program of the award winner. If the winner resides in Los Angeles, the board may choose to fund an expansion of the currently-existing program or idea.

“Historically, we were only focused on children, but we added the senior focus two years ago,” says Trent Stamp, executive director of the foundation. “We actively seek overlap between the two funding areas, and created the Eisner Prize as a way of identifying and rewarding those that work effectively with both populations simultaneously.”



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Stamp says that while there are great programs for the elderly out there, many more are needed—and soon. “I think funders don’t often see the opportunity for impact that they do in other sectors. It’s easy intellectually to understand that investing in children can lead to not only benefits for society, but for long-term benefits for that particular child, given that his whole life is ahead of him. With seniors, I think a lot of funders shy away from serious investment because they don’t see that potential for long-term impact on the particular person. So as a result, we see a lot of programs that act in a palliative, not rehabilitative, nature. But this is short-sighted. Our population is graying faster than our economy will ever be able to support. We must invest in seniors and find innovative solutions that will generate positive impacts for the population as a whole moving forward.”

Supporting Start Ups and New Approaches to Aging: The Harry G. and Charlotte H. Slater Family Fund

Since its establishment in 1995, The Harry G. and Charlotte H. Slater Family Fund of the Greater Milwaukee Foundation has used small grants and the personal passion of its family advisors to play a catalytic role in support of a broad spectrum of start-up programs focused on aging, end-of-life and palliative care.

“My father, Harry G. Slater, an attorney, served on the City of Milwaukee Pension Board and was always very concerned with what happened to people after they retired,” explains Marcia Slater Johnston, who serves as one of two family advisors to the Fund, along with her husband Roger B. Johnston. “He did

a variety of Pro Bono legal work with seniors, and in the early 1970s he was appointed to a Governor's commission in Wisconsin that was looking at a new program to have meals delivered to private homes—the program later became Meals on Wheels.”

Slater Johnston explains that the family's interest in aging issues was further sharpened when her husband was appointed by Mayor Richard M. Daley to the Chicago Advisory Council on Aging, which provides guidance to the city's Department On Aging. “My husband became very, very interested and impressed with what you could do for older adults with modest sums of money.”

After both of her parents died in hospice care, Slater Johnston and her husband decided to add end-of-life and palliative care as specific components of their overall aging agenda.

“While we've never looked at our grantmaking over a five- or ten-year horizon, one important long-term strategy decision we've made is to, if possible, only fund start-up programs. As a small fund that gives modest grants, we're looking for ways to really leverage our dollars. We find that seed grants to start a program or expand an existing program in a different direction can be a really good way of achieving that goal.”

Slater Johnston says that the fund's flexibility has been a great advantage, particularly given its definition of aging. “Aging for us means over 50, so when we're looking at aging, we're looking at the period of someone's life that could possibly last half a century.

“Aging really touches everything,” Slater Johnston says. “No matter what your foundation's focus is, you can find a way to incorporate funding programs for older adults into your grantmaking.

“If your foundation primarily funds children, you can fund an intergenerational program that brings older adults and kids together in some sort of program—whether it's one that blends a child day care center with an adult day care center, or funds high school students who come in to nursing homes and create family histories for residents. There's a whole variety of things you can do to combine interests. If you fund in education, you can fund a retraining program for those in mid-life (50s, 60s) who are downsized out

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of jobs, or a learning-in-retirement program. If you fund the environment, you could look at a project to provide green space in a city high rise complex for low-income seniors where none exists.”

Slater Johnston credits the fund's status as a donor-advised fund of the Greater Milwaukee Foundation as being key to its success. “The foundation staff has been very supportive of our funding in aging and has encouraged our decision to provide seed grants from the Fund,” Slater Johnston says. “We've got a great collaborative relationship. Roger and I pass along to the foundation those grant proposals we think are a good fit with the fund, and the foundation staff turns thumbs up—or thumbs down—on funding the projects. I'm happy to say that during our 16-year tenure as donor advisors, every grant from the fund we've recommended has been approved.”

Slater Johnston also points out an important side benefit of the relationship between the donor advisors and the community foundation. “The Harry G. and Charlotte H. Slater Family Fund was endowed to last in perpetuity as an advised fund of the Greater Milwaukee Foundation,” she says. “Long after Roger and I are no longer living, the fund will still be making grants to aging programs in Milwaukee. We hope that we will establish over the years a significant track record in funding aging programs. And when we're gone, we hope the foundation staff will say, ‘well, this is the kind of aging program the donor advisors supported,’ and make grants from the fund accordingly.”

An Eclectic Menu of Grants: The Harry G. and Charlotte H. Slater Family Fund

Through the years, The Harry G. and Charlotte H. Slater Family Fund's seed grants have supported an eclectic menu of initiatives for older adults, such as a hospital-based support group primarily for patients over fifty coping with cancer; a movement and dance therapy regimen for both healthy and frail residents of a continuing care retirement community; and a presentation on mental health issues of the elderly, geared for geriatric healthcare professionals.

Slater Family Fund grants also have provided backing for endeavors offering assistance to low-income seniors. "A grant from the Slater Family Fund to S.E.T Ministry, a faith-based nonprofit, paved the way for the creation of the 'Buzz Club'—a new social club in a City of Milwaukee Housing Authority apartment complex," Slater Johnston says. "The Buzz Club was formed to provide elderly residents with companionship and recreation as an antidote to the isolation and loneliness that sometimes accompanies aging."

Another Slater Family Fund grant to improve the quality of life for low-income senior citizens was given to the Arthritis Foundation, Wisconsin Chapter for a pilot program called the Elder Health Upholder Arthritis Education Project. Elder Health Upholders is a coalition of church and community leaders providing a faith-based approach to improving the health of African-American older adults in Milwaukee.

"The Arthritis Education Project trained volunteer lay health educators to teach arthritis patients how to manage their disease," Slater Johnston explains. "After the volunteer educators completed their training, they presented health education programs teaching arthritis self-management skills to elderly parishioners in five inner city churches—each representing a different faith. More than 200 elderly arthritis patients attended these programs."

"At the conclusion of the Slater Family Fund grant period, the Healthier Wisconsin Partnership awarded a three-year grant to continue—and expand—the project."

One of the more innovative programs supported by the Slater Family Fund was a pilot project in the Medical College of Wisconsin's Humanities Department. The project was designed to increase medical students' empathy with older adults—a major demographic group in examining rooms—by giving medical students a chance to engage with them as peers outside of a clinical setting.



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"This project paired ten med students one-on-one with ten residents of a retirement community," Slater Johnston says. "Each student and resident pair met at the retirement community and exchanged life stories. Then, with the assistance of an art instructor, each med student and each resident created an acrylic painting symbolizing a meaningful aspect of his or her partner's life."

"All the artwork was displayed during a celebratory dinner for participants in the retirement community's private dining room. The life stories that inspired the paintings were shared with the group. After dinner, the residents took their med student partners on a tour of the retirement community and invited them to wrap up the evening with visits to their apartments."

Slater Johnston says that post-project evaluations showed that the medical students developed a good rapport with the older adults and had bonded with them. "Even after the project ended, several med students continued to drop by and chat with their new elderly pals," she says. "One medical student wrote on the evaluation, 'I thought the program was a good way to introduce people to the geriatric population. I made a great connection with my partner.'"

WORKSHEET: YOUR FOUNDATION DOESN'T FUND IN AGING? THINK AGAIN...

Unlimited opportunities available for family funders looking to make a difference in the field of aging.

Over the past several years, Grantmakers In Aging (GIA) has identified 12 primary funding areas in the field of aging through membership surveys and discussion groups. Within each of the 12 core areas they've identified five to 10 subcategories. "Within each of these areas are wonderful examples of innovative and replicable models for foundation funding," says Carol A. Farquar, executive director emeritus for GIA. "For smaller family foundations, many of the national initiatives can be brought to a community for a very modest investment. There are opportunities to capitalize and leverage national involvement in many areas."

Complete the following worksheet to prepare for a future conversation on how aging issues play a role in your grant-making. In Part I, simply put a check by those issues you currently fund. In Part II, brainstorm with local resources and ask specific questions about concerns you need answered as you seek to make aging a more targeted part of your portfolio.

ID	Name	Yes/No?
1	COMMUNITY AND SUPPORTIVE SERVICES	
	TRANSPORTATION	
	ACCESS TO SERVICES	
	CIVIC ENGAGEMENT	
	ARTS AND CREATIVITY	
	FAITH-BASED SERVICES	
	DISASTER RELIEF	
	RURAL SERVICES	
	ENVIRONMENTAL ISSUES	
	LEGAL SERVICES	
2	ECONOMICS	
	RETIREMENT INCOME	
	SOCIAL SECURITY	
	HEALTH SERVICE COSTS	
	MONEY MANAGEMENT	
	ECONOMICALLY DISADVANTAGED	
	RETIREMENT PROGRAMS	
	STIPENDARY	
3	HEALTH	
	ALZHEIMER'S OR DEMENTIA	
	MENTAL HEALTH	
	CHRONIC ILLNESSES	
	DISABILITIES	
	HEALTHY AGING	
	FOOD AND NUTRITION	
	NURSING	
	WELLNESS/PREVENTIVE CARE	
	PALLIATIVE CARE	
4	HOUSING	
	HOME MODIFICATION	
	AGING IN PLACE	
	ASSISTED LIVING	
	NURSING HOMES	
	RETIREMENT COMMUNITIES	

ID	Name	Yes/No?
5	SAFETY	
	MONITORING SERVICES	
	ABUSE and NEGLECT	
	FALL PREVENTION	
6	INTERGENERATIONAL	
7	PUBLIC POLICY	
	MEDICARE	
	MEDICAID	
	HEALTH CARE REFORM	
	CIVIL RIGHTS	
	EX-OFFENDERS	
	ADVOCACY	
8	CAREGIVING	
	ADULT DAYCARE	
	COMMUNITY BASED CAREGIVING	
	HOME BASED CAREGIVING	
	CAREGIVER RESPITE	
9	LONGTERM CARE	
	TRANSITIONAL CARE	
10	TECHNOLOGY	
	HOME MONITORING	
	TELEHEALTH	
11	EDUCATION AND TRAINING	
	WORKFORCE DEVELOPMENT	
	SCIENCE AND RESEARCH	
	STATISTICS	
	GERONTOLOGY	
	LIFELONG LEARNING	
12	DIVERSITY	
	IMMIGRANTS AND REFUGEES	
	LESBIAN, GAY, BISEXUAL, TRANSGENDER (LGBT)	
	MINORITY POPULATIONS	

ADDITIONAL RESOURCES FOR LEARNING MORE

A great benefit of the Internet age is the ease with which anyone can find good information about any topic at the click of the button. Still, family funders active in aging suggest that the best way to learn about this issue is to schedule a visit with one or more of your local service providers, and to complement this in-person experience with personal conversations with both local and national funders and experts.

“One of the most powerful resources for new funders is to go and find a local adult daycare program or activity program and just visit it, without any immediate plan to provide support,” says Dan Bader, president and trustee of the Helen Bader Foundation. “Learn what it’s like to work with Alzheimer’s patients. It’s a different world, with different challenges, and you can really learn a lot through one of these visits.”

Bader adds that the Bader Foundation enjoys sharing what it has learned with other funders interested in this topic. “In every community there are likely to be great programs. If you are a smaller foundation, fund or individual donor interested in learning which local programs are the most effective, most larger foundations with dedicated staff are very happy to pick up the phone and share their experience. The Bader Foundation, for instance, has staff that spend all day in the community—they have a lot of experience in the community, and they can also connect people to other resources and individuals with that experience.”

Another great resource for both new and experienced funders in the field of aging is GIA’s EngAGEMENT Initiative. Through EngAGEMENT, GIA partners with regional associations of grantmakers, affinity groups, and other national organizations to introduce grantmakers to the growing needs of the aging population and how philanthropy will be affected. The EngAGEMENT Initiative has developed a series of [six informative Issue Briefs](#) to introduce funders to the many issues surrounding aging. Each brief is designed to

give an overview of the subject, statistics, charts, links and funding opportunities. Together, these briefs form a fundamental resource for any funder interested in aging.

Other resources suggested by those interviewed for this issue paper include:

- [ChangingAging.Org](#)
- [Civic Ventures](#)
- [Funder Stories on Palliative Care Grantmaking](#)
- [Healthy Aging](#)
- [Healthy Aging: Over 50](#), by the Mayo Clinic
- [Area Agency on Aging](#) (list)
- [The MetLife Report on Aging in Place 2.0: Rethinking Solutions to the Home Care Challenge](#)
- [National Council on Aging](#)
- [Senior Health Care](#)

NEXT STEPS

This special edition of *Passages* provides a brief overview of the many opportunities available for family funders seeking to make a difference in the field of aging. Here are several quick suggestions for possible next steps in moving forward to make aging a core part of your family’s philanthropic mission:

- Review the “Think Again!” worksheet on page 13 and put a check mark next to those areas in which your family current funds; share this list with members of your board and staff to help them understand that aging is already an important part of your “giving portfolio.” (Better yet, ask them each to review and complete the worksheet on their own!)
- Review the EngAGEMENT Initiative’s series of [six Issue Briefs](#) to learn more about the demographics of our country’s aging population, as well as possible strategies for deeper investment in the areas of intergenerational programming, aging in place, health, and end of life/palliative care efforts.
- Schedule visits with local service providers and contact your local [Local Area Agency on Aging](#)

to learn more about critical issues in your city, state or region.

- Talk with family funders active in the field of aging to learn more about their experiences, and options for replicating successful grant-making approaches in your community. For contact information of families interviewed for this paper, contact staff at the National Center
- Schedule a board/staff discussion to explore potential strategies and initiatives in the field of aging. For additional suggestions on how to structure this meeting, contact Grantmakers In Aging at www.GIAging.org or 937.435.3156.



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WE WELCOME YOUR COMMENTS.

The National Center for Family Philanthropy, a nonprofit 501(c)(3) organization, is the only nonprofit resource dedicated exclusively to giving families and those who work with them. If you have comments, questions or suggestions for a future edition of *Passages*, contact: ncfp@ncfp.org.