CfaL Roles for Philanthropy

81 MILLION

Number of U.S. Baby Boomers

$650 MILLION

Grant dollars invested nationwide in community improvement/ development

4%

Percentage of Indiana foundations funding aging issues

94%

Percentage of Hoosiers age 60+ who want to remain in their current residence

Sources:
Age Wave, Foundation Center, 2009 Indiana EngAGEment Survey, 2008 Indiana AdvantAge Initiative Community Sruvey

What are Communities for a Lifetime (CfaL)?

Though they can carry many different labels ("livable," "inclusive," "lifelong"), communities for a lifetime have the simple goal of being great places to grow up and grow old. In short, they are communities for all ages and abilities.

Why Philanthropy?

Philanthropic organizations of all shapes and sizes are well positioned to support these communities through convening community conversations, communicating unbiased messages, catalyzing action and contributing to community change. They are perfectly suited to the role(s) of convener, communicator, catalyst or contributor because they have the respect of community stakeholders, access to data, altruistic agendas and a variety of resources.

Which Role is Right for You?

Through supporting communities for a lifetime, in any appropriate role, philanthropic organizations are able to address present needs and help alleviate the systemic causes of those needs. By carefully considering your foundation's role(s) in creating community change, you can maximize your philanthropic investment and improve the quality of life for older adults, people with disabilities and children.

Indiana Grantmakers ALLIANCE
...advancing philanthropy
indianagrantmakers.org

Indiana Institute on Disability and Community
Indiana's University Center for Excellence in Developmental Disabilities
Research, Education, and Service
iidc.indiana.edu

INDIANA UNIVERSITY PUBLIC POLICY INSTITUTE
policyinstitute.iu.edu

Convener Role

Improving a community, from beginning to end, involves organizing people. Money is often secondary.

ABOUT THE ROLE

As conveners, philanthropic organizations can indirectly or directly support grassroots organizing and advocacy, create and support partnerships and networks, and respond to tense community issues. This goes well beyond "holding a meeting" and is unique to philanthropic organizations because they are stable and neutral third parties with significant resources and altruistic interests.

Indirectly, funders can support grassroots convening and advocacy efforts through grants to nonprofit organizations such as Area Agencies on Aging (AAAs), neighborhood associations, community health organizations, community development organizations (CDCs), and/or other community-based organizations.

Foundations can **directly** convene stakeholders through a variety of convening activities. Examples of direct covening activities include:

- encouraging, creating and supporting community development networks;
- convening community quality-of-life planning meetings;
- scheduling one-on-one talks with policy makers, civil servants (e.g., planners), architects, nonprofit organizations, and residents;
- holding project-specific and agenda-driven events (e.g., in support of a senior housing project or to discuss access to health care);
- gathering other funders, such as private developers, government funders, banks, and other community development funders; and
- working with a regional association of grantmakers or funder affinity group like Grantmakers in Aging to tackle an issue, expland knowledge, pool funds, or limit risks.

CONVENER

partner

network

gather

Skills Needed to Tackle the Role

Patience
with people and processes

Flexibility
to meet folks on their turf, even after-hours, and navigate staff or leadership changes

Connections to participants and stakeholders
making sure the right people are at each meeting

Awareness of decision-making processes
zoning, planning

Good listening skills

Resources Needed to Tackle the Role

Time
to plan, execute, follow up on ALL meetings

People
to plan, execute, follow up on ALL meetings

Trained or adept facilitators

Appropriate meeting space
appropriate location, size, seating; accessible; good lighting and sound

1-5 goals for each and every meeting

Supplies
refreshments, paper, pens, flip charts, AV, signs, name tags

THE ROLE IN REAL LIFE

In 2007, the Division on Aging of the Indiana Family and Social Services Administration was intrigued to learn about the concept of the naturally occurring retirement community, or NORC. These are communities that exhibit a high concentration of older adults, not by intent (as in Sun City) but because of natural conditions like the aging of the population and the out migration of young people. The Division realized that it could achieve economies of scale and efficiencies of service by targeting support to such places. A grant was provided to the University of Indianapolis Center for Aging and Community to support 18-month projects in five Indiana NORCs. The Center convened stakeholders in each community to assess needs and assets, develop a plan, and begin to implement action around "pillar" issues.

Projects ranged from home modification to transportation and neighborhood clean-up. While the funds provided by the Division on Aging were temporary, the senior advisory groups that had been empowered to supervise each program remained intact. In 2013, at least three of them received additional funds from the Indiana Housing and Community Development Authority to continue their work. The project demonstrated the importance of including older adult leaders in the convening process as projects get off the ground. The convening process linked isolated leaders with important local stakeholders and helped build community knowledge and capacity for long range impact.

A participant in a Linton community planning session gets help from a neighbor to complete his livability survey.

To learn more about this story, visit:
http://www.norcblueprint.org/stories/ Indianas_Statewide_Approach/

Communicator Role

Framing the issue may be the most important thing we do,
for how we define the problem will determine what we do to solve it.

ABOUT THE ROLE

As communicators, philanthropic organizations can play a critical role in developing age- and ability-friendly communities. To be effective in this role, foundations should carefully consider their messages, methods, and targeted audiences as they communicate the importance of this work through data, research, and educational programs. Data, research, and educational programs help communities frame issues, build awareness, strengthen public will, and solve problems—all of which are vital to developing Communities for a Lifetime.

One of the easiest communication roles a foundation can play is that of **information creator**. Many foundations fund or have relationships with research centers and policy institutes that possess a wealth of information on a community's population, demographic trends, zoning, and public policies. Foundations can work with these centers to create data sheets, commission studies, and conduct policy analysis. These data partners can help create and disseminate relevant information targeted to traditional (e.g., developers and CDCs) and nontraditional (e.g., nonprofit agencies and churches) stakeholders.

Another simple role foundations can play is that of **information curator**. Foundations can network with various stakeholders involved in developing CfaLs to collect and share information and best practices. It is not uncommon for best practices to be shared only within the silos of community development work (architects share with architects and planners share with planners). Foundations can connect myriad stakeholders to data, resources, and specific examples of effective CfaL design.

COMMUNICATOR

create

curate

disseminate

Finally, foundations can become **information disseminators**. This includes developing or sponsoring trainings for community development practitioners, conducting policymaker education programs, printing public information materials, and funding curricula to train elders and those with disabilities to advocate for themselves. Because of their neutral, respected, and credible reputations, foundations can also vet community plans and communicate with stakeholders when trouble arises within a project. They can check in with their nonprofit partners about the feasibility of community plans and serve as an effective mediator of conflicts between government, planner, resident, and developer interests. Foundations have an opportunity to ask questions that can form consensus. They also have an opportunity to translate development jargon into community and nonprofit language. There is an abundance of acronyms in this work and planners admit they often have their own language. A well-informed foundation can help keep communication lines clear and share information in languages that all stakeholders can understand.
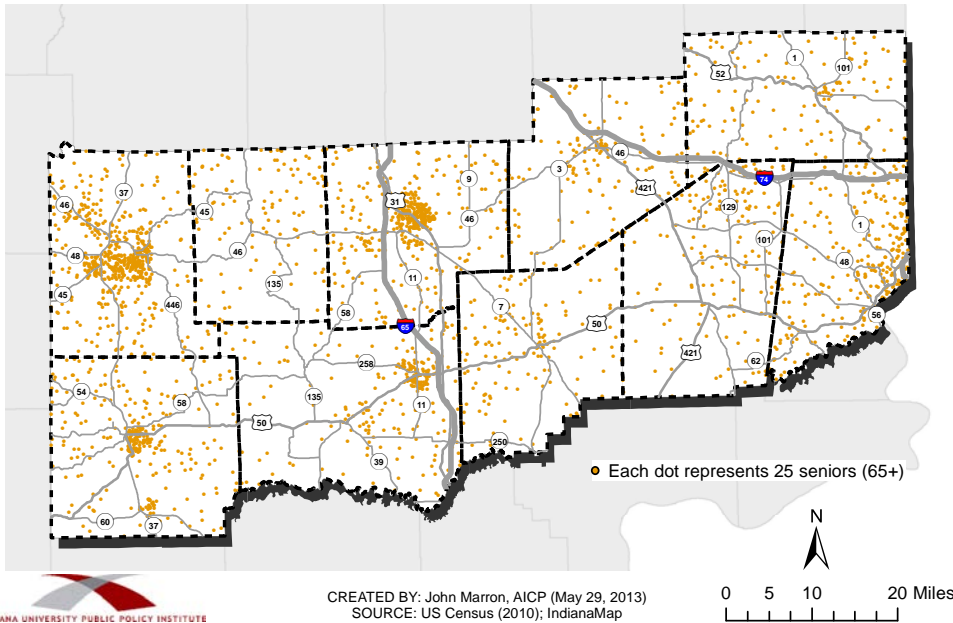
A COMMUNICATION EXAMPLE

Southeast Indiana Senior (65+) Population

Each dot represents 25 seniors (65+)

CREATED BY: John Marron, AICP (May 29, 2013)
SOURCE: US Census (2010); IndianaMap

0   5   10   20 Miles

This map of the southeast Indiana senior population was created by the Indiana University Public Policy Institute (PPI) for a regional meeting of Indiana grantmakers. The map is a perfect example of how simply sharing data can effectively communicate the need for age- and ability-friendly communities.

THE ROLE IN REAL LIFE

Aware of changing age demographics, the Plough Foundation, a family foundation based in Memphis, TN, decided to explore its role in promoting the welfare of the growing older population in the metro area and surrounding communities. A planning year (2012) was devoted to the development of a base of knowledge that would guide the board in making important decisions regarding the foundation's role. Using census and best practices research, focus groups, and survey data, the foundation evaluated issues related to older adults, caregivers, and the nonprofit agencies providing services to these populations. It was determined that one of the chief problems on the horizon was poor communication: agencies were not effectively networked, the general public and policy makers were not aware of the needs and contributions of older adults, and older adults and caregivers

themselves were poorly informed about community services and volunteer opportunities.

The foundation decided to carve out roles for itself as a facilitator of networking among stakeholders and an educator of policymakers, the general public, and those most affected—older adults and caregivers. The foundation's focus on communication will promote greater coordination and collaboration among providers, greater understanding and support from policymakers and the public, and improved access to services for older adults and caregivers.

To learn more about this story, visit:
http://www.giaging.org/membership/member-spotlight/plough-foundation/

Catalyst Role

The term catalyst is often used to refer to the prime agent of any change.

ABOUT THE ROLE

Catalyzing community change can take many forms, from funding a pre-development feasibility study to leading a policy initiative or helping disparate funders coordinate investments for greater impact. Foundations of any size can ignite lifetime community work either alone or collectively. They can begin by simply asking the question: "What is possible?" Or, they can focus their grantmaking on a specific funding priority, such as ensuring that seniors have access to the food pantry the foundation supports. They can provide seed funding for a project or accelerate one by offering a challenge grant or matching fund opportunity. Even with limited funds, foundations often have more flexibility than banks and government funders to fund new ideas or organizations.

Philanthropic organizations can also undertake policy work either alone or collectively. Policy work can be controversial but is critical and extremely impactful. The following is a **theoretical example** of how policy work could be applied to advance CfaLs.

Define the Problem
Public and nonprofit funders from across Indiana recognize that their funding priorities can unintentionally end up working at cross purposes. For example, a group of funders may promote a walkable downtown while a group of economic development leaders advocates for widening highways and raising speed limits through town.

CATALYST

study

seed

advocate

Set the Agenda
Public agencies and nonprofits propose a program that would provide state agencies (and local funders) a mechanism by which they could collaborate to be more efficient and effective on local investments.

Get the Policy Adopted
A multi-agency partnership designed to fund comprehensive community development projects in Indiana's smaller communities is formed, formalizing a partnership between the Indiana Office of Community and Rural Affairs (OCRA), the Indiana Housing and Community Development Authority (IHCDA), and the Indiana Department of Transportation (INDOT), as well as philanthropic organizations. Through this program, known as Stellar Communities, Indiana state agencies and philanthropic organizations are able to create greater impact with fewer resources through streamlining their investments to reinforce one another.
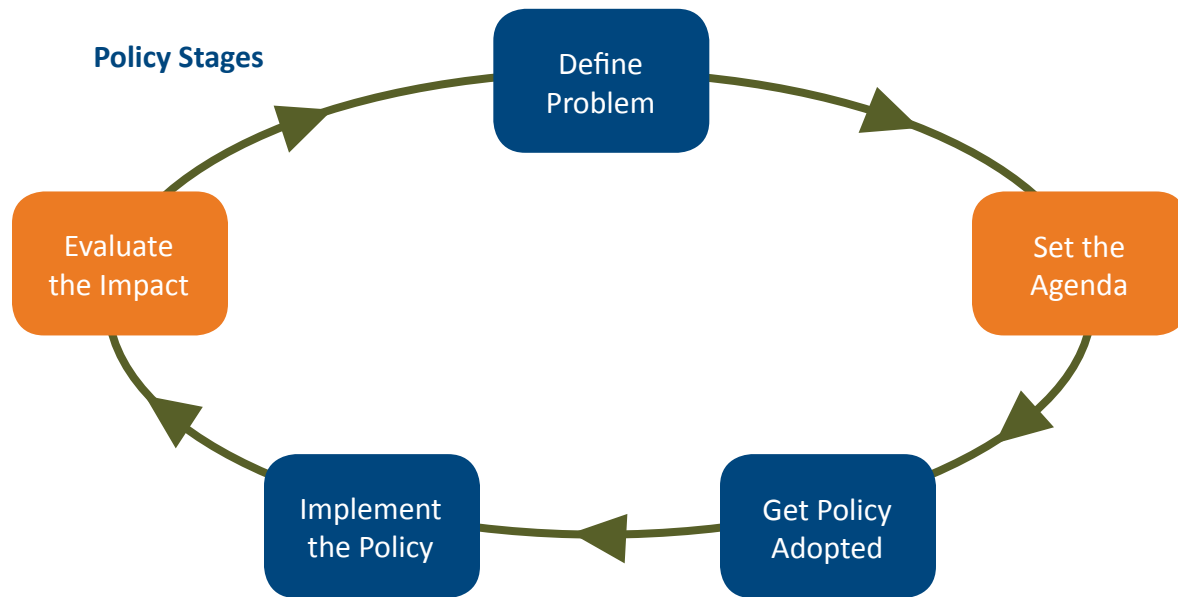
Implement the Policy
Three Indiana communities are designated as Stellar Communities and receive funds. As a result of this intentional partnership around Stellar Communities, the funders become more familiar with one another and are more readily able to work in concert on projects outside of the Stellar Communities program.

Evaluate the Impact
The multi-agency partnership evaluates the success and challenges of the initiative and provides additional support for continued work in each of the Stellar Communities.

Catalyst Role Model

Policy Stages

Define Problem

Set the Agenda

Evaluate the Impact

Implement the Policy

Get Policy Adopted

Concepts from James Ferris and Michael Mintrom, 2009.
Visual adapted from the California Endowment.

THE ROLE IN REAL LIFE

In 2010, the Indiana State Housing and Community Development Agency engaged in a significant strategic planning process, looking at demographic trends, societal changes, and changing conditions. Among other innovative steps, the agency selected "aging in place" as one of four strategic priorities that would guide future funding directions.

Soon after, this priority was manifested in the creation of a grant program to support Indiana communities in becoming CfaLs. With the help of an advisory committee, three applicants were funded to undertake small six-month participatory planning grants which they would use to create comprehensive implementation plans. In the winter of 2013, the three communities received a total of $1.1 million

to undertake age- and disability-friendly projects such as sidewalk restoration, owner-occupied home rehabilitation, and accessibility improvements to community infrastructure. In a wonderful example of systems thinking, the agency also recruited the involvement of other agencies doing work outside of the IHCDA wheelhouse. These other agencies and statewide organizations are assisting the grantees with projects related to transportation, the arts, and historic preservation.

Contributor Role

ABOUT THE ROLE

Though money is not always required to improve a community, financial support is vital to creating age- and ability-friendly communities. Foundations can reactively fund grant applications which support age- and ability-friendly communities or proactively fund projects, initiatives, and organizations which create age- and ability-friendly communities. Funding levels can vary from small grants to install handrails in a community center to multi-million dollar projects that provide seniors access to shopping and cultural attractions (see the Indianapolis Cultural Trail example on the next page).

In community development, intermediary organizations often work to aggregate funding from a number of sources (e.g., governmental, philanthropic, private business, and individual donors) and re-grant those resources to advance a community's development agenda. Proactively funding or working with intermediary organizations is an effective approach to accomplish community development goals, because these organizations have the skills (e.g., community organizing), technical expertise (e.g., real estate development), experience (e.g., navigating planning and zoning requirements), and relationships to connect funders to those local organizations that implement projects and create age- and ability-friendly communities. Examples of national community development intermediaries currently working in Indiana include the Local Initiatives Support Corporation

CONTRIBUTOR

fund

staff

host

(LISC) and Neighborworks America. The Indiana Association for Community Economic Development (IACED) is an example of a statewide community development intermediary. Examples of local intermediaries include the Indianapolis Neighborhood Housing Partnership (INHP) and the Indianapolis Neighborhood Resource Center (INRC).

Another critical contribution that local funders may make in developing a CfaL is providing a local match. Many state and federal programs require the areas benefiting from an investment to provide a local contribution, either cash or an in-kind investment, to demonstrate local commitment to a project.

In addition to providing grants, foundations can also participate as investment partners in age- and ability-friendly community development. Program related investments (PRIs) are an excellent way for foundations to help develop CfaLs with limited dollars. PRIs can limit risk, leverage dollars for maximum impact, and provide the foundation with economic and social returns on its investments.

Aside from financial support, foundations can also contribute in-kind services such as staff time, meeting space, and office space. As with monetary contributions, in-kind contributions can vary in size and scope. In some cases, the mere caché and expertise of a foundation can be as effective as a cash contribution.

Contributor Role Model

*Residents of varying ages and abilities enjoy the walking
and biking paths of the Indianapolis Cultural Trail.*

Photograph by Matt Carroll

Photograph by David VanDeman

THE ROLE IN REAL LIFE

The Indianapolis Cultural Trail: A Legacy of Gene & Marilyn Glick is a world-class urban bike and pedestrian path that connects people of all ages and abilities to neighborhoods, cultural districts and entertainment amenities, and serves as the downtown hub for the entire central Indiana greenway system. The Cultural Trail was made possible by a large public and private collaboration led by Central Indiana Community Foundation (CICF), the City of Indianapolis, and several nonprofit organizations devoted to building a better city. The trail was officially completed in 2013 after more than 12 years and a $60 million investment.

CICF contributed to the project in many ways. Financially, the foundation granted administrative and capital dollars to the project. It also played pivotal roles in accessing federal and local transportation dollars as well as corporate support for the project. CICF was very successful in leveraging funds from its donors and donor-advised funds to support the project. In terms of in-kind support, CICF initially housed the administrative offices, staff, and website for the project, and led bike and Segway tours of the trail. Finally, CICF contributed its community-building experience, sterling reputation, and organizational caché to support the project during all of its phases.

**To learn more about this story, visit:
http://www.indyculturaltrail.org**

Getting Involved & Learning More

ADDITIONAL RESOURCES

Click on any of the **links** below for more.

Convening Resources

National consultants on convening strategies include **Interaction Institute for Social Change** and **Harwood Institute**. The **Institute for Coalition Building** is a resource for Indiana communities building quality of place coalitions. Written resources include: **Developing Effective Coalitions: An Eight Step Guide**, **Coalition Building Basics** and **Developing Great Neighborhoods**.

Communication Resources

Multiple communication resources can be found through Grantmakers in Aging's **Community AGEnda Initiative**, specifically GIA's **Aging Power Tools**. Concepts and values of age- and ability-friendly communities can be found through resources provided by the **World Health Organization**, **AARP**, **Social Determinants of Health**, and the **Center for Disease Control and Prevention**. A **glossary of planning and community development terms and acronyms** is included in a handbook developed by the City of Indianapolis Division of Planning (glossary begins on page 43).

Catalyst and Contributor Resources

To learn of age-specific projects that have been supported by philanthropic organizations, visit **Community AGEnda's Age-Friendly Database**. To learn more about PRIs visit **Mission Investors Exchange**.

Still Have Questions?
Ask Phil Stafford at IU's Indiana Institute on Disability and Community at staffor@indiana.edu.
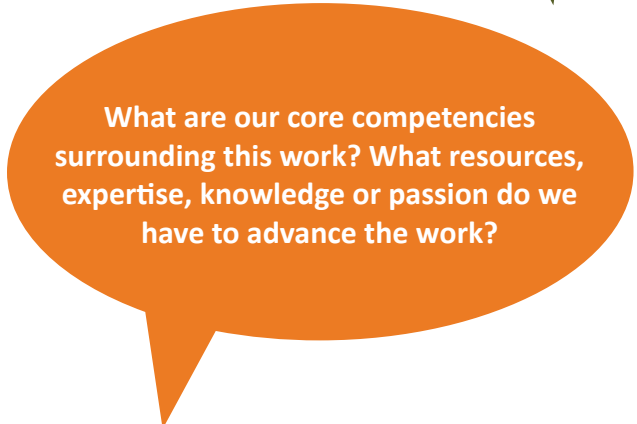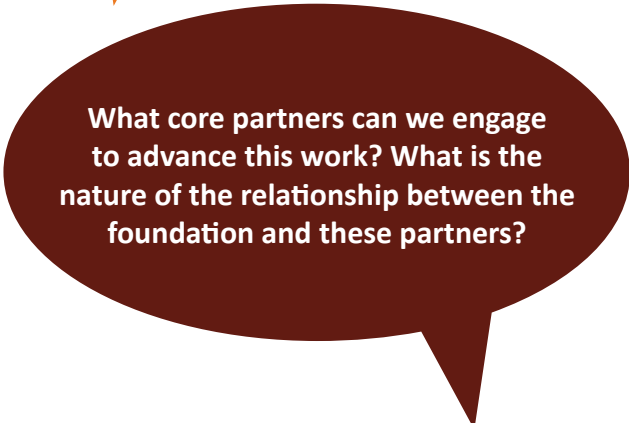
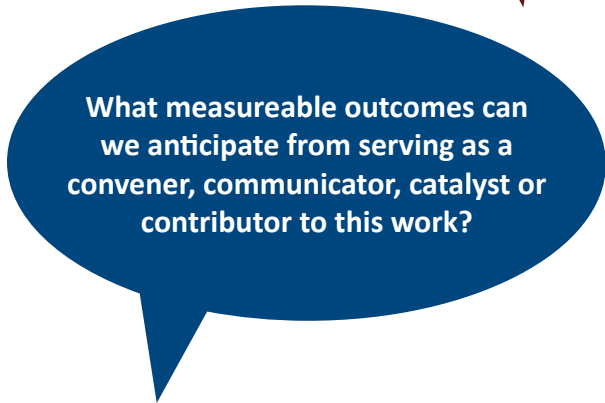## Community AGEnda

Determining Your Role

How is developing a CfaL strategically aligned to our foundation's giving priorities?

What are our core competencies surrounding this work? What resources, expertise, knowledge or passion do we have to advance the work?

What core partners can we engage to advance this work? What is the nature of the relationship between the foundation and these partners?

What measureable outcomes can we anticipate from serving as a convener, communicator, catalyst or contributor to this work?