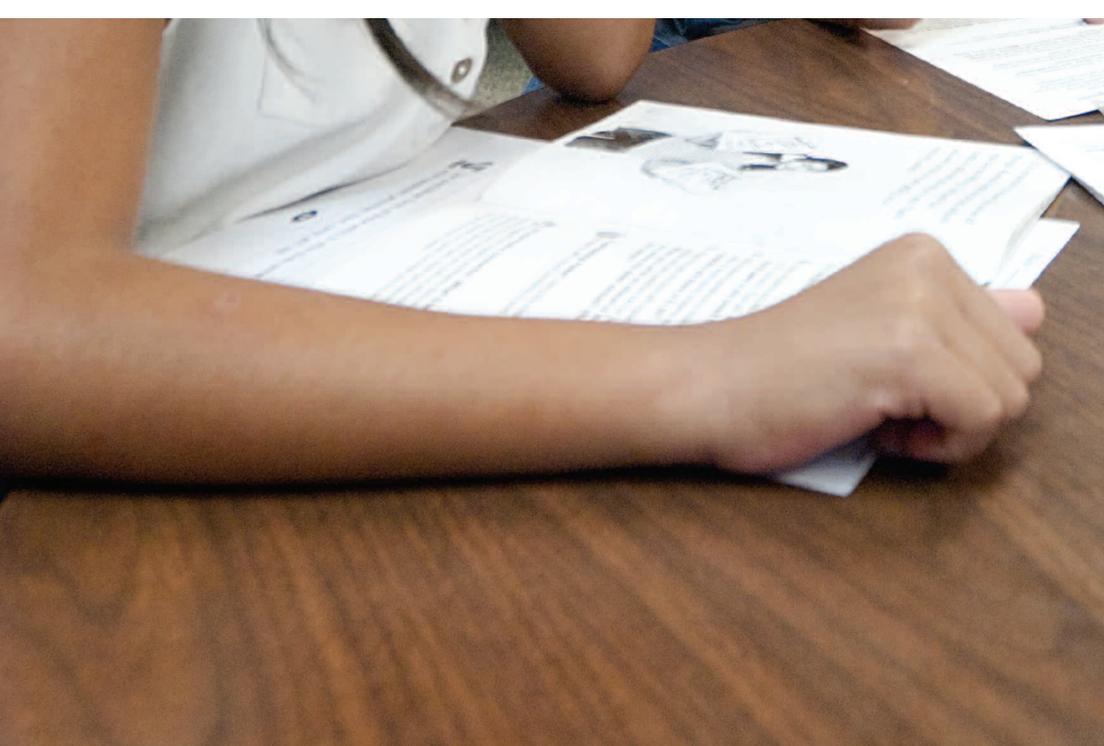




Piper Report:
Strategies, projects and
lessons learned in civic
engagement grantmaking



Civic Engagement



“There is a mad scramble across the country to figure out what to do with the bonus years in later life when we are healthy but past traditional retirement. Arizona will serve as a vanguard of a new way of approaching this new period of life. The experiments in Maricopa County’s civic engagement learning lab and the lessons learned will be in great demand.”

Marc Freedman

Author and Founder
Civic Ventures

Piper’s Stand

Older adults in Maricopa County, Arizona, must have opportunities to remain healthy, independent and assets to their communities.

Piper’s Approach

Prevent disease and disability.

Promote peak physical and emotional health.

Encourage rewarding and productive activities.

How It Happened

by Carol Kratz, Piper Trust Program Director

I can still remember the first time I heard the term *civic engagement*. Marc Freedman, founder of Civic Ventures, spoke about his book *Prime Time* at a 2001 Grantmakers in Aging Conference. I was a green program officer working for the fledgling Phoenix-based Virginia G. Piper Charitable Trust, and I had the responsibility for developing Piper's older adult grantmaking approach.

Freedman's refreshing vision of capturing the energy and experience of Boomers for social benefit matched other emerging ideas I had gleaned: the updated essentials for successful aging that authors Rowe and Kahn identified; local perspectives on aging from our own community conversations; and data from a Piper-funded Visiting Nurses Survey. The research in particular confirmed that Maricopa County had a smaller percentage of frail elderly and far more healthy older adults who wanted to be involved and productive.

Our most ambitious commitment to older adults has concentrated on civic engagement. When we launched our grantmaking in this area there were few models or tested programs to take from the shelf. So we originated and piloted projects and worked with our community partners to discover feasible approaches. The path hasn't always been smooth. Thankfully, we have had Civic Ventures, our principal technical advisors, to work with us and help us stay the course.

Since 2002 we have encouraged programs to take root in Maricopa County. Some programs are firmly planted such as Experience Corps and Your Experience Counts tutoring programs, as well as the Tempe Connections activity center that grew out of our early Next Chapter initiative.

In recent years we have been planning a hub to work both sides of the older adult opportunity equation: helping nonprofits offer Boomers meaningful activities and helping Boomers find these meaningful activities. We hoped the community would "own" this effort, and it has. A new bright spot, Experience Matters Consortium, has taken this point position with widening and deepening community support.

We look forward to more great things.





THE BABY BOOM GENERATION

Boomers are entering retirement age. As a group they show a desire to reshape retirement. Redefining retirement—from developing new careers to finding volunteer opportunities and making social contributions—is a formidable task. It is currently, as guru Marc Freedman would say, a “do-it-yourself” undertaking. Indeed, the demand for volunteering and recareering has outpaced the supply of prospects. Few nonprofits and civic institutions have developed positions to capitalize on older adults’ time, skills and wisdom.



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Creating
a Vision for
Maricopa
County



Experience Matters Consortium engages Boomers and nonprofits to build social impact. (Above) The Scottsdale Next Chapter steering committee discusses opportunities for older adult programming. (Top) The Chandler Next Chapter program provides services in the public library.

Even a decade ago serving older adults invoked a frailty paradigm: adult day care, assisted living, home delivered meals and congregate dining. As increased longevity pushes frail old age to later and later decades, a growing number of people with better educational and financial backgrounds face many healthy years ahead of them at the typical retirement age. This new paradigm requires serving the entire age span from frail older adults to the youngest Boomers who are just beginning to think about retirement.

In 2001, the key question was how to engage Boomers in meaningful and purposeful activities. The communities of Maricopa County, which includes Greater Phoenix, did not understand how to engage older adults and had no unified strategy or proven approach. Without models, Piper Trust sought advisors, convened community partners, and funded unproven programs—all the time keeping an eye on the goal for the community to envision and embrace its own concept of engaging older adults.



Maricopa Commission on Productive Aging, 2001

Organizations

Civic Ventures and Libraries for the Future, technical assistance

What

- Develop a process to plan jointly with agencies and individuals currently involved or potentially interested in older adult issues in Maricopa County.
- Focus planning on building programs within existing institutions such as libraries and community colleges that have broad recognition and are places where community residents congregate.

Why

The AdvantAge Visiting Nurses Survey of older adults in Maricopa County revealed a desire to volunteer, connect with others and continue learning (see survey summary on page 8). Because few opportunities existed for older adult engagement, the Maricopa Commission on Productive Aging developed a Life Options Blueprint detailing activities and resources needed to assist older adults in these endeavors.

Grant Terms

Two grants, \$90,000 over two years and \$102,000 over two years



“Next Chapter” Centers, 2004

Organizations

Chandler Public Library, Mesa Community College, Scottsdale Community College, City of Tempe Community Services Department
Civic Ventures, technical assistance

What

- Create places and spaces, coined Next Chapter Centers, to provide a wealth of services including life planning assistance, links to volunteer opportunities, lifelong learning and training and social connections with other Boomers.
- Embed these services in the community through existing institutions, specifically community colleges and libraries, and build collaboration among projects.

Why

The Life Options Blueprint led to requests for proposals for Next Chapter projects. These projects were designed to implement the Blueprint into well-known community entities rather than create new organizations or work with small nonprofits with little recognition. The four Next Chapter programs had different designs and objectives and produced varied levels of success. The Tempe Connections Next Chapter project alone continues (see a summary of Tempe’s project on page 17).

Grant Terms

Four grants ranging from \$194,310 to \$547,644 over two to three years, plus a \$363,500 grant to Civic Ventures for technical assistance



Experience Matters Planning, 2009

Organization

Civic Ventures, technical assistance

What

- Develop a 15-member coordinating task force, engaging the public and private sectors, to describe the opportunities available to older adults and nonprofit agencies.
- Create an ongoing organization to implement civic engagement organizing in the community.

Why

Working with Civic Ventures and the Brecon Group, the Trust wanted to employ the experiences from Piper grantmaking along with fresh research, convening and workshops to define the next steps in civic engagement. The project, named Experience Matters by the community task force, worked to identify leaders and champions to advance the cause, align current and future efforts and define strategic implementation.

Grant Terms

Two one-year grants, \$250,000 and \$20,000

Experience Matters Consortium, 2010

Organization

Experience Matters Consortium

What

- Establish a new entity with two purposes: 1) Assist community organizations to develop high-level volunteer opportunities. 2) Link older adults with these opportunities.
- Embed these services and the new organization in the community.

Why

The mission of Experience Matters Consortium is to develop a way for community organizations to learn from each other and show other organizations the benefits of utilizing experienced volunteers. Because Maricopa County does not have a community volunteer center, older adults interested in these positions have a difficult time finding opportunities. This new membership organization helps link these individuals to paid and unpaid job openings developed by nonprofit members.

Grant Terms

Three grants, \$17,200 for one year, \$75,000 over two years and \$92,000 for one year

LESSONS LEARNED—Creating a Vision for Maricopa County

FOR FUNDERS

1. Innovation is not a smooth path and some seemingly well-conceived projects do not always succeed as planned. Embracing risk and experimentation is essential; even less successful projects are critical for learning.
2. Change is difficult unless it is driven by the organization itself. Community institutions have their own needs and agendas; funding them to implement an entirely new model of service is challenging unless there are obvious continuing resources and internal champions.
3. Technical assistance by national consultants can help funders conceptualize and implement new models as well as identify gaps in their program planning. Providing technical assistance to nonprofits helps improve performance and sustainability.
4. Organizational capacity and committed leadership are two predictors of success. A grant, no matter how large, will not necessarily ensure transformational change.

FOR NONPROFITS

1. Don't do everything at once. Successful projects phased in new programs and built their services one step at a time.
2. What looks good on paper may not fit culturally or programmatically. Tweaking novel ideas in implementation can help ensure integration into organizational thinking. Planning for a program's sustainability derives from identifying and incorporating lessons learned as the project unfolds.

Two Perspectives on Volunteering

OLDER ADULTS



Wanting to give time
and talents as volunteers or for pay

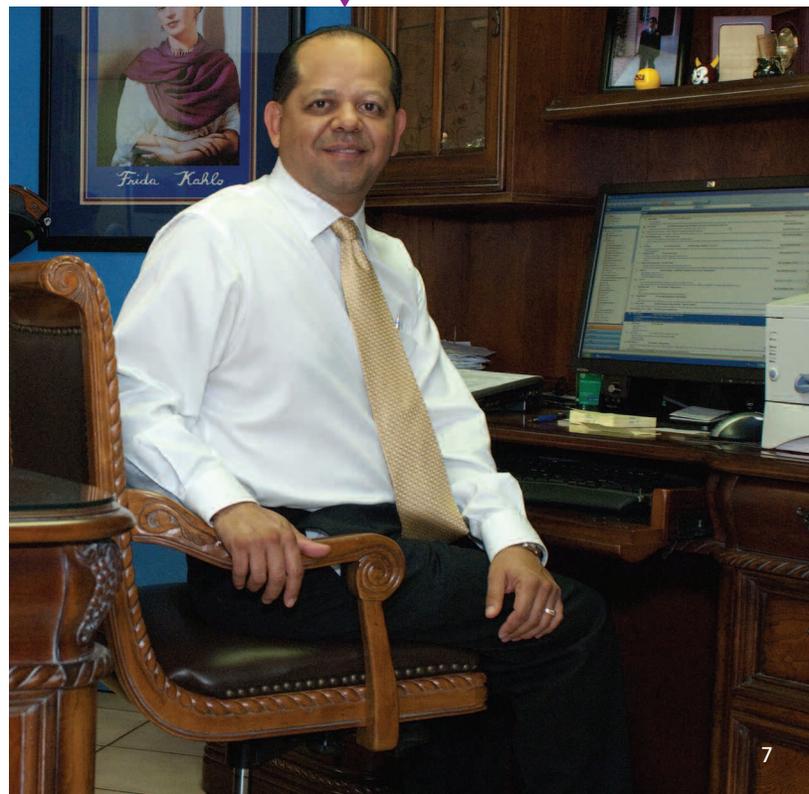
*“How do I find
opportunities for
meaningful work and
the pathways to
significant
engagement?”*

NONPROFITS/GOVERNMENT



Requiring human capital
to tackle social needs

*“How do we change
our organizational
processes to create
positions to use
the strengths of
older adults?”*



Maricopa County Population



US Census Bureau 2010 Demographic Profile

Questions

What are the greatest needs of older adults in Maricopa County? How should Piper Trust, as a new grantmaker, design its older adult grantmaking guidelines?

Purpose

Shortly after beginning competitive grantmaking in 2001, the Piper Trust commissioned the Visiting Nurse Services of New York and Westat to survey Medicare recipients in Maricopa County to understand the needs and challenges of the county's older adult population.

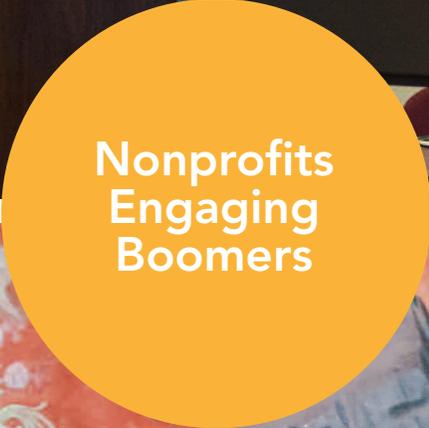
Findings

- The overwhelming majority of respondents were satisfied with their communities and their overall lives.
- Rather than problems with meeting basic needs, older adults were most concerned about maximizing health and well-being and fostering meaningful connections with family, neighbors and friends.

- Eighty-three percent of older adults rated their health as good or excellent and 88 percent needed no help to accomplish daily tasks

Result

Based on the findings, the Trust concentrated grantmaking on preventive healthcare and social and civic engagement. Older adult funding guidelines were three-fold: 1) Prevent disease and disability. 2) Promote peak physical and emotional health. 3) Encourage rewarding and productive activities. Detailed survey findings are available at www.pipertrust.org.



Nonprofits
Engaging
Boomers



A retired volunteer demonstrates the functions of the human heart at the Arizona Science Center. (Above) Mesa cultural institutions engaged retired volunteers to redo signage to make the Arizona Museum of Natural History easier to navigate. (Top) Retired CFO Clark Hurlbert works with the Mesa water department to analyze the costs of sewer conversion.



Nonprofits are interested in utilizing volunteers in new ways. However, a culture shift is required to integrate new kinds of volunteers in their organizations. Boomers are diverse financially, culturally and in physical conditioning. For some, work is a necessity. Others have the financial freedom to travel, volunteer and try new things. Even among volunteering Boomers some need health benefits like prescription assistance, some require no remuneration, and others desire stipends, especially those taking highly skilled, executive positions. For the new experienced volunteers, the traditional episodic volunteer slots are not appealing. High-level volunteer positions require specific job descriptions, interviews, staff integration, orientation and performance reviews, as well as the need for monitoring expectations.

Language is important in recruiting paid and unpaid volunteers—words like *senior*, *old*, *older* and *aging* do not resonate with Boomers. The most effective recruiting approach focuses on experience and skills, not age.

“Maricopa Models of Significant Service”

Organizations

Arizona Science Center, Banner Health, Benevilla, Big Brothers Big Sisters of Central Arizona, City of Mesa Arts and Culture Department, Duet: Partners in Healthy Aging, Friends of the Tempe Public Library, Hacienda Healthcare, Mesa United Way, The Centers for Habilitation, National Council on Aging (NCOA), technical assistance

What

- Develop and pilot an innovative national model for nonprofits to create volunteer programs for older adults.

- Organize a peer-learning group of 10 organizations conceiving programs to engage older adult volunteers (see short summaries of four of these projects on page 12).
- Incorporate local learnings into the national pilot program of 12 nonprofits.

Why

In 2007, NCOA launched the RespectAbility: Models of Significant Service initiative with 12 nonprofits nationwide. Piper Trust collaborated with the national organization to expand the initiative to 22 nonprofits including 10 Maricopa County organizations. Many nonprofits had not yet accepted the concept of developing specific volunteer opportunities for older adults.

Grant Terms

10 grants of \$43,000 each over two years; plus \$196,000 to NCOA for technical assistance

AmeriCorps and Executive Volunteer Programs

Organization

Mesa United Way

What

- Launch two new programs placing skilled, older adult AmeriCorps volunteers in nonprofits to assist with organizational, managerial and technical needs.
- Match experienced retired older adults with nonprofits for short-term projects; for example, placing a retired chief financial officer with the City of Mesa to provide a financial assessment of sewer system changes.

Why

The Mesa United Way program evolved from the organization’s prior Models of Significant Service grant. In addition to awarding grants to nonprofits—especially in tough economic times—the opportunity to “grant” skilled volunteers became another way for Mesa United Way to assist local nonprofits.

Grant Terms

\$50,000 over 27 months



Area Agency AmeriCorps Program

Organization

Area Agency on Aging, Region One

What

- Recruit older adult AmeriCorps volunteers to assist with senior center wellness programs.
- Provide in-home assistance for isolated older adults.

Why

The Area Agency on Aging is the major conduit for government funding for aging services in Maricopa County. Use of AmeriCorps volunteers allows the organization to increase the breadth and quality of services the agency offers and at the same time connect retired older adults with opportunities to improve their communities.

Grant Terms

\$150,000 over three years

“Learning Lab Workshop”

Organization

Experience Matters Consortium

What

- Introduce a national model to train nonprofit staff on ways to incorporate older adult volunteers into organizations.

Why

Experience Matters helps nonprofits shift volunteerism to better integrate experienced older adults. Based on a Temple University training model, the Learning Lab’s two-day workshop helps nonprofits discover ways to benefit from employing experienced older adult volunteers. Each nonprofit sends a team—the executive director, program manager and volunteer coordinator—to the workshop. When training ends, the organization has an actionable older adult volunteer plan.

Grant Terms

Initially funded with core grants of \$184,300 to Experience Matters Consortium

LESSONS LEARNED—Nonprofits Engaging Boomers

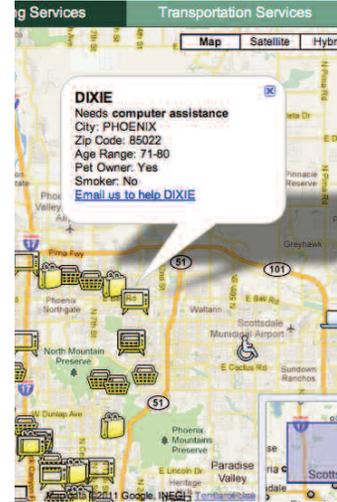
FOR FUNDERS

1. Every step of the engagement process—building readiness, shifting culture, developing new volunteer structures, recruiting volunteers and implementing the volunteer system—takes time and patience.
2. Investing in “ready” organizations improves chances for success. Signs of readiness include: strong executive leadership and a board committed to change; a well-developed plan; and adequate financial and human resources to propel the plan.

FOR NONPROFITS

1. Including older adults in planning and implementing volunteer programs improves the programs and jump-starts the recruiting effort.
2. The ideal high-level volunteer likes a job description with specific job responsibilities and a title of importance such as project leader, volunteer coordinator or mentor; wants the responsibility to plan and the ability to make decisions; and seeks self-direction and autonomy.
3. Traditional volunteers do not require this same level of human resources management as these new volunteers, and larger organizations with well-developed volunteer programs may be less flexible in changing to adapt to the special requirements of highly skilled volunteers.
4. Collaboration among nonprofits can develop more relevant programming and improve engagement messaging and recruiting.

Maricopa Models of Significant Service



Linking nonprofits with a national movement for innovative volunteer programs

The Maricopa Models of Significant Service was Piper Trust's first attempt to help nonprofit leaders and staff re-envision older adults as prime experienced volunteers. These grants of \$43,000 each over two years helped 10 nonprofits create unique older adult volunteer projects. These pilot projects joined 12 other pilots as part of National Council on Aging's RespectAbility initiative.

- NCOA's research indicates that employing older adult volunteers in high-level leadership roles strengthens the capacity of nonprofits.
- The value of the volunteers' contribution far outweighs the cost of recruiting and training these volunteers.
- Some of the RespectAbility projects continue today including Arizona Science Center, Mesa Arts Center, Duet: Partners in Healthy Aging and Banner Health.

Arizona Science Center

The Science Center's project—"Friends of Science and Technology Education"—recruited retired engineers and former teachers of science, technology, engineering and math to develop and demonstrate new hands-on learning activities and experiments for touring school children.

City of Mesa Arts and Culture Department

The "Ubuntu Project" cultivated diversity programs for Mesa Arts Center, Arizona Museum

(Above left) Retired engineers are among the skilled volunteers at the Arizona Science Center. (Above) A customer survey designed by an older adult volunteer helps improve services to Mesa museum patrons. (Above right) Duet: Partners in Healthy Aging uses an online mapping program created by an experienced volunteer to link volunteers with those who need services.

for Youth and Arizona Museum of Natural History and contracted with four older adults to create an interactive website, develop simple surveys to understand visitor experiences and redesign signage to make the museums easier to navigate.

Duet: Partners in Healthy Aging

Duet restructured its volunteer program to encourage older adults to volunteer more frequently and work in their own neighborhoods. The solution was an interactive website "Services Map" showing the location of individual homebound adults needing help such as getting groceries or a ride to the doctor.

Banner Health

Through a Supervised Volunteer/Leader Team, Banner Health changed its volunteer structure and revised volunteer positions to attract retirees. Banner asked volunteers to sit on committees and serve as employee mentors. Staff members are now trained to work with volunteers, most notably through a video, "A Day without Volunteers," which advocates for hospital volunteers.

Retirement, Recareering and Volunteerism Survey, 2009



More than half of retirees believe retirement is a time to take it easy—take a much-needed rest from work and daily responsibilities.

Older adults still working or not fully retired tend to see retirement as a time to begin a new chapter in life—new activities and new goals.

Question

What is the level of interest among older adults in giving back to the nonprofit community through volunteering and new careers?

Purpose

The Piper Trust commissioned a telephone survey of 400 Maricopa County adults between 50 and 70 years of age to understand better their attitudes about work, retirement, volunteerism and recareering.

Findings

- The average expected age of retirement among respondents was 69.
- Older adults have been significantly affected by the economic downturn with those planning to work past 65 mainly motivated by economic

necessity rather than the enjoyment of working.

- A majority of those still working perceive retirement as an opportunity to begin a new active and involved chapter in life rather than a time for leisure.
- Older adults who are interested in recareering are typically looking for jobs with sizeable compensation and minimal retraining.

Result

Piper Trust provided detailed survey findings to the Experience Matters strategic planning task force as well as to technical advisors Civic Ventures. Detailed survey findings are available at www.pipertrust.org.



Boomers Finding Meaningful Activities



An instructor in the Center for Workforce Transition at GateWay Community College demonstrates transfer techniques to recareering older adults. (Above) A Scottsdale Next Chapter volunteer teaches high school girls about self-esteem. (Below) Tempe Connections Café is a hub for older adults and other community members.





What

- Pilot and launch a national model to pair older adult tutors with first through third-grade elementary school students in need of academic assistance.
- Offer older adults satisfaction in doing purposeful work for underachieving children.

Why

Experience Corps is a strong evidence-based national model and the first program Piper Trust adopted to offer meaningful activities targeted to older adults. Experience Corps increases older adults' sense of satisfaction and addresses student test scores. The program was part of the Next Chapter Centers in both Mesa and Tempe.

Grant Terms

Two grants, \$187,334 over 37 months and \$297,397 over 54 months; plus \$69,020 to Civic Ventures

"Your Experience Counts"

Organizations

HandsOn Greater Phoenix and Experience Matters Consortium

What

- Expand the Experience Corps model to include children in fourth through sixth grades with a focus on science, technology, engineering and mathematics as well as reading.

Why

The Experience Corps tutoring pilot was successful in both the cities of Mesa and Tempe. This project extends the

tutoring model to cover additional subjects for older elementary children. HandsOn Greater Phoenix and Experience Matters worked together to introduce this program into Phoenix city schools.

Grant Terms

\$265,100 over 36 months

"Encore Fellows"

Organization

Experience Matters Consortium

What

- Create a stipended fellowship program to place older adults in high-level nonprofit positions attracting well conceived nonprofit placements, fellowship sponsorships and highly qualified fellows.
- Provide \$20,000 stipend to each candidate, half paid by Experience Matters and half by the hiring nonprofit organization.

Why

In this model, piloted in California, nonprofits develop part-time positions to be filled by skilled older adults. This program helps nonprofits consider the worth and availability of older adults in a new way and also introduces retirees to nonprofits where they can donate their time.

Grant Terms

Three grants totaling \$388,500 over three years

LESSONS LEARNED—Boomers Finding Meaningful Activities

FOR FUNDERS

1. Targeted communication and marketing plans to recruit Boomers are essential for success.
2. Evaluation of these projects is challenging on two levels: 1) Identifying measurable outcomes for nontraditional volunteer programs requires new definitions. 2) A nonprofit's capacity to collect and analyze data to measure the effectiveness of these programs may be limited.

FOR NONPROFITS

1. Boomers require guidance to find training opportunities and job placements.
2. Monitoring volunteer expectations through surveys can identify which volunteer best fits an organization's expectations for a role.



Where We Go from Here

Engagement is a key factor in successful aging. Numerous studies document the desire of Boomers to spend 20 to 30 active years after retirement contributing to their communities. These active committed older adults represent a huge untapped reserve of human capital, and those who do engage in these purposeful activities describe their lives as full and meaningful.

After over a decade of civic engagement grantmaking, the Piper Trust intends to develop successful strategies more deeply, expand some projects more broadly and uncover new engagement concepts that are not yet on the horizon.

- **Increasing the capacity and effectiveness of Experience Matters Consortium** as the hub for matching organizations and individuals and linking civic engagement efforts across Maricopa County.
- **Building a strong cadre of retired executives, identified, selected and trained as Encore Fellows** to provide skilled assistance to Maricopa County nonprofit organizations that have specific job requirements, as well as stimulating, even

exciting, stipend opportunities for older adult volunteers.

- **Expanding tutoring projects to reach more at-risk children** in Maricopa County schools with a high index of needy children—not only creating an opportunity for children who need extra attention in reading and math but also giving older adult volunteers positive experiences of engagement.
- **Discovering lifelong learning projects that propel civic engagement for older adults.**
- **Supporting and expanding other community efforts to firmly implant the capability of nonprofits and older adults** to engage in meaningful activities across the county.
- **Recognizing the achievements of individual volunteers and the innovation of organizations** through prizes can propel the momentum of change across the community and raise the visibility of the new paradigm of successful civic engagement.

ABOUT PIPER TRUST

Virginia G. Piper Charitable Trust is a place-based independent foundation serving the needs of the residents of Maricopa County, Arizona. Through grantmaking, convening and community partnerships, Piper Trust supports the Greater Phoenix community. Piper Trust follows Virginia Piper's own funding priorities, awarding grants to nonprofits in the areas of arts and culture, children, education, healthcare and medical research, older adults and religious organizations that provide services to young children, youth and older adults.

VIRGINIA GALVIN PIPER

Virginia Piper began her philanthropic career under the tutelage of husband Paul V. Galvin, founder of Motorola, who died in 1959. She moved to Paradise Valley, Arizona, in 1972 with second husband Kenneth Piper who died in 1975. As a wealthy widow, she could have put aside her active philanthropic work. Yet for the remaining 24 years of her life she devoted her time and energy to improving her adopted state. She personally met with nonprofit leaders, visited agencies, asked astute questions and managed the contributions and correspondence herself. Virginia modeled civic engagement.



Virginia Piper met with nurse manager Debbie Reaves, RN, at the 1993 dedication of the Virginia G. Piper Special Care Unit at Scottsdale Healthcare Osborn.

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This Piper Report is a publication prepared by the Virginia G. Piper Charitable Trust program, evaluation and communication staff. Find the publication online at www.pipertrust.com/media-publications.

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