

# +notebook

THE VIRGINIA G. PIPER CHARITABLE TRUST

| April 2008

## Retirement (Re)Blooms

Creating a Maricopa Model for  
Living the Last Third of Life





# +notebook

## **April 2008**

*Piper Notebook* is a magazine published four times each year—April, July, October (annual report), and January—by The Virginia G. Piper Charitable Trust to disseminate information on the work of the Trust and its grantees in Maricopa County.

Jane E. Ferguson, Editor and writer

Todd Scheuring, Editorial and production assistance

Eddie Shea, Designer

Bruce Peterson, Photographer

The Virginia G. Piper Charitable Trust  
6720 North Scottsdale Road, Suite 350  
Scottsdale, AZ 85253  
480.948.5853  
info@pipertrust.org  
www.pipertrust.org

---

## **ON THE COVER:**

### **BOOMERS FIND RENEWAL IN REACHING OUT**

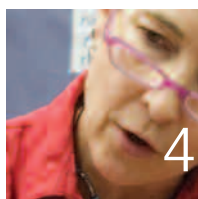
After 30 years as a Honeywell engineer, Tom Marshall shares his knowledge with young students visiting the Arizona Science Center. As a volunteer at the Science Center, he designs, develops the materials needed, and presents his own demonstrations and activities. The program is growing, and already has 10 high-powered volunteer science educators.

# Contents

2

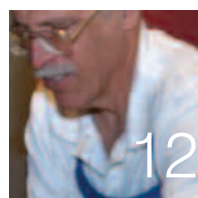
## **OF NOTE by Judy Jolley Mohraz**

As Piper Trust's grantmaking has evolved from strong individual grants to incorporate long-term multi-grant initiatives, *Piper Notebook* deserved a rebirth. This issue focuses on Piper's responses to a demographic tidal wave of older adults.



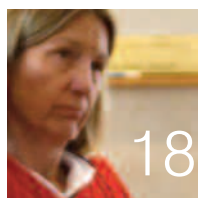
## **COVER STORY—Retirement (Re)Blooms: Creating a Maricopa Model for Living the Last Third of Life by John Beilenson**

During the 1960s, real estate developer Del Webb invented the contemporary notion of retirement in the Southwest. Today, a new conception of retirement is blossoming in the desert.



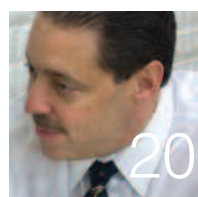
## **Encouraging Rewarding & Productive Activities**

The cornerstone of the Maricopa Model for Living the Last Third of Life is civic engagement—harnessing the power of these healthier, more active and involved older adults to benefit the community.



## **Promoting Peak Physical & Emotional Health**

Aging successfully involves functioning to the greatest extent possible—eating balanced meals to maintain strength and well-being, interacting socially to limit isolation and living right up to the end of life with dignity.



## **Preventing Disease & Disability**

Nothing is more central to Piper's strategy to prevent disease and disability among older adults than fall prevention. The risk of fall injury increases with age and it is the fifth leading cause of death in older adults.

22

## **GRANT NOTES**

Piper Trust reports grants awarded from January 1-March 31, 2008.

24

## **WORTH NOTING**

FAQs on Personalized Medicine; Piper Trust awards sabbaticals for professional development and renewal to five nonprofit leaders; HUD endorses Arizona Evaluation Project on Homelessness as national model.



# Of Note

BY JUDY JOLLEY MOHRAZ, Ph.D.  
President and CEO

## **Piper Notebook Returns**

When The Virginia G. Piper Charitable Trust opened its doors we never wanted to hear the complaint, “It’s a mystery how Piper makes decisions on what it funds.” With the aim of creating a culture of open communication, *Piper Notebook* made its debut in 2002 when the Trust announced its first cycle of grants.

The fledgling *Notebook* had three goals: to inform the community about our grantmaking; to highlight the impressive work of our grantees; and to provide as much clarity as possible about how Trust staff and trustees go about their work.

Later, an electronic newsletter became the principal Trust communication tool because it was timely, accessible and inexpensive. Some short snappy news items are best transmitted electronically. But we knew the Trust’s work and that of our grantees required more in-depth stories.

As our own grantmaking has evolved from strong individual grants to incorporate long-term initiatives that often include clusters of grants, the *Notebook* deserved a rebirth. Four issues of the *Notebook* will be published annually, one of which will be the annual report. Each *Notebook* will focus on a major area of the Trust’s grantmaking. The articles will probe the thinking that undergirds the initiatives and identify strategies the Trust



is drawing from the philanthropic toolbox to achieve progress. Grantees’ remarkable work will be highlighted as well as Trust news.

## **Responding to a Demographic Tidal Wave**

This issue focuses on the Trust’s responses to one of the great demographic shifts sweeping the nation—the increase in older adults—prompted by Americans living longer and also baby boomers turning 60 at the rate of 330 every hour.

Virginia Piper understood issues of older adults and tried to rally support to fund programs for what was then termed “the elderly,” at a time when public support was minimal. In fact, she called a meeting of affluent community leaders, a quarter of century ago, here in the Valley to organize financial support for programs addressing the needs of older residents.

Interestingly, her call to action was one of the rare occasions when a challenge from Virginia Piper did not prompt significant response and engagement. Perhaps, the limited response was human nature. Thinking about one’s own aging is not always uplifting and often more conveniently ignored. Possibly, it was the belief that programs for older adults were straight forward, representing few new ideas, and best addressed by individual families or nursing homes.

Times have changed. As the following stories indicate, older adults today represent a pool of talent and

community strength recognized by nonprofits, schools and businesses. Good health and independence last far longer today for older adults, and they want to continue to create lives of meaning and personal growth.

Four themes run through the Trust's work in the field of older adults that are constants in our grantmaking:

1. Prevention rather than crisis intervention.
2. Thinking nationally, acting locally.
3. Turning new models into established practice.
4. Forging partnerships locally and nationally.

The emphasis on prevention came out of the original community conversations Piper trustees held with nonprofit leaders before the Trust set its guidelines. The clear message was money came more easily to respond to crises. Funding was harder to attract for long-term preventive building blocks for a healthy community. We have never forgotten that message.

In many of the investments the Trust has made in this field, partnerships with national organizations are a hallmark. Carol Kratz, the Piper program director focused on older adult initiatives, has worked steadily to position Phoenix as one of the centers for national partnerships.

Civic Ventures, based in San Francisco, a leader in envisioning new models for libraries, civic centers and schools for retiring baby boomers, is our partner, mentor and resource.

The National Council of Aging is developing national networks of best practices and Maricopa County is one of the first demonstration sites.

The Mather café model, first introduced by the Mather LifeWays in Chicago, is now attracting national attention. These edgy, engaging centers are part of the Phoenix landscape, too.

Ensuring that great ideas and new models live beyond the Trust's grant is an essential goal of all of our work. The term used in the foundation world for this goal is sustainability, now familiar in so many spheres of global thinking. BenefitsCheckup.com is a superb example of

developing sustainability. This benefit information service is now funded by the state and all older adults in Arizona are able to use it. We are proud that we were a partner in that process.

Programs described in the stories in this issue are not simply about the Trust's efforts. They represent in so many instances powerful partnerships with local foundations, national foundations, the public sector and, of course, nonprofits. We all learn from one another as Maricopa County becomes a national laboratory for innovative programs for older adults.

In the spirit of Virginia Piper's own commitments, the Trust is working to ensure that this community not only supports older adults' aspirations but transforms institutions, as well, to help them realize their potential. We will all be the beneficiaries, whatever our age. \*

ENSURING THAT GREAT IDEAS AND NEW MODELS LIVE BEYOND THE TRUST'S GRANT IS AN ESSENTIAL GOAL OF ALL OF OUR WORK. THE TERM USED IN THE FOUNDATION WORLD FOR THIS GOAL IS SUSTAINABILITY, NOW FAMILIAR IN SO MANY SPHERES OF GLOBAL THINKING.



# Retirement

## **EXPERIENCE CORPS BRINGS BOOMERS INTO SCHOOLS**

Susan Harding likes the idea of helping students learn. Becoming a literacy tutor at Kerr Elementary School in Mesa was a great way for her to get to know the community and test the waters for her next steps, after moving to Arizona from Vancouver, Wash. She is part of the Mesa Experience Corps, which started in 2006 and now has 30 workers and volunteers to assist struggling students in eight Mesa elementary schools. Research has shown that fourth grade is a critical stage in deciding literacy and future educational success. The program focuses on reading and writing skills and helps increase self-esteem, as well. Mesa Experience Corps is a joint project of Mesa Community College, the Mesa Public Schools and Make A Difference. For more information, visit [www.makeadifference.org](http://www.makeadifference.org).

# (Re)Blooms

## Creating a Maricopa Model for Living the Last Third of Life

BY JOHN BEILENSON

During the 1960s, real estate developer Del Webb invented the contemporary notion of retirement in the Southwest beginning with Sun City. Webb's idea of the "golden years," a sunshine-infused period of rest and relaxation after an arduous working life, captured the public's imagination. Today, thanks to innovations from around the country and hard work among partners in Maricopa County, a new conception of retirement—along with associated programs and institutions—is blossoming in the desert.

Just as the first wave of the huge Baby Boom generation begins thinking about cashing its initial Social Security checks, a new look at later life is taking root all over Maricopa County. This re-visioning is more about rolling up one's sleeves than taking it easy, less about tuning out the rigors of the "real world," and more about using a lifetime of experience to make real contributions.

THIS RE-VISIONING IS MORE ABOUT ROLLING UP ONE'S SLEEVES THAN TAKING IT EASY, LESS ABOUT TUNING OUT THE RIGORS OF THE "REAL WORLD," AND MORE ABOUT USING A LIFETIME OF EXPERIENCE TO MAKE REAL CONTRIBUTIONS.

The first inkling of what some are now calling the "Maricopa Model" began back in 2001 when Carol Kratz, a brand-new program officer working for newly minted Piper Trust, traveled to the annual conference of Grantmakers in Aging. There, she first heard Marc Freedman, founder and president of the nonprofit Civic Ventures and author of *Prime Time: How Baby Boomers Will Revolutionize Retirement and Transform America*. Freedman rejected traditional views of aging and outlined a compelling vision of a large and growing number of "seasoned citizens" putting their energy, experience and talents to work in the service of communities across the nation.

"The good news is that the impulse toward a new kind of later life—one that is 'a new beginning'—does not appear confined to former CEOs, astronauts and presidents. Growing awareness among Americans that the third age is no longer a brief intermezzo between midlife and drastic decline (a recent study of boomers found that they consider 79 to be the onset of old age) is fueling a reexamination and redefinition among many of what it means to grow older," writes Freedman in his book.



This view of engaged, vital older adults synched well with what the Piper team gleaned from the landmark book, *Successful Aging*. Funded by The John D. and Catherine T. MacArthur Foundation, this longitudinal study involving thousands of older adults around the country, identified three fundamental pillars for what it takes to grow old well—avoid disease and disability, maintain high cognitive and physical function, and stay involved with life and living. This framework, recalls Kratz, “created our blueprint for moving forward.” Piper’s own research on older adults in Maricopa County further shaped this thinking toward promoting a positive, active view of later life. A 2002 survey reported that Phoenix’s older adults were doing fine. Actually a lot better than fine. Nine of 10 older residents said they were “satisfied” with their lives. Ninety-nine percent said they had the transportation they needed, and 95 percent could pay for their drug prescriptions. A relatively small and frail fraction (just over 3 percent) reported significant problems with daily activities like getting out of bed or showering.

### **A New Approach to the Old**

These statistical learnings served to cement Piper’s approach to older adults, not as a population in desperate need, but as a group with significant, if under-recognized, abilities and assets. Since it began grantmaking for older adults in 2002, Piper Trust has made investments totaling more than \$23 million in three main areas: promoting social connection through rewarding and productive activities, preventing disease and disability, and encouraging peak physical and emotional health.

To these ends, Piper Trust has supported a developing array of initiatives designed to enable Maricopa County’s vibrant older adults to continue to age successfully and most important, to continue to be active, contributing members of their families and communities. Together, this work has begun to create a constellation of programs, services and opportunities that let older adults make the most of the last third of life.

### **Getting Connected**

Perhaps the most ambitious commitment to older adults has been a focus on civic engagement. From the outset,

Civic Ventures has been a strong national partner in this work of promoting opportunities and other modes of community participation for older-adult volunteers and those who seek paid work, as well.

“There is a role for every sector in fulfilling the aging opportunity and making America a good place to grow older, a place where third-agers remain a vital and contributing part of society,” writes Freedman in *Prime Time*.

One key investment in this area launched a series of Next Chapter centers, set in libraries and community colleges where adults over 55 connect with one another and identify opportunities to reflect on their lives and passions, plan their next phase, and ultimately take on leadership roles that make a meaningful difference in Maricopa County.

Piper Trust also has sponsored two Experience Corps projects in Tempe and Mesa (see photo story, page 4). This program enables older people to be a consistent

presence in fourth grade classrooms, where struggling students are gaining skills and self-confidence. Complementing this work, the National Council on Aging and 10 local nonprofits with Piper support have begun a new initiative called “Maricopa Models of Significant

Service” (see pages 14-15). This initiative is training groups like Big Brothers Big Sisters of Central Arizona, Interfaith Community Care, Mesa United Way and others in best practices around recruiting, preparing and deploying older experienced workers and volunteers effectively.

Finally, an exciting partnership with GateWay Community College is launching a Workforce Transition Center (see photo story, page 8). This project will connect the growing number of boomers seeking what Freedman has called “encore” careers and paid jobs in public service with healthcare, education and social services agencies confronting acute personnel shortages. It is the proverbial win-win. “There is a real need out there,” reports GateWay President Eugene Giovannini, Ed.D. “We are focusing on the nonprofit sector, but we are already getting calls from the private sector, which is experiencing the same kind of brain drain.”

PIPER TRUST HAS MADE INVESTMENTS TOTALING MORE THAN \$23 MILLION IN THREE MAIN AREAS: PROMOTING SOCIAL CONNECTION THROUGH REWARDING AND PRODUCTIVE ACTIVITIES, PREVENTING DISEASE AND DISABILITY, AND ENCOURAGING PEAK PHYSICAL AND EMOTIONAL HEALTH.





**WELLNESS PROGRAMMING INCREASES PHYSICAL CAPACITY**

Rejuvenating lost energy. Gaining strength. Maintaining balance. Building overall health. Growing an overall sense of well-being. One font of all these good things is the Abundant Life Wellness Program at Good Shepherd Villa, a 14-acre campus in Mesa that includes a healthcare center, senior apartments, assisted living and skilled care units. Jason Wright (pictured here) works with a client on weight training to increase upper-body strength. Wellness classes, available to Villa residents as well as older adults in the surrounding neighborhood, are approachable, motivating and fun.

Program participants first complete a fitness assessment to identify their individual strengths and weaknesses in specific areas directly related to the ability to perform daily activities.

Results are used to devise specific exercise programs to work on areas where individuals have increased risk for future disability. For more information, contact Jason Wright at 480.981.0098.





## **RE-CAREERING TAKES OFF AT GATEWAY COMMUNITY COLLEGE**

Boomers who want to change careers for meaningful work in healthcare, education and social services will find help at the Workforce Transition Center at GateWay Community College, Phoenix. The center will prepare employees for these industries and assist employers in developing recruitment strategies for hiring boomers. The first educational segment of the GateWay re-careering model is a Home Health Aide class. The non-credit course teaches non-medical home care to assist frail elderly and people with disabilities with activities of daily living (ADL)—everything from bathing and dressing to eating and exercise. Assisted living care professional Susan Kilby (right) teaches students Maggie Fernandez (seated) and Shirley Walker the proper way to make a wheelchair to chair transfer. Kilby works for the Foundation for Senior Living, which routinely hires trainees including Shirley and Maggie. For more information, contact Workforce Transition program director Jan Davie at [jan.davie@gwmail.maricopa.edu](mailto:jan.davie@gwmail.maricopa.edu).

Looking at this body of work on civic engagement since 2001, Freedman notes that one of the things that has distinguished Piper Trust's approach is its willingness to stay on task. "[Piper] has had the patience required for building new and enduring kinds of institutions" for older adults, he says. "It is no drive-by arrangement."

### Promoting Health and Well Being

In the disease and disability prevention arena, Piper Trust funded early grants to the University of Arizona Cooperative Extension Service and Good Shepherd Villa (see photo story, page 7) for wellness and exercise programming. More recently, Piper partnered with the City of Phoenix and made subsequent investments in the Rebuilding Together home modification program and Valley Christian Center's fall prevention program in South Phoenix (see photo story, page 21). These grants are creating and testing innovative models that can forestall hip and other bone fractures—debilitating, life-changing events that can be the difference between self-sufficiency in the community and institutional care.

To encourage peak physical and emotional health, Piper Trust has sought state-of-the-art programming from around the country and engaged local and state government in innovative ways to provide the best available health and particularly social services to local residents.

For example, Piper connected early on with Mather LifeWays, a Chicago-based organization with 60 years of experience developing programs for older adults. Through an initiative designed to help transform local senior centers—a key source of social and health programming and meals for older adults—Piper Trust invited Mather staff to Phoenix. Here, they conducted training workshops to explain and demonstrate the ins and outs of Mather's unique café model, which creates 21st Century meal programs for older adults in a restaurant-like atmosphere. Today, Piper Trust and the Maricopa County Area Agency on Aging are launching two café projects at senior centers in Phoenix and Gilbert. Another Piper-supported café at Interfaith Community Care is under construction in Surprise.

TO ENCOURAGE PEAK PHYSICAL AND EMOTIONAL HEALTH, PIPER TRUST HAS SOUGHT STATE-OF-THE-ART PROGRAMMING FROM AROUND THE COUNTRY AND ENGAGED LOCAL AND STATE GOVERNMENT IN INNOVATIVE WAYS TO PROVIDE THE BEST AVAILABLE HEALTH AND PARTICULARLY SOCIAL SERVICES TO LOCAL RESIDENTS.

### Boomers by the Numbers

Boomers, the post-World War II generation born between 1946 and 1964, represented a marked increase in the number of births in the United States. Today, the oldest boomers are 62 and the youngest 44. Here are figures about the Baby Boom generation compiled by the U.S. Department of Health and Human Services and U.S. Census Bureau, as well as some numbers extrapolated for Arizona and Maricopa County:

**330**

The number of boomers in the U.S. turning 60 every hour.

**900,000**

Estimated number of baby boomers in Maricopa County in 2008.

**22%**

The projected percentage of people over 60 in Maricopa County in 2030. With an estimated population of 6 million that year, 1.32 million will be over 60.

**5%**

National percentage in 1947 of adults over 25 with at least a bachelor's degree. In 2004, 28 percent of the same age group had earned bachelor's degrees.

**5%**

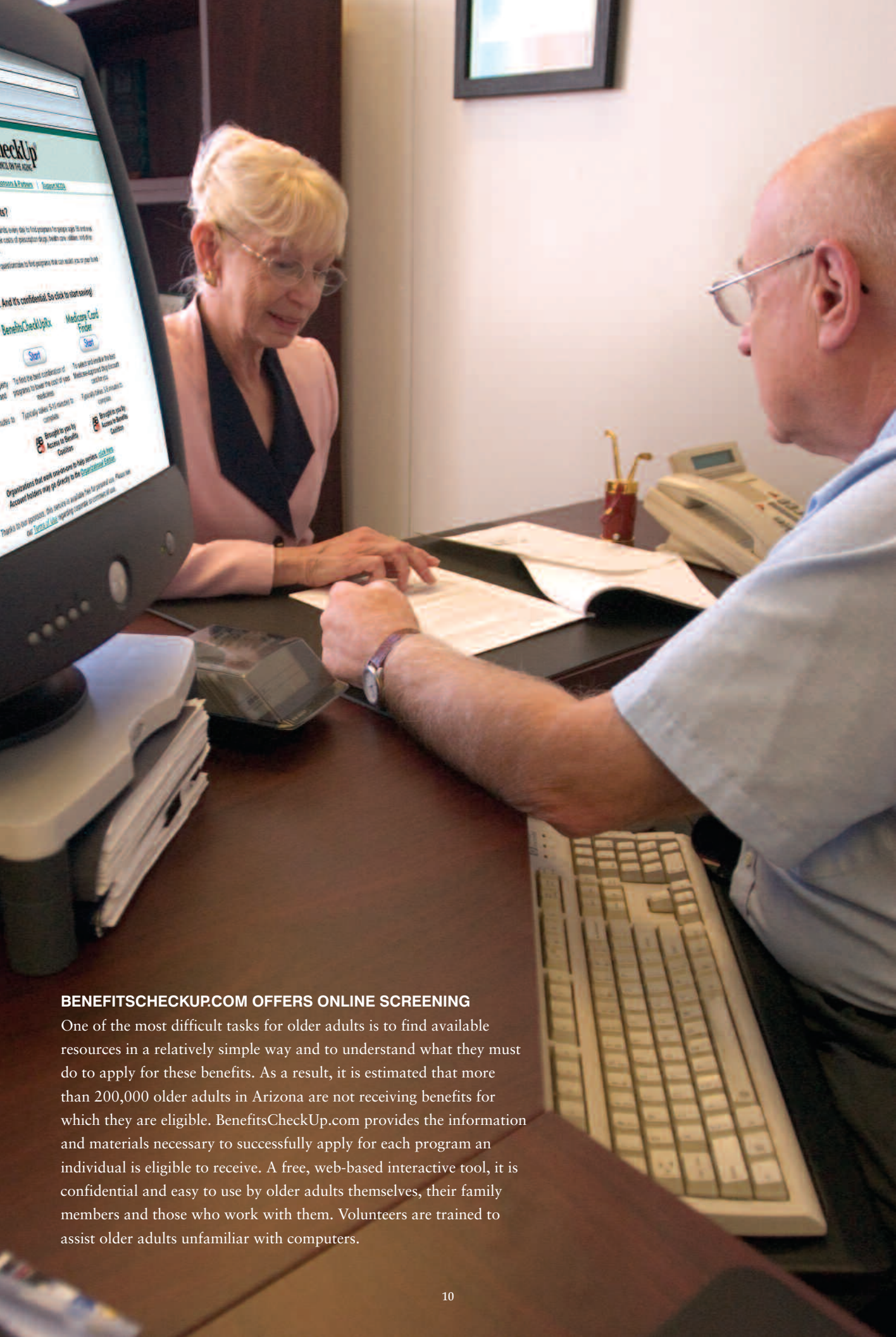
Number of people requiring nursing home care at some point in their lives.

### Working Together

Collaboration has been an important theme throughout. In 2003, Piper supported a local pilot of BenefitsCheckUp.com. This innovative online program, developed by the National Council on Aging, helps older adults access the millions of dollars in federal, state and local government health and other benefits they deserve but often don't receive (see photo story, page 10).

Launched with complementary funding from St. Luke's Health Initiatives and the BHHS Legacy Foundation, the project was so successful that Arizona Governor Janet Napolitano made it available to older adults throughout the state (it is now a state-run program). This effort in turn encouraged the Governor to expand her concern for aging issues, establishing an





### **BENEFITSCHECKUP.COM OFFERS ONLINE SCREENING**

One of the most difficult tasks for older adults is to find available resources in a relatively simple way and to understand what they must do to apply for these benefits. As a result, it is estimated that more than 200,000 older adults in Arizona are not receiving benefits for which they are eligible. BenefitsCheckUp.com provides the information and materials necessary to successfully apply for each program an individual is eligible to receive. A free, web-based interactive tool, it is confidential and easy to use by older adults themselves, their family members and those who work with them. Volunteers are trained to assist older adults unfamiliar with computers.

“THE MENTALITY USED TO BE THAT YOU RETIRED ON A FRIDAY AND ENTERED THE NURSING HOME ON MONDAY—YOUR USEFUL LIFE WAS OVER. WITH HELP FROM OUR PARTNERS IN MARICOPA COUNTY AND OTHERS ACROSS THE COUNTRY, WE ARE THINKING ABOUT THIS DIFFERENTLY, BUILDING SOMETHING NEW AND REALLY NEEDED.”  
CAROL KRATZ, PIPER TRUST

aging policy advisor post, and more recently a Governor’s Office on Aging, now headed by Executive Director Melanie Starns.

“We meet with Piper regularly and think big thoughts,” says Starns. “They are a Maricopa laboratory for new ideas, and we have the ability to translate what is working statewide and to share what we’re doing with other states around the country.”

Piper Trust is indeed thinking about nothing less than creating a whole new look at later life, along with the new institutional arrangements to make it possible. “The mentality used to be that you retired on a Friday and entered the nursing home on Monday—your useful life was over,” says Kratz. “With help from our partners in Maricopa County and others across the country, we are thinking about this differently, building something new and really needed.” \*

**ABOUT THE AUTHOR:**

**JOHN BEILENSEN** founded Strategic Communications & Planning in New York City in 1987. He has led the company since then, providing consulting, editorial and training services to a wide range of nonprofit organizations and public institutions. He has written 18 books for Peter Pauper Press, including his latest, *The Future Me: Authoring the Second Half of Your Life*, an interactive journal for people considering retirement and other transitions in later life.

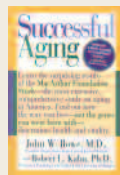
**REFERENCES**



*Encore: Finding Work that Matters in the Second Half of Life.* Marc Freedman, founder of Civic Ventures and Co-Founder of The Purpose Prize and Experience Corps. *PublicAffairs*, 260 pages, 2007.

ISBN-13: 978-1-58648-483-5. A follow-on book to *Prime Time: How Baby Boomers Will Revolutionize Retirement and Transform America*, which introduced readers to boomers making the most of the last third of life. *Encore* tells the stories of re-careering pioneers who have found a calling in finding important work beyond themselves.

*The Mature Mind: The Positive Power of the Aging Brain.* Gene D. Cohen, M.D., Ph.D. Basic Books, 232 pages, 2005. ISBN-13: 978-0-465-01203-9. Cohen, a psychiatrist and gerontologist, provides a look at the psychology of later life that turns common thinking on its head. He contends that the mind can grow, change and build brain reserves at any age. Adding to concepts presented in his earlier book, *The Creative Age: Awakening Human Potential in the Second Half of Life*, he notes that in the later stages of life, 60-80, the brain can achieve its greatest depth and reach.



*Successful Aging.* John W. Rowe, M.D., and Robert L. Kahn, Ph.D. Dell Publishing, 265 pages, 1998. ISBN: 0-440-50863-0. The groundbreaking book, based on 10 years of research funded by The John

D. and Catherine T. MacArthur Foundation, which has helped popularize the concept that aging does not have to be synonymous with debilitating illness and decline. Successful aging results from three components: lowering risk of disease and disability, maintaining mental and physical function and remaining actively engaged in life.

**OTHER RESOURCES**

*Attention Boomers: Change the World ... Again!* A Toolkit to Meaningful Volunteering. *The Renaissance 50Plus Project* funded by Ontario Ministry of Citizenship and Immigration, 8 pages. Download at [www.renaissance50plus.ca](http://www.renaissance50plus.ca). A handy guide for boomers and agencies interested in attracting boomer volunteers.

*Boomers Are Ready for Nonprofits But Are Nonprofits Ready for Them?* Jill Casner-Lotto. *The Conference Board*, June 2007, 47 pages. Download at [www.conference-board.org/publications](http://www.conference-board.org/publications). Research report focuses on the impact anticipated boomer retirements will have on the nonprofit sector in coming years.

*From the Age of Aquarius to the Age of Responsibility: Baby Boomers Approach 60.* A Social Trends Report, Pew Research Center, 44 pages, 2005. Download at [pewresearch.org/pubs/306/baby-boomers-from-the-age-of-aquarius-to-the-age-of-responsibility](http://pewresearch.org/pubs/306/baby-boomers-from-the-age-of-aquarius-to-the-age-of-responsibility). Nation’s 75 million boomers are stuck in an extended “sandwich” phase of supporting children and aging parents.

*Keeping Baby Boomers Volunteering: A Research Brief on Volunteer Retention and Turnover.* Corporation for National & Community Service, 24 pages, March 2007. Download at [national.service.gov/pdf/07\\_0307\\_boomer\\_report.pdf](http://national.service.gov/pdf/07_0307_boomer_report.pdf). Report delineates that nonprofit groups must revision volunteer roles to attract vast boomer resource.

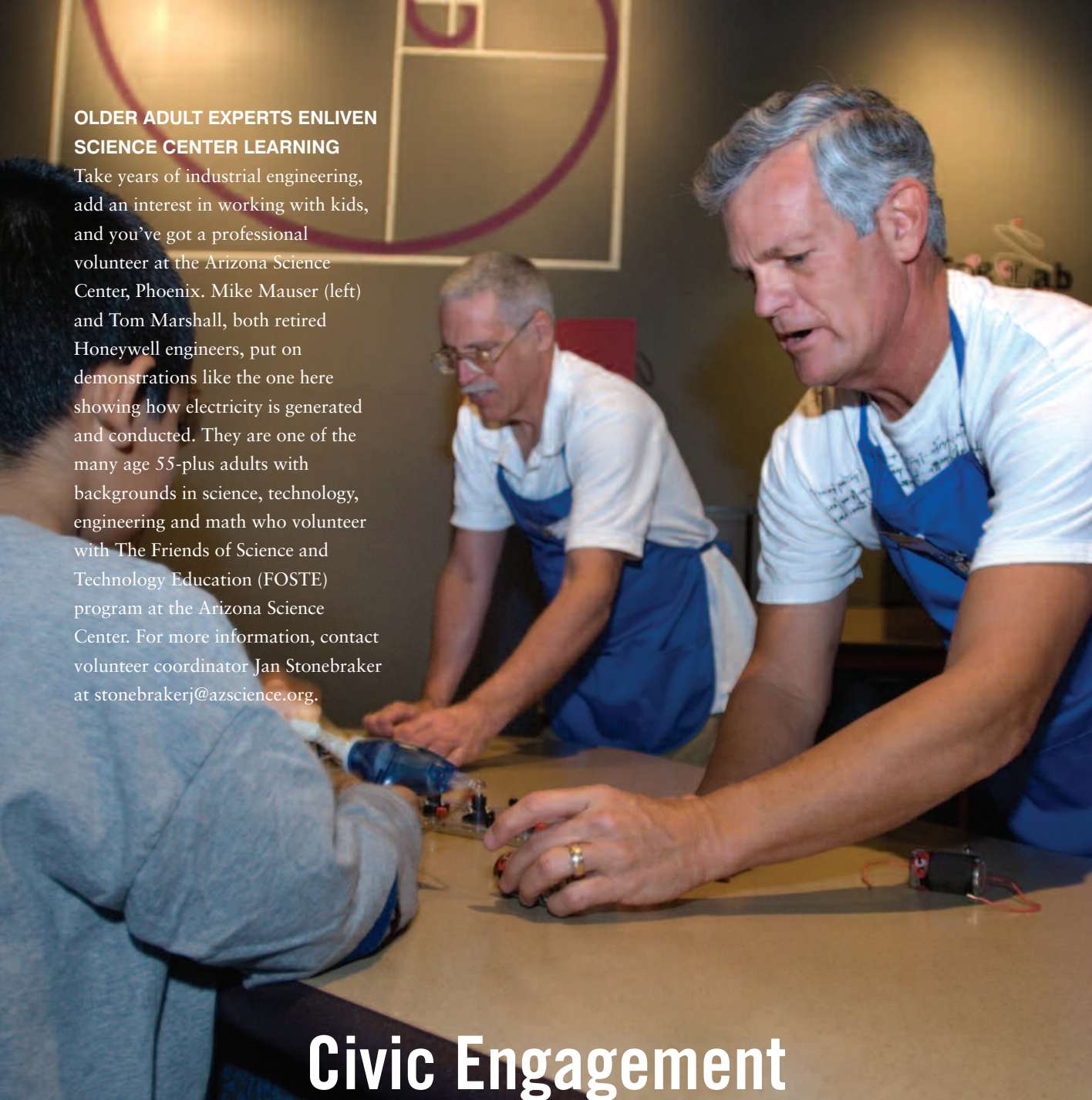


*A Golden Opportunity: Recruiting Baby Boomers into Government.* Partnership for Public Service, 32 pages, January 2008. Download at [www.ourpublicservice.org/OPS/publications](http://www.ourpublicservice.org/OPS/publications). The partnership’s pilot program with federal agencies, corporate partners and advocacy groups applies research insights to match older candidates with meaningful positions.



## OLDER ADULT EXPERTS ENLIVEN SCIENCE CENTER LEARNING

Take years of industrial engineering, add an interest in working with kids, and you've got a professional volunteer at the Arizona Science Center, Phoenix. Mike Mauser (left) and Tom Marshall, both retired Honeywell engineers, put on demonstrations like the one here showing how electricity is generated and conducted. They are one of the many age 55-plus adults with backgrounds in science, technology, engineering and math who volunteer with The Friends of Science and Technology Education (FOSTE) program at the Arizona Science Center. For more information, contact volunteer coordinator Jan Stonebraker at [stonebrakerj@azscience.org](mailto:stonebrakerj@azscience.org).



# Civic Engagement

## Encouraging Rewarding & Productive Activities

Increasing numbers of older adults have better health, greater resources and more time than their elders in the past. In particular, boomers born between 1946 and 1964 see more and better options than their parents did. Social Security was launched in 1935 at a time when just half of the U.S. population lived to age 65. At typical retirement age today, most people will be facing another 20 to 30 years of productive life after retirement. And this emerging group does not see themselves living in retirement for the duration. They want leisure time, yes, but they also want to choose activities that bring fulfillment and purpose.

The cornerstone of the Maricopa Model for Living the Last Third of Life is civic engagement—harnessing the power of these healthier, more active and involved individuals to benefit the community. This new approach suggests providing places for older adults to gather, converse, learn and identify work and volunteer opportunities.

Working with Libraries for the Future at the outset and with Civic Ventures from the beginning and as an ongoing partner, Piper Trust has helped launch several initiatives related to providing opportunities to make purposeful contributions to the communities of Maricopa County:



## NEXT CHAPTER CENTERS

Next Chapter centers, part of Civic Ventures' Life Options project, capitalize on the wealth of experience, time and talent of retired people or those nearing retirement desiring to contribute in a meaningful way to their communities. These centers offer a designated space for people to learn about community volunteer, work and educational opportunities and to link to supportive services, employment opportunities and wellness information. The four Next Chapter centers operating in Maricopa County are *Boomerang* in Chandler, *Boomerz* in Scottsdale, *Life Options* in Mesa and *Tempe Connections* in Tempe (see photo story, page 16).

## EXPERIENCE CORPS

Mesa Life Options and Tempe Connections, two of the Next Chapter centers, also have implemented Experience Corps in their community elementary schools. The centers become a recruiting ground for identifying older adults to work with children who are not yet confident readers. The goal is to provide structured service opportunities, some paid and some volunteer, where older adults can impact the lives of children. In the Mesa

Public Schools, 30 Corps tutors are working in three elementary schools to make a measurable difference in 200 children's reading scores on standardized tests (see photo story, page 4). In the Tempe Public Schools, the early literacy program places tutors in four elementary schools to help kindergarten through third grade students improve their reading and writing.

## WORKFORCE TRANSITION

The first re-careering program is the Workforce Transition Center at GateWay Community College (see photo story, page 8), where training modules for boomers who want to enter fields experiencing severe workforce shortages, such as healthcare, education and social services, are in development. The new model has three parts: assisting boomers' transition into employment that reflects their desire to do meaningful work but on a more flexible or project-based schedule; helping potential employers develop new practices in recruiting, hiring and scheduling this age group; and providing help to boomers seeking civic engagement and volunteer opportunities rather than employment.

## MARICOPA MODELS OF SIGNIFICANT SERVICE

Over the past few years, it has become clear that most nonprofit agencies are not prepared for the boomer-type of volunteer or the older worker who wants episodic or project-based work. Attracting and then utilizing the special skills and talents of boomers is different from the requirements of prior generations. The new model identified promising projects at 10 nonprofits, the Maricopa Models of Significant Service (see pages 14-15). The National Council on Aging provides ongoing training and consultation through webinars and learning circles during the two-year initiative.

## EXPERIENCE MATTERS

The next step in Encouraging Rewarding & Productive Activities is knitting together this work with state and local governments, foundations and the many nonprofit agencies involved to ensure knowledge-sharing, learning and cohesive efforts going forward. Civic Ventures, the national nonprofit agency that helped Piper Trust begin these civic engagement initiatives, is conducting research, analysis and planning about next steps. The goal is to embed this work in local organizations to sustain the efforts. The year-long process includes convening and workshops, appointing a 15-member task force and identifying gaps in services and potential funding opportunities. \*

## Participation in Activities by the Numbers

Here are figures about the participation of people 65 and older in rewarding and productive activities, taken from Center for Home Care Policy and Research Visiting Nurse Survey in Maricopa County, 2002; the U.S. Bureau of Labor Statistics, 2007, and a Merrill Lynch survey on retirement:

### 65-74

Age group over 65 most likely to volunteer in Maricopa County. Most volunteers are at least 200 percent above the poverty line, have more than a high school education, have no physical activity limitations and are in excellent, very good or good health.

### 10

Number of hours spent per week volunteering in Maricopa County by a significant 20 percent of those over 65.

### 76%

Percentage of boomers in Maricopa County intending to keep working and earning in retirement beyond 65.

### 42%

Percentage of boomers intending to "cycle" between periods of work and leisure. Only 17 percent of boomers hope to never work for pay again.

# Demonstration projects in Maricopa County target boomers' experience

## MARICOPA MODELS OF SIGNIFICANT SERVICE

More nonprofits are beginning to look at the Baby Boom generation for their potential assets: time, experience and renewed interest in service. In fact, this aging group is an enormous pool of highly skilled workers and volunteers.

RespectAbility, a program of the National Council on Aging, together with The Virginia G. Piper Charitable Trust, selected 10 demonstration projects in Maricopa County to develop entrepreneurial models to attract adults over 55 to fill important nonprofit leadership roles.

These “Maricopa Models of Significant Service” each received \$40,000 grants to implement model programs. Over the two-year grant period, the nonprofit partners will engage in designing best practices, as well as learning from each other and from experts in the field. Here are the winning programs:



**VOLUNTEER BETTY JANIK DEMONSTRATES THE FUNCTIONS OF THE HUMAN HEART AT THE ARIZONA SCIENCE CENTER.**

### **Arizona Science Center: Friends of Science and Technology Education**

Boomer teachers, engineers and technology experts are an important source of new volunteers to create and



present hands-on activities that enhance the educational value of Arizona Science Center exhibitions. They research exhibit and program contents, provide unique experiences for visitors and help inspire the next generation of teachers, scientists and engineers.

### **Beatitudes Center DOAR: New Volunteer Leadership Structure**

Beatitudes brings more than 150 congregations of various faiths together to serve homebound elders, adults with disabilities and grandparents raising grandchildren. The new project defines and promotes leadership roles for over age-55 volunteers across the organization—from outreach liaisons, to home repair coordinators, to mentors and training facilitators.

### **Big Brothers Big Sisters of Central Arizona: The Big Experience Project**

Big Brothers Big Sisters is reaching more children by partnering with local businesses as a source for volunteer mentors. The Big Experience Project will provide even more older-adult mentors by linking additional corporate retiree groups with specific schools. Site coordinators representing each company will increase school-business matches from 250 to 750.

### **Friends of the Tempe Library: Talent Connection**

Tempe Connections, a Next Chapter project, will implement a model, linking the talent and experience of age 50-plus adults with nonprofit and public sector volunteer and stipend opportunities. The Talent Connection raises awareness among various local agencies of the value of older-adult contributions, identifies positions and projects and recruits skilled adults.



### **Hacienda HealthCare:**

#### **Nurse-Mentor Volunteer Model**

The new nurse-mentor model will recruit and cultivate retired registered nurses, ages 55 and older, to mentor new nursing graduates hired by Hacienda HealthCare. This innovative approach helps address the current nursing shortage and raises the quality of care new RNs can provide to Hacienda's patients—chronically ill infants, children and adolescents.

### **Interfaith Community Care:**

#### **The PEER+ Program**

Interfaith's new Surprise campus is expanding services in the community for successful aging with three social enterprises—a café, bookstore and child development center. The Purposeful Enterprise Empowering Retirees Program (PEER+) will create business plans for staffing these operations with boomers who have experience in catering and event planning, marketing and sales, and child care.

### **Mesa Arts and Culture Department: The Ubuntu Project**

*Ubuntu*, the Zulu maxim meaning “I am, because we are,” is the umbrella for three Mesa arts venues to integrate diversity into all leadership, staff and volunteer opportunities. The Arizona Museum for Youth, the Mesa Arts Center and the Mesa Southwest Museum will implement six institutional diversity projects, drawing on older-adult Ability Experts and 50 project-based volunteers from diverse communities.

### **Mesa United Way:**

#### **The Partnership Committee**

How does an agency engage former donors and community leaders? Mesa United Way intends to do just that by establishing The Partnership Committee of leaders 55 and older to serve as senior advisors on how to address community needs and changing conditions and a clearinghouse for identifying community organizations that can lead to positive change.

### **Sun Health Corporation:**

#### **Supervised Volunteer/Leader Team**

Sun Health's new volunteer model draws on current research that baby boomers are looking for opportunities of significance and impact. Besides defining new avenues in volunteering, the project will enhance recruitment activities, creating a new electronic recruitment tool, placing recruitment kiosks in the community and recruiting from local employers.

### **The Centers for Habilitation:**

#### **Volunteer Leadership Teams**

As an agency serving people with disabilities and their families, The Centers for Habilitation will form teams of retired and semi-retired professionals across many industries to provide employee development opportunities and mentoring to service recipients. The volunteers help mentees achieve their career goals as they work toward independence and quality of life. \*



# Something You Can Never Get Back—Time

## A NEXT CHAPTER STORY

---



### **NEXT CHAPTER SITE IN TEMPE LIBRARY OFFERS SOURCE FOR RENEWAL**

The Tempe Public Library is the quintessential emerging new site for older adults wanting to add more possibilities in their lives. This Next Chapter center, called Tempe Connections, offers a café with inviting spaces for getting together, classes for learning about interesting topics and online resources to promote volunteer and paid-work opportunities. Tempe Experience Corps, headquartered at the center, offers paid and unpaid opportunities to tutor in the Tempe public schools. Tempe's programs stem from a policy adopted by the Tempe City Council and Mayor to provide for expanded services for older adults. For more information, contact program director Rebecca Bond at Friends of the Tempe Library, 480.350.5599.



**BY WENDY RESNIK**

Advisory Board Member, Tempe Connections

*Editor's note: This story was written by the Tempe Connections team in preparation for an Andy Goodman Piper Academy on Storytelling in 2005. The story speaks for itself on the value of giving back—particularly for experienced older adults.*



Retired from a 30-year career as an engineer and manager with the Salt River Project in Phoenix, 58-year-old Jack Cunningham had one hobby—judo. He had taken it up in college. When he retired, the trim, balding black belt had more time for practice and even started teaching an adult judo class at the rec center once a week. His wife, Pam, tried to keep him busy with household repairs, but it wasn't enough. He had a vague, gnawing sense of something missing in his life.

One day, before judo class, Jack stopped in at the Tempe Library to pick up a book and check out the new café he'd read about in the newspaper. As he was getting a coffee, he started chatting with a neatly dressed older woman named Betty, whose nametag identified her as "Concierge."

"Excuse me for asking, Betty, but what's a concierge doing in a library? Shouldn't you be in some fancy hotel?" asked Jack. As they sipped lattes, Betty explained the concept of the new Tempe Connections program that had brought the café, dozens of new classes and an army of volunteer "concierges" to the library. "Okay, so it's for old farts like me. We come to take a class and then have a cup of coffee, is that it?" asked Jack.

**Connecting the Dots**

"It's more than that, Jack," answered Betty. "It's about meeting people and getting involved. I answer questions, but I also try to put people together, help them connect the dots. People stop in for a coffee, they come back for a class; next thing you know, they're getting involved and volunteering, just like me!"

Just then Jack's neighbor, Hal, strolled over. "Better watch out, Jack," he joked, "Once she gets her hands on you, you'll be here for good. Betty roped me in two months ago, now she's got me teaching these investment classes for older adults. You know ... balanced portfolios, how to read ValueLine ... that kind of stuff."

"Fine for you, Hal," retorted Jack, "you were a broker. What am I going to teach, structural engineering?"

It was a prophetic moment. Next thing Jack knew he was facing a dozen at-risk teenagers in judo uniforms. They also had Mohawk haircuts, tattoos and various piercings; it looked like a rough crowd. "What is the one thing you can never get back?" he started. Jack's question was answered by blank stares, some lewd suggestions and a lot of snickering. "Time," he said. "Time is the one thing you can never get back. And that's why we are going to use our time together wisely. At our next class, you will be dressed appropriately and standing at your mats ready to start."

**Lead by Example**

They were skeptical at first, as adolescents are. None more so than Frankie. Frankie had no role models, he barely had a family. No father, Mom was a crack addict. Frankie was living with his grandmother. He had attended four schools in the past three years and was on probation for vandalism. He'd had enough of do-gooder social workers telling him what to do. But Jack wasn't like that. Jack didn't preach. He was passionate about judo and about discipline in the class, but he didn't tell them how to live their lives. Instead, he led by example. He didn't tell the kids they had to bow at the mat to show respect, but they saw him do it and they began to copy him.

Frankie quickly earned his yellow belt. He practiced religiously and was Jack's best student. When he spent a month in Juvenile Detention for violating his parole, Jack came to visit and presented Frankie with the orange belt he had earned. Frankie was both embarrassed and touched. Jack made no mention of the failed breathalyzer test that had landed Frankie in Detention. Instead, he spoke about a regional judo tournament in three months' time. There would be a Junior Men's event and he thought Frankie was ready; that is, if he was interested.

Frankie worked hard for a medal. It was his first award and wouldn't be his last. And Jack has continued to give the most precious gift of all—his time. \*



## UNIQUE PROGRAM TEACHES THE ART OF DEATH TO HEALTHCARE PROFESSIONALS

End-of-life care is different from typical medicine. The management of pain and other symptoms and required social, psychological, cultural, emotional and spiritual supports for patients, family and caregivers, all require special palliative care skills not routinely covered in medical education. Hospice of the Valley in Phoenix, the largest free-standing hospice in the country, started an innovative program in 2006 to train all family practice and internal medicine residents at the seven Maricopa County teaching hospitals in palliative and end-of-life care. Administrative medical director Gillian Hamilton, M.D., Ph.D. (center), works with an average of 12 students each month in a hands-on approach where students get a first-hand look at the program's services, including the use of pet therapy as seen here. This experiential training program has been expanded to nurses as well as social workers and chaplains who also are members of the inter-disciplinary palliative medicine team. For more information, go to [www.hov.org](http://www.hov.org).

## Customer Focus

### Promote Peak Physical & Emotional Health

Aging successfully involves functioning to the greatest extent possible to the end of life. Eating balanced meals to maintain strength and well-being. Interacting socially to limit isolation and depression. Aging in place, which can mean staying in the family home or living independently as long as possible. And living right up to the end with dignity.

In devising a strategy to promote peak physical and emotional health among older adults, Piper Trust looked for innovative ways to deliver services that achieve these holistic objectives. Trust-funded initiatives range from revamping senior centers to make them more customer-focused, to helping family caregivers cope with the challenges of keeping aging adults at home, to expanding quality of life with available federal and state benefit programs and training health professionals to better understand patient and family wishes at the end of life.

### TRANSFORMING SENIOR CENTERS

The old senior center model was congregate dining, games and cards. The times are indeed changing. Instead of meal of the day and bingo, the trend is toward restaurant-like dining, educational opportunities such as computer courses, fitness programs and health checks and myriad opportunities to take care of one's own well-being.

Influential in these developments is Mather LifeWays, a Chicago-based senior services organization that has pioneered dining, activity and fitness venues. Unlike the old institutional model with no choice in food options or times to eat, the new Mather café model offers a menu of food selections, salad bars, coffee carts and take-home options, as well extended meal times. The award-winning concept helps reach a larger population of older adults—not just those who can afford private living and dining services—stay healthy, independent and engaged in the



world. A point of sale system allows the use of debit-type cards, satisfying federal Older American Act requirements and providing a more dignified way for older adults to pay for meals.

Beginning with Mather workshops, Piper Trust helped introduce the Mather model to Maricopa County, partnering with the Area Agency on Aging for implementation. Three projects are in the works: the new Interfaith Community Care project in Surprise with a café component is under construction; two other café projects are moving forward, one supported by Piper Trust for Community Services of Arizona at the Gilbert Community Center and another by the Area Agency in Phoenix; other projects are planned but not yet ready to implement.

Mather LifeWays also devised a model providing resources and support information for caregivers coping with caring for older adults. Piper Trust brought “Powerful Tools for Caregivers” to the community. The project is now funded by Area Agency on Aging.

## **BENEFITSCHECKUP.COM**

Older adults often are eligible for more federal and state benefits than they use. They may not know they are eligible for benefits, such as food stamps, for example. BenefitsCheckUp.com, a project of the National Council on Aging, offers a free, web-based interactive tool for older adults themselves and their families that can help keep older adults living independently. A customized version for agencies and organizations that work with older adults is available to help them identify benefits for clients. Volunteers assist older adults uncomfortable with computers, and a Spanish language version of the site expands the program’s reach. (See photo story, page 10.)

Piper Trust introduced the program to Arizona in cooperation with the BHHS Legacy Foundation and St. Luke’s Health Initiatives. At the same time, additional funding helped underwrite the Governor’s Policy Advisor on Aging, a new leadership position. After a successful launch in Maricopa and other major counties, BenefitsCheckUp.com was made available statewide. The program is now managed and operated by the state of Arizona.

## **PALLIATIVE AND END-OF-LIFE PROFESSIONAL EDUCATION**

What started as a “what if” conversation with Piper staff in a hallway of a new outpatient hospice turned into a full-fledged program unique in the country for training medical professionals about the art and science of caring for dying patients. The conversation with Hospice of the Valley medical personnel was about the need for training healthcare providers about special patient and family needs at the end of life. Piper Trust funded the development of web-based educational materials and hands-on experiences for medical residents. A program for experienced nurses followed.

More recently, the program has expanded to other members of the healthcare team—social workers and chaplains.

The resident program includes half-day sessions: an orientation about palliative medicine, pain management and advance directives, a visit to a dementia unit observing medication and non-medication techniques for managing dementia and in-person discussion with a Hospice medical director, nurse, social worker and chaplain. Pre- and post-training test scores show improvements of up to nearly 60 percent in awareness of best clinical practices in managing agitation in dementia and pain management, for example.

As one resident reported after completing the program: “It’s so strange that many times we think that we are making the best decision for the patient but are completely oblivious to the point that it is against the patient’s wish. I think I can have more open and fruitful family meetings from now on.” \* \*

## **Older Adult Health by the Numbers**

Here are Maricopa County and Arizona health stats about the population 65 and older from the Centers for Disease Control and Prevention, Center for Home Care Policy and Maricopa County Research Visiting Nurse Survey, 2002:

**27%**

Percentage of adults over 65 in Arizona consuming five or more servings of fruit and vegetables a day. Forty percent of boomers reports eating five or more servings.

**86%**

Number of adults over 65 having a physical exam in previous year.

**68%**

Number of adults over 65 having a flu shot in the past year.

**77%**

Percentage of adults over 65 who report knowing whether palliative care services are available and where in Maricopa County.

# Fall Prevention

## Prevent Disease & Disability

In serving the older population, much of the focus used to be on serving frail elderly to provide assistance as this population became more fragile and unable to perform necessary daily activities. Now, as scientific research has accumulated on the positive impact of promoting wellness on physical health, more attention is being paid to keeping people from becoming ill—good nutrition, physical exercise and healthy habits to help older adults remain in better physical and mental condition over time.

Nothing is more central to Piper’s strategy to prevent disease and disability among older adults than fall prevention. The risk of fall injury increases with age and it is the fifth leading cause of death in older adults. The majority of falls can be prevented through proven methods: risk assessment, home modifications, follow-up by homecare practitioners, medication management and routine exercise and strength training.

Piper Trust’s partners in fall prevention promote home safety to make environments accessible to maintain health and physical capacity. Good Shepherd Villa began a highly successful wellness program six years ago. More recently, the city of Phoenix has promoted fall prevention through education, and Rebuilding Together provides a home modification program. Valley Christian Centers, after receiving training through the city program, has launched its own fall prevention program in South Phoenix.

## Stories from the Field

**LINDA ANDERSON, ADMINISTRATIVE ASSISTANT  
HUMAN SERVICES DEPARTMENT,  
CITY OF PHOENIX**

“Our goal is to keep the city’s older adults as independent as possible. One fall can make all the difference. There are so many dynamic people working with fall prevention, and it’s amazing the passion they have for this work and the population they serve. It’s been great making contacts in communities with so many different agencies. Each time we meet with a new group of people, networking opportunities

grow. A buzz is going: ‘You might contact this person doing giveaways’ or ‘Bring in this agency who will be interested in what you are doing.’

“A lot of partners in the community want to get the fall-prevention education to develop their own programs. We educate professionals and caregivers about home modification, the need for physical activity—even if it’s just stretching, medication reviews and screenings for vision and dental problems like poor-fitting dentures and abscesses that can affect eating and nutrition.”

For a free copy of “Falls are preventable” contact Dennis Flynn at Rebuilding Together, 480.774.0237, [dennis@rebuildingtogetherphx.org](mailto:dennis@rebuildingtogetherphx.org).

**JASON WRIGHT, HOUSING AND  
MARKETING DIRECTOR  
GOOD SHEPHERD VILLA, MESA**

“It’s been amazing to see how much the wellness program participants have accomplished. Many have stuck with it over the six years of the program. These people are doing better on average—they have a higher quality of life—than those who’ve just moved in. They do better with balance and mobility than those who haven’t participated; they are definitely sturdier individuals. What we see at Good Shepherd Villa is that those who do not get engaged or do not work to improve physically are major fall candidates. They fall, end up in a nursing home, then have another fall and the cycle continues.

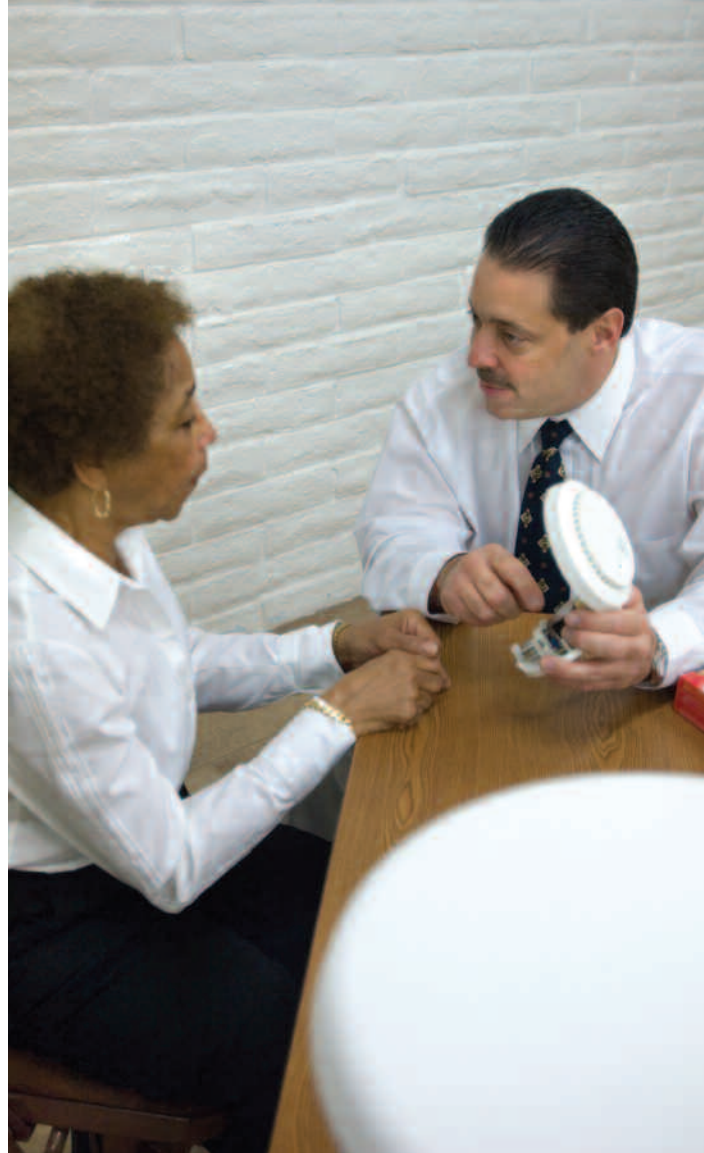
“Virgil, who is about to celebrate his 95th birthday, wasn’t walking well five years ago when he came and he spent most of his time in a motorized chair. He started to exercise, reluctantly, and then kept going and going. Now, he’s more mobile, walks all the time, and is better off than when he first came here. The hardest part is to begin. Older people are more apt to disengage, and then think that they can’t get any better. One hundred percent of the time if they stick with it long enough, they start to believe in themselves again. And that’s the greatest thing to see: hope on faces that were hopeless.”



**JOEY DELEO, ASSISTANT PASTOR  
VALLEY CHRISTIAN CENTERS, SOUTH PHOENIX**

“I often speak at senior centers about fall prevention—about the little things and the bigger things that need to be taken care of to make a home safe. One woman came to one of these presentations and invited us to her home. When we got there, it was so cluttered with old newspapers that we couldn’t walk through the home, let alone complete a safety inspection. We worked together with her church, gathered volunteers, brought a dumpster and emptied her home of clutter.

“Of course we found that her home needed many things: grab bars in the bathroom and shower, a shower stool and raised toilet seat, plus many electrical cords that needed to be rerouted throughout the home. She was happy to have these safety features added and absolutely ecstatic that we return to her home on a weekly basis just to check up on her, make sure her medicines are in the pill box, wash the few dishes in the sink and bring her lunch. She knows someone cares about her. She has new friends.” \*



## Activity & Disability by the Numbers

Here are activity and disability figures about the over age 65 population compiled by the U.S. Census Bureau and the Centers for Disease Control, as well as some numbers for Maricopa County from Center for Home Health Care Policy and Research Visiting Nurse Survey, 2002:

**65**  
Number of deaths per 100,000 due to falls in Arizona in 2007. The state death rate from falls is the sixth worst after Vermont, New Mexico, Wisconsin, South Dakota and Minnesota.

**56%**  
Percentage of adults over 65 participating in regular physical exercise more than three times a week.

**37%**  
Percentage of Maricopa County residents over 65 living with a disability. This 2006 figure compares to 21 percent living with a disability in 2000.

**3%**  
Percentage of Maricopa County residents age 65 and older requiring help with activities of daily living (ADL), which includes dressing, eating and taking a bath or shower, in 2002.

## FALL PREVENTION PROGRAM CREATES SAFE HOME ENVIRONMENTS

The difference between ability and disability for older adults often hinges on having a home free of physical hazards and a few simple appliances to enhance safety. Helping seniors live in safe environments is something Valley Christian Centers in Phoenix takes very seriously, and the organization has had a fall prevention program since July 2007. Joey Deleo (above), Valley Christian assistant pastor, and Henrietta Gathers are part of the fall prevention team of employees and volunteers. They complete in-home assessments and installation of safety items like bath stools, extendable shower heads, shower and bathroom grab bars, shower mats, toilet seat extenders and smoke alarms. Seniors appreciate the care and attention from consultations and follow-up visits. The staff has worked with 20 clients to date, and they are pleased that there have been no recorded falls among the participants. For more information, contact [Joey.Deleo@vccenters.org](mailto:Joey.Deleo@vccenters.org).



## Arts and Culture

**Total grants awarded in this area:  
\$2,300,000**



City of Phoenix Parks  
and Recreation Department  
\$300,000/24 months  
[phoenix.gov/PARKS/index.html](http://phoenix.gov/PARKS/index.html)

To support a project to renovate the 1922 Memorial Hall building at Steele Indian School Park that will be used for theatrical, dance and musical performances.

Maricopa Partnership for  
Arts and Culture, Phoenix  
\$2,000,000/36 months  
[www.mpacarts.org](http://www.mpacarts.org)

To develop partnerships that advance arts and culture in the region's economic development.

## Children

**Total grants awarded in this area:  
\$1,258,000**

Best Buddies Arizona, Phoenix  
\$150,000/36 months

[www.bestbuddiesarizona.org](http://www.bestbuddiesarizona.org)  
To support extracurricular clubs in Valley high schools that offer social inclusion opportunities for special education students.



Child Abuse Prevention License Plate  
Program (Arizona Community  
Foundation, fiscal agent, Phoenix)  
\$150,000/36 months  
[www.azfoundation.org](http://www.azfoundation.org)

To provide continued support for the Child Abuse Prevention License Plate Program.

Improving Chandler (AZ) Area  
Neighborhoods (ICAN)  
\$20,000/12 months  
[www.icanaz.org](http://www.icanaz.org)

To support the goal of achieving national accreditation for the agency, which provides out-of-school and family strengthening programming.

Liberty Wildlife Rehabilitation  
Foundation, Inc., Scottsdale, AZ  
\$400,000/24 months  
[www.libertywildlife.org](http://www.libertywildlife.org)

To support a capital campaign to build a permanent campus at Papago Park.

Maricopa Council on Youth Sports and  
Physical Activity (Arizona Community  
Foundation, fiscal agent)  
\$38,000/12 months  
[www.azfoundation.org](http://www.azfoundation.org)

To support the rollout of a web-based directory connecting children to community resources, which promote healthy, active lifestyles.

Piper Back-to-School Grants  
\$500,000/12 months  
[www.pipertrust.org](http://www.pipertrust.org)

To help 240 Maricopa County schools purchase school clothing and uniforms for low-income children.

## Education

**Total grants awarded in this area:  
\$351,500**

All-Star Kids Tutoring, Scottsdale, AZ  
\$51,500/12 months  
[www.askt.org](http://www.askt.org)

To recruit more volunteer reading tutors to work with struggling elementary school students.

The College Depot, Phoenix (Arizona  
Community Foundation, fiscal agent)  
\$300,000/48 months  
[www.azfoundation.org](http://www.azfoundation.org)

To support a collaborative effort to create a college access center to serve Valley students.

**Healthcare and Medical Research**  
**Total grants awarded in this area:**  
**\$1,807,400**

Banner Health Foundation, Phoenix  
\$1,500,000/36 months  
[www.bannerhealth.com](http://www.bannerhealth.com)

To support a capital campaign to expand the Children's Hospital at Banner Desert Medical Center in Mesa.

California Institutes of Preventive Medicine, La Jolla, CA  
\$9,400/12 months  
[www.caipm.org](http://www.caipm.org)

To determine the feasibility of developing a web-based patient history survey tool that will benefit Maricopa County residents.



Hospice of the Valley, Phoenix  
\$48,000/12 months  
[www.hov.org](http://www.hov.org)

To develop a curriculum and interactive program on palliative and end-of-life care for social workers and chaplains.

Creative Nonfiction Foundation, Pittsburgh  
\$250,000/12 months  
[www.creativenonfiction.org](http://www.creativenonfiction.org)

To develop a special issue of the journal *Creative Nonfiction* and a subsequent book on personalized medicine (to be published in 2010) to inform the general public about the coming revolution in medicine.

**Older Adults**  
**Total grants awarded in this area:**  
**\$427,500**

Civic Ventures, San Francisco  
\$250,000/12 months  
[www.civicventures.org](http://www.civicventures.org)

To support a countywide process to convene stakeholders and identify steps to promote civic engagement among older adults.

Community Services of Arizona, Inc., Chandler, AZ  
\$85,000/12 months  
[www.csaz.org](http://www.csaz.org)

To support the implementation of a Mather LifeWays-model café in the Gilbert Community Center.

Friends of the Tempe (AZ) Public Library  
\$92,500/12 months  
[www.friendsofthetempelibrary.org](http://www.friendsofthetempelibrary.org)

To support the next implementation phase of Tempe's older-adults programs for marketing, program support and engagement of four older adults in stipend positions.

**Religious Organizations**  
**Total grants awarded in this area:**  
**\$8,000,000**



The Roman Catholic Church of Phoenix  
\$8,000,000/36 months  
[www.diocesephoenix.org](http://www.diocesephoenix.org)

To support critical health and safety capital improvements for 25 Catholic elementary schools in Maricopa County.

**Other**  
**Total grants awarded in this area:**  
**\$136,150**

Arizona Planned Giving Institute, Phoenix  
\$87,400/24 months

To support the education and mentoring of nonprofit agencies to build an endowment.

Arizona State University Foundation, Tempe, AZ  
\$48,750/18 months  
[www.asufoundation.org](http://www.asufoundation.org)

To mentor nonprofits in fundraising using the ASU Lodestar Center for Philanthropy & Nonprofit Innovation, together with the consulting services of Kay Sprinkel Grace.

In fall 2007, Piper Trust and Flinn Foundation announced a \$45-million initiative to develop personalized diagnostics as part of the longer term goal of making Arizona a center for personalized medicine. The initiative is the vision of world-renowned scientist Lee Hartwell, Ph.D., 2001 Nobel laureate and director of Fred Hutchinson Cancer Research Center, Seattle, who will lead the effort.

The initiative builds on the strengths of the Biodesign Institute at Arizona State University and the Translational Genomics Research Institute (TGen). Following are



**2001 Nobel laureate Lee Hartwell provides the vision for the Partnership for Personalized Medicine.**

frequently asked questions about The Partnership for Personalized Medicine and the cornerstone component, the Virginia G. Piper Center for Personalized Diagnostics.

## Frequently Asked Questions on Personalized Medicine

### **Why does the Partnership for Personalized Medicine have the potential to change the practice of medicine?**

The Partnership aims to develop, test and validate personalized diagnostic tools for a wide range of diseases and then obtain approval for clinical use of these tests, which would be reimbursed by insurance companies. The result of this effort will be an entirely new approach to medicine that offers more accurate assessments of disease risk; better predictions of responses to treatment; and safer, more effective treatments. This will mean better health for all patients and long-term savings in the cost of healthcare, the fastest growing sector of many countries' Gross Domestic Product.

### **What is different about this approach compared to many other cutting-edge efforts in personalized medicine?**

Many of the recent breakthroughs in medical treatment focus on developing and applying personalized *therapies* and emphasize *treatment*. The Partnership seeks to develop personalized diagnostics that place a greater emphasis on *prevention*. The current emphasis on treatment entails the use of costly drugs that have contributed to escalating healthcare costs. This emphasis has been encouraged by insurers' reimbursement policies that provide much greater coverage for treatment rather than prevention. The Partnership's emphasis on prevention, while requiring changes in reimbursement policies, holds greater promise to reduce the overall cost of healthcare.



**Why does the Partnership for Personalized Medicine focus on the study of proteins, or “proteomics,” rather than the study of genes, or “genomics”?**

Apart from an emphasis on diagnostics instead of therapies, the Partnership also aims to focus on proteins rather than DNA or RNA as biomarkers of disease. Proteins are likely to be more informative than genomes as the basis for diagnostic tests and are applicable to a broader spectrum of diseases.

**How are protein biomarkers detected and validated for disease diagnosis and management?**

Biomarkers are identified by comparing proteins found in disease-associated and healthy samples of blood or tissue. The presence or absence of a particular protein (or combination of proteins) may correlate to a particular disease state or response to treatment. To date, protein biomarker discovery has been limited. Estimates suggest that there are possibly 100,000 different proteins in the blood, but only a very few of these have been validated for disease diagnosis and management. Recent advances in a technology—called mass spectrometry—now make it possible to identify and analyze proteins at previously undetectable levels.

Other breakthroughs in protein diagnostics will come from the field of medical imaging using tools such as X-rays, magnetic resonance imaging (MRI), ultrasound and positron emission tomography (PET). Combining protein biomarkers with imaging technology will enable the precise identification of disease activity within the body. However, such imaging tests are expensive. Therefore, using less costly blood-based protein diagnostics will be much less expensive than imaging and can also be used to identify which patients require more costly imaging tests also will contribute to the reduction in healthcare costs.

**What are the key elements of the Partnership for Personalized Medicine?**

The Partnership will employ a different scientific method to understand disease and will represent a radical new model in terms of its organizational structure. It will use a systems approach and bring together stakeholders from across the healthcare chain and beyond, including discovery laboratories, insurance carriers, healthcare providers, healthcare economists and regulatory agencies. Together, these stakeholders will design a better and more economical approach to healthcare.

The Partnership will create the Virginia G. Piper Center for Personalized Diagnostics (PCPD) which will conduct a series of demonstration projects. Each project will develop a specific diagnostic test for a specific condition and will be underwritten by an insurance payer or other funder. For example, countries with single-payer healthcare systems may be eager to support demonstration projects that address a disease that is a major cause of mortality in that nation. Large healthcare systems in the United States will be promising partners, as will disease-based and healthcare-focused philanthropic organizations. Each project will show a clear return on investment, measured in terms of both healthcare cost savings and increased productivity due to improved health.

**What, exactly, is the Virginia G. Piper Center for Personalized Diagnostics?**

The PCPD is the scientific discovery and development engine for the Partnership. The Piper Center will integrate resources within Arizona and beyond. It will oversee many diverse activities, including the recruitment and coordination of participants and funders for the demonstration projects; the design of these projects; the execution and management of each project, including biomarker discovery, diagnostics creation, and data management and analysis; and the development and commercialization of resulting intellectual property, among many others.

Because the development of the diagnostics hinges on identifying and validating protein biomarkers, the Piper Center will feature world-class proteomics production laboratory facilities. This production facility will operate within the Translational Genomics Research Institute (TGen) but will draw upon a wide range of resources within the state, particularly at the Biodesign Institute at ASU. The PCPD will build its high performance computing and informatics capabilities around the current, cutting-edge resources shared by ASU and TGen. The Piper Center also will incorporate healthcare economics capabilities, both by supporting faculty recruitment at ASU and by contracting with subject matter experts as needed. Finally, yet importantly, it will have capabilities in the areas of nanotechnology and imaging, which will be critical to the development and commercialization of diagnostics tools.



DEVELOPMENT OF THE DIAGNOSTICS HINGES ON IDENTIFYING AND VALIDATING PROTEIN BIOMARKERS, THE PIPER CENTER WILL FEATURE WORLD-CLASS PROTEOMICS PRODUCTION LABORATORY FACILITIES.

### **What is the Flinn Fund for Arizona Proteomics Research?**

This component of the Partnership for Personalized Medicine, established by the Flinn Foundation, will emphasize and enable research collaborations among other Arizona-based institutions, including the state's research universities, healthcare providers, research institutes, and industry partners. Examples include emerging statewide research consortia such as the Arizona Proteomics Alliance, the Advanced Research Institute for Biomedical Imaging at the University of Arizona and the Arizona Biospecimen Alliance.

### **Does the Piper Center for Personalized Diagnostics change the Piper Trust's personalized medicine initiative?**

The goals of the personalized medicine initiative that the Trust established in 2006 are several:

1. To make Phoenix an intellectual hotbed of distinctive work in the field of personalized medicine so that Arizona will attract world class talent and international recognition.
2. To develop new medical strategies that will advance the translation of cutting edge research into tangible changes in patient care based on individualized diagnosis, treatment and prevention.
3. To leverage the Trust's dollars so that more investments will be made in the Phoenix area in advancing the field of personalized medicine.
4. To forge strategic partnerships among institutions in the Phoenix area that will produce greater impact and less duplication.

The Trust's original design of 10 chairs sought to achieve these goals. What Piper Trust could not anticipate in January 2006 was the opportunity to link the Trust's initiative with Dr. Lee Hartwell's revolutionary vision

of advancing the field through focused work in personalized diagnostics. The Virginia G. Piper Center for Personalized Diagnostics will enable the Trust to realize all of the above goals and at a level even greater than that originally anticipated with the filling of the 10 chairs. Furthermore, funds remain to advance the personalized medicine initiative. \*



# PIPER TRUST AWARDS SABBATICALS FOR PROFESSIONAL DEVELOPMENT AND RENEWAL TO FIVE NONPROFIT LEADERS

Piper Trust named five exemplary nonprofit leaders as Piper Fellows in December 2007. The 2007-2008 class of Piper Fellows are Blase Bova, Society of St. Vincent de Paul; Lisa Glow, Southwest Autism Research & Resource Center; Theresa Leon, Friendly House; Connie Phillips, Sojourner Center; and Kurt Sheppard, Valle del Sol, Inc.

The Piper Fellowships, each providing up to \$30,000, are intended to give professionals in the nonprofit field a minimum of one month to a maximum of two months work-release time plus expenses for study and travel. The sabbatical experiences have ranged from seminars at leading universities to visits to nationwide best-practice sites to leadership development programs and personal coaching. Since 2001, the Piper Fellows program has funded 28 nonprofit executive sabbaticals.

“The pressures of high-impact jobs in the nonprofit world are not unlike the stresses and demands of other key leadership roles in the public and private sectors,” said Judy Jolley Mohraz, president and CEO of the Piper Trust. “Piper Fellowships allow us to acknowledge the never-ceasing demands of nonprofit leadership and provide opportunities to learn from thought leaders across the nation.”

In addition to providing a maximum of five fellowships annually, Piper Trust awards up to \$10,000 to match new or increased professional development for each awardee organization’s staff. “Staff development funding has enabled staff, who have held down the fort while the executive is absent, to build skills, acquire knowledge and gain insights as a team,” said Mohraz.

## 2007 - 2008 PIPER FELLOWS



**Blase Bova**  
**Director of**  
**Development**  
**Society of St.**  
**Vincent de Paul**

He intends to build traditional fundraising skills by completing Indiana University’s fundraising certification program. To acquire more personal and cutting-edge skills, he will participate in the University of Iowa’s Summer Writing Festival, Stanford’s Digital Media Academy and an Inward Journey/Outward Bound program.



**Lisa Glow**  
**President and**  
**CEO**  
**Southwest**  
**Autism Research**  
**& Resource**  
**Center**

She will study Strategic Perspectives in Nonprofit Management at Harvard Business School and The Shambala Institute for Authentic Leadership in Halifax, Nova Scotia. She also will attend the Boston Autism

Consortium and make site visits to innovative entrepreneurial programs such as Dancing Deer Bakery in Boston.



**Theresa Leon**  
**Chief Operating**  
**Officer**  
**Friendly House**

She will attend the Leadership

Development Program at the Center for Creative Leadership and complete final coursework for the Nonprofit Leadership and Management Certificate Program at Arizona State University. In addition, she will work with a personal coach over the fellowship year to advance her work for the organization.



**Connie Phillips**  
**Executive**  
**Director**  
**Sojourner Center**

She wants time to focus on internal

organizational needs, professional leadership development and

renewal. She will take the “Performance Measurement for Effective Management of Nonprofit Organizations” course in the Social Enterprise Program at Harvard Business School. She also will do self-study with the Lance Secretan training program based on the servant-leader model.



**Kurt Sheppard**  
**Chief Programs**  
**Officer**  
**Valle del Sol, Inc.**

He plans to attend Harvard Business

School’s Strategic Perspectives in Nonprofit Management Seminar and the Stanford Graduate School of Business Executive Program for Nonprofit Leaders. He also will participate in the National Center on Nonprofit Enterprise Conference. \*





Wayne Parker, Ph.D.

# HUD endorses Arizona Evaluation Project on Homelessness as national model

What started as a three-month consultation with the Regional Committee on Homelessness turned into a four-year collaboration resulting in a measurement system that has recently been recognized as a best practice by the U.S. Department of Housing and Urban Development.

The Arizona Evaluation Project on Homelessness started in 2002 with the need to improve the measurement of how much each homeless program client is affected by the services they receive, noted Wayne Parker, Ph.D., Piper Trust's director of research and evaluation.

The federal government requires agencies to measure the services provided to individual homeless clients in order to receive reimbursement, exceeding \$21 million in 2008. The problem was that there weren't common criteria and evaluation systems among agencies and no effective way to create a common database of information. The project goal was to develop a way to help agencies measure their effectiveness and the overall effectiveness of the statewide system.

According to Dr. Parker, the project included several steps: 1) assessing existing evaluation practices among the various agencies; 2) creating a standardized evaluation method; 3) establishing a reporting and analysis system, and 4) developing a feedback process with the agencies. The new measurement system was designed and fully adopted throughout Arizona in 2006.

In the following year, the work was presented as part of the "2007 National Symposium on Homelessness Research," sponsored by the Departments of Health and Human Services and Housing and Urban Development, which jointly convene a symposium of researchers, policy

experts, practitioners and consumers in Washington, D.C., every 10 years to hear papers by invited authors on topics such as homeless families and children, housing models and chronic homelessness.

The Arizona Evaluation Project on Homelessness was presented as a case study, "Accountability, Cost-Effectiveness and Program Performance: Progress Since 1998," co-authored by Dr. Parker.

"No agency excels with all clients," the paper reported, "and the predictive model allows each agency to objectively explore whether there are systematic differences between the types of clients with whom they experience the most success and those who are most challenging."

One agency serving disabled and older homeless men and women, for example, determined that it was far more effective with the older population than with people with disabilities. This agency is now exploring what practices and techniques can increase its effectiveness with such clients.

Another agency identified that, despite stronger outcomes than expected overall, it was less successful with Hispanic clients. As a result, the agency is consulting with agencies working more successfully with Hispanics to help identify what changes might increase its effectiveness with this population.

This ongoing measurement and feedback system allows agencies to continually rethink their target populations and adjust their service delivery as indicated. In recent months, HUD has endorsed the Arizona evaluation model recommending its use nationwide in measuring outcomes of agencies serving the homeless. \*

## THE VIRGINIA G. PIPER CHARITABLE TRUST

The Virginia G. Piper Charitable Trust is a private, independent foundation committed to honoring Virginia Galvin Piper's legacy of supporting organizations whose work enhances the lives of people in Maricopa County. Following the philanthropic example of her first husband, Paul V. Galvin, the founder of Motorola, Mrs. Piper wrote, "For me, managing the stewardship of charitable giving is a moment to moment dignified responsibility of a truly high calling in human affairs and human relations."

Moving from Chicago with her second husband, Kenneth M. Piper, Mrs. Piper lived in Paradise Valley, Ariz., for the last three decades of her life and quietly but steadily worked to strengthen Phoenix area nonprofits. Following her death in 1999, the Trust received approximately \$600 million, becoming one of the 100



Virginia Galvin Piper

largest foundations in the United States. In its grantmaking, the Trust has continued Mrs. Piper's interest in supporting healthcare and medical research, children, older adults, arts and culture, education and religious organizations.

Today, trustees and staff strive to preserve Mrs. Piper's spirit of "high calling" and stewardship in all their work in the Greater Phoenix community. Piper Trust has invested more than \$229 million in nonprofits and programs. Trust grants have benefited nearly 800 nonprofit organizations. With its focus on one geographic region, Piper Trust works to be more than a grantmaker by convening groups to address community issues, bringing national thought leaders to meet with nonprofit executives and fostering collaboration in the philanthropic sector. \*



From left: Paul Critchfield, José Cárdenas, Sharon Harper (seated), Laura Grafman, James Bruner, Arthur DeCabooter, Stephen Zabilski

### TRUSTEES

James D. Bruner  
 José A. Cárdenas  
 Paul N. Critchfield  
 Arthur W. DeCabooter  
 Laura R. Grafman  
 Sharon C. Harper  
 Stephen J. Zabilski

### STAFF

Judy Jolley Mohraz, President and CEO  
 Mary Jane Rynd, Executive Vice President and CFO  
 Karin Bishop, Grants Manager  
 Laurie Callan, Assistant Controller  
 Marilee Dal Pra, Program Director  
 Debbie Dickey, Administrative Coordinator  
 Jane Ferguson, Director, Communications and External Relations  
 Lynn Hoffman, Controller  
 Catherine Jahnes, Research and Evaluation Associate  
 Carol Kratz, Program Director  
 Leslee Oyen, Assistant to the President  
 Wayne D. Parker, Director of Research and Evaluation  
 Gary Romero, Grants Management Associate  
 Liselotte Sandell, Receptionist/  
 Administrative Assistant  
 Todd Scheuring, Communications Associate  
 Ellen Solowey, Program Associate  
 Julie Weglarz, Office Assistant



— THE —  
VIRGINIA G.  
PIPER  
CHARITABLE TRUST

6720 North Scottsdale Road  
Suite 350  
Scottsdale, Arizona 85253  
[www.pipertrust.org](http://www.pipertrust.org)

Return Service Requested

NONPROFIT  
ORGANIZATION  
US POSTAGE  
PAID  
SCOTTSDALE AZ  
PERMIT NO 243