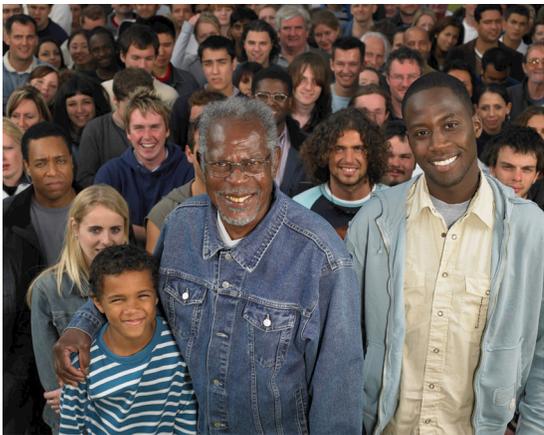


TURNING INTEREST INTO KNOWLEDGE INTO COMMITMENT

Expanding philanthropic investment in aging is a perennial challenge. Less than two percent of all private philanthropic dollars are focused on older adults in the United States, even though our older population will double by the year 2030. Ten years ago, in an effort to reverse this trend, Grantmakers in Aging (GIA) embarked on the EngAGEment Initiative, an effort to partner with and inspire regional associations of grantmakers and related groups to take an interest in funding aging.



Historically, like many philanthropic affinity groups, GIA had a distant and slightly competitive relationship with regional associations. Could GIA change that dynamic? Could it forge viable partnerships by providing content on aging while regional associations used their local connections to disseminate information? In other words, could these “friendly competitors” turn into partners?

In 2004, The Atlantic Philanthropies initially granted GIA funds to test a “proof of concept” for the EngAGEment Initiative over three years. During that time, GIA provided small grants to regional associations, which their member foundations matched dollar for dollar. Each regional association then set out to engage

their membership in learning more about aging and to consider funding in the field. Atlantic then supported the program’s expansion further in 2007 and 2011, and subsequently approved a no-cost extension through December 2012.

Using an affinity group such as GIA to stimulate interest in a specific funding area was an untested idea, but the strategy worked. The effort raised GIA’s national profile, strengthened its reputation, and broadened its skill base. It offered opportunities for new kinds of partnerships and developed a model for future collaboration with different types of funders. It expanded GIA’s capacity to work both with members and nonmembers.

Most notably, EngAGEment generated 29 new partnerships involving local funders and raised \$757,503 in matching funds. All told, the initiative was able to document \$6.5 million in new financial infusions into aging, spearheaded by EngAGEment grantees such as the Baltimore Association of Grantmakers, the Washington Regional Association of Grantmakers, and Nonprofit Connect (Kansas City). That adds up to a nearly 4:1 return on Atlantic Philanthropies’ \$1.78 million support for the effort.

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THREE MEASURED STEPS

The EngAGEMENT model used challenge grants to regional associations to raise matching funds and assemble local philanthropic leaders into groups called Design Teams, and then tasked these teams to answer the question: “What will it take to expand funding for aging in our region?” Each team completed a needs assessment of its region’s aging population and developed initiatives to address those needs in order to help older adults become assets in their communities. GIA’s EngAGEMENT staff provided technical assistance to promote innovation and sharing among participants.

EngAGEMENT took place in three phases, each an expansion, in either funding or reach, of the one before. GIA’s approach to supporting grantees also evolved over the grant period. For example, it used site visits in Phase 1, but in Phases 2 and 3, oversight evolved into check-in phone calls and a half-day workshop at GIA’s annual conference.

In the pilot Phase 1 (2004 to 2007), six regional associations received \$10,000 per year over two years, based on securing dollar-for-dollar matching funds from their members. Regional associations submitting successful proposals could also receive a \$5,000 Opportunity Grant to support an extra year of EngAGEMENT activities. Four of the six original grantees applied for an Opportunity Grant, and all received one.

Incorporating feedback from Phase 1, project adjustments were made for Phase 2 (2007 to 2012). The EngAGEMENT grant amount increased from \$10,000 to \$15,000 for each of two years, with equal matching requirements. Regional associations could also take advantage of Opportunity Grants for a third year of funding, which increased to \$10,000, with no matching requirement.

Forty-one local philanthropic leaders participated on Design Teams for EngAGEMENT during Phase 2. Five regional associations applied for and received EngAGEMENT funds during the first year, and five more came on board during the next two years.

Unlike Phase 1, wherein all grantees moved through the two-year grant period on the

same schedule, Phase 2 had staggered starts, so grantees lacked a clearly defined cohort. The final evaluation revealed that this contributed to a feeling of isolation and a lack of confidence about how to proceed with their projects. As a result, GIA experimented with mentorship grants, pairing newer grantees with experienced ones to help with orientation, and with making connections between and among these groups.

Phase 3 (2010 to 2012) expanded the scope of participating organizations beyond regional associations to include two national issue groups, Grassroots Grantmakers and Grantmakers for Children, Youth & Families. In addition, two national philanthropic infrastructure organizations became EngAGEMENT partners — the Forum of Regional Associations of Grantmakers (The Forum) and the National Center on Family Philanthropy (NCFP). These grants ranged from \$10,000 to \$20,000 over one or two years.

This third phase of EngAGEMENT provided a watershed moment for the initiative. Reaching out to these new groups provided a new lens through which to explore the possibilities of the EngAGEMENT model and access to new groups of funders. In addition to working regionally, EngAGEMENT was now working on a national stage, breaking new ground.

GRANTEE ACTIVITIES

Most regional associations conducted surveys, either to ascertain baseline and post-intervention attitudes toward funding in aging or to measure satisfaction with program offerings. With few exceptions, however, surveys had low response rates, making it difficult to put the findings into a helpful perspective and learn *why* funders were not currently making grants in aging.

Nearly every regional association, issue group, and national infrastructure partner sponsored educational programs, which focused on topics as diverse as *Seniors in Financial Crisis*; *The New Demographics: How Will Our Aging Society Affect Your Grantmaking*; and *Lifelong Learning: Targeting your education dollars to create, sustain and serve learners of all ages*.

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Five regional associations conducted webinars, and 11 posted Web resources, including YouTube videos. Eight pursued policy and advocacy initiatives, and many undertook media outreach strategies. Of the final work submitted to GIA, there were 28 articles, most published in newsletters and newspapers, as well as 70 multi-media products, such as short videos. There were also 26 publications, including brochures, issue papers, and white papers; and 15 resource guides, such as fact sheets, compendia, and databases.

Below are a just a few of the creative and unique accomplishments of the regional associations:

- **Arizona Grantmakers Forum (AGF):** AGF hosted three educational offerings that featured national leaders as keynote speakers: Marc Freeman from Civic Ventures on civic engagement; Ramsey Alwin from NCOA on low-income seniors; and Phil Stafford from Indiana University on creating communities for all ages. At its midpoint, AFG added a formative research project involving one-on-one interviews with 30 Arizona funders to explore attitudes toward projects in aging and how best to engage foundations. Through the interview process, the funders had an opportunity to learn more about how their current funding might actually relate to older adults and how they could become involved in the wide range of funding opportunities with an older-adult focus or theme. In addition to collecting information during these interviews, the interviewer would provide information about the changing demographics and why funding in aging was so important. Post-EngAGEMENT, the project staff and funders continue to participate the Leadership Team for the Community AGenda Initiative, a new GIA project to promote age-friendly communities in five regions in the U.S. (Maricopa County is one of the five) funded by the Pfizer Foundation. The project is also disseminating results of the funder interviews with a broad group of stakeholders in the region.
- **Southeast Council of Foundations (SECF):** SECF covers the largest geographic territory (11 states) of any regional

Key Accomplishments

At the end of the EngAGEMENT project, its impact greatly exceeded original expectations:

- A total of 114 foundations participated in EngAGEMENT, either by donating required matching funds and/or by participating on Design and Leadership teams.
- Some 97 new educational and information programs attracted more than 3,300 people.
- At least 29 partnerships were established as the result of EngAGEMENT, many of which will continue EngAGEMENT work past the grant period. In fact, almost every regional association or issue group reported some portion of the EngAGEMENT work will continue past the grant period.
- Originally, many regional associations had envisioned projects run by their members within their narrow scope of interest, but the partnerships and lasting contributions of EngAGEMENT turned out to be almost uniformly interdisciplinary and covered a gamut of major regional initiatives.
- In total, EngAGEMENT resulted in a nearly 4:1 return on The Atlantic Philanthropies' original investment of nearly \$1.78 million.

association, and because its members are geographically far apart, it made extensive use of technology (e.g., webinars, YouTube videos) to connect with and educate its members about aging. Design Team members raised sufficient funding to continue EngAGEMENT past the end of the grant period. All told, SECF sponsored 12 presentations and has also been supportive of the work of the Atlanta Regional Commission, also one of the five grantees funded by GIA's Community AGenda Initiative, as well as the efforts of the Florida Philanthropic Network.

- **Nonprofit Connect, Kansas City (NPC):** Nonprofit Connect had some outstanding successes with EngAGEMENT: the Jewish Heritage Foundation pledged to earmark \$1.4 million in aging over five years as a result of its experience working with EngAGEMENT. At the end of the EngAGEMENT project, NPC transitioned to

become part of MARC, the Mid-America Regional Council, which, as a result of EngAGEMENT work, has taken on aging as an area of focus for the region. The project also produced 22 events, including 15 presentations to business and community groups, with national speakers such as Mia Oberlink, Senior Research Associate, Center for Home Care Policy and Research, Visiting Nurse Service of New York; Phil Stafford, Director, Center on Aging and Community, Indiana University; and Brian Hofland, President, Research to Prevent Blindness (NY). During the course of the work, Nonprofit Connect's EngAGEMENT project changed focus from educating foundation staff to targeting thought leaders in the community. The Design Team expanded from three to 13 members, representing a wide range of organizations. Importantly, the project produced two videos, one of which was edited to make the content more generic and was distributed to other EngAGEMENT sites.

KEY COMPONENTS

A final evaluation revealed that two key components were critical to EngAGEMENT's accomplishments: (1) the establishment of a mechanism for sharing materials; and (2) the realization of how long it can take to generate a funders' interest and convert that interest into action.

In the early years of the initiative, the lack of a repository for EngAGEMENT materials emerged as a significant drawback. Eventually, GIA set up an FTP site for this purpose, but it was awkward to use and generated little traffic. Then, in 2010, GIA transitioned from the FTP site to the more efficient online workspace on Basecamp hosted by The Forum for Regional Associations of Grantmakers, where regional associations and other grantees could easily post and access a wide range of resources across sites.

As to startup time, grantees almost universally required a six-month ramp-up period. Each EngAGEMENT grantee needed to find approaches that would work for its specific region, and it took months to put forth ideas

and for new relationships to develop into partnerships. Grantees who joined the project in the last two years were not eligible for Opportunity Grants to fund a third year and reported that they felt that the third year of funding would have helped them leverage more funds. That third year turned out to be critical in bringing projects to maturity.

CHALLENGES

Despite the successes, there were many challenges along the way. Grantees faced some unexpected hurdles. For example, both Philanthropy New York and the Southeastern Council experienced significant turnover of staff and consultants responsible for implementing the project. Other challenges were more universal:

- **Economic Downturn.** In 2008/9, the economic recession hit philanthropy hard, and foundations limited staff attendance at conferences and activities initially offered by the regional
- **Difficulty Reaching Targeted Audiences.** Grantees found it difficult to entice new people to attend educational offerings, and as a result, many were poorly attended.
- **"Aging" Not Appealing.** Many grantees came to the conclusion that aging issues needed rebranding in order to spark interest.
- **Difficulty Connecting Funding to Aging.** Many funders did not consider themselves "aging funders" and therefore did not join EngAGEMENT activities.
- **Viewing Aging Is a Collateral Issue.** Some funders considered aging an offshoot of health care and were not interested in EngAGEMENT work.
- **Lack of Local Data.** Although national databases had information on aging, sites quickly realized that the information needed to be tailored to specific geographical locations in order to be useful.

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- **Changing Attitudes Takes Time.** It takes time to convene foundations around an issue, for partnerships to mature and for those partnerships to produce results.
- **Limitations of Educational Programming.** Although many grantees provided educational programming, its limitations quickly became obvious. As one regional association noted, “... we observed how ineffective educational sessions were in engaging a broad coalition of funders in our cause. The educational session approach, while highly rated by those who attended, was passive and not designed around a solid understanding of our target audience of funders.”

Although grantees went through significant periods of uncertainty about how to proceed, they reported that they were pleased with their accomplishments. Grantees also reported investing much more time and organizational resources in EngAGEment than was either required or anticipated.

Internally, GIA struggled with EngAGEment staffing, and especially with turnover among project managers. GIA’s Engagement managers had to have expertise in three areas: philanthropy, gerontology, and project management. Individuals with all of those skill sets were difficult to find. And although the matching grant component of EngAGEMENT was modest, the free-form structure of the work was surprisingly complex, requiring far greater-than-anticipated technical support from GIA staff and consultants.

MEASURING ENGAGEMENT’S IMPACT

EngAGEMENT was a bold funding initiative with far-reaching accomplishments. The Atlantic Philanthropies invested \$1,783,275 in the project, and grantees raised a total \$757,503 in matching funds. They also raised an additional \$222,503 in overmatched funds, and their participation in EngAGEMENT put them in a position to leverage significant funding for aging projects outside of the initiative from regional associations.

Another major source of funding inspired by, but not part of, EngAGEMENT was the 2012 Community AGENDA Initiative grant

Evaluation Methodology

The program evaluator employed both formative (ongoing) evaluation and summative (final) evaluation strategies. Formative evaluations compare ongoing processes with intended final outcomes to ensure a project is proceeding as envisioned. The evaluator used the Theory of Change Model developed for The Annie E. Casey Foundation to assess the extent to which the program met its objectives and achieved its outcomes. There are three major components to this evaluation framework:

- **Achieving impact** refers to measuring changes that can be documented on both the individual level and the population level. The extent of the EngAGEMENT Initiative’s impact rested on whether foundation staff and other community leaders acquired new knowledge about aging that will ultimately increase their levels of monetary giving.
- **Increasing influence** refers to the extent to which EngAGEMENT projects sparked change in institutions, partnerships, and visibility of aging issues.
- **Leveraging funding** refers to the program’s influence upon changes in public or private funders’ investment strategies as a result of a project’s efforts.

to GIA from the Pfizer Foundation. The Pfizer Foundation approached GIA because the Foundation’s staff had heard about EngAGEMENT’s success as a grantmaking strategy. Early meetings were spent reviewing the work and the outcomes of EngAGEMENT, leading to a \$1.3 million Pfizer Foundation grant that helped launch the Community AGENDA Initiative to advance age-friendly work in five regions, provide new online resource materials, and create new partnerships with other national and international organizations doing similar work. Like EngAGEMENT, Community AGENDA includes a focus on stimulating philanthropic involvement and support as part of its broader, community building focus.

When taken together, the initiative was able to document \$6.5 million of new financial infusions into aging, spearheaded by EngAGEMENT grantees. That adds up to nearly 4:1 return on Atlantic Philanthropies’ \$1.78 million in support.

PARTNERS IN ENGAGEMENT

A total of 114 foundations participated in EngAGEMENT. GIA worked with new organizations and forged a broader, national role for itself. Grantees stepped out of their usual partnerships to learn about aging and about GIA and its range of expertise and connections. Finally, a diverse array of funders from philanthropic, civic and government venues joined the EngAGEMENT Initiative. Two of the 10 regional associations attained tangible increases in aging-related funding due to EngAGEMENT. Others moved from interest to knowledge to commitment.

GIA and its partners developed new skills in problem solving and building new partnerships, and the ongoing dialogue with funders, government, civic leaders, and community leaders contributed to EngAGEMENT's most impressive results. Making connections between existing funding strategies and aging were also key. For example, a foundation that supports an after-school program for children may think of this as children's funding. However, the after-school program may draw on senior volunteers in the neighborhood who the foundation's dollars train and support.

SUMMARY

In summary, the EngAGEMENT Initiative has demonstrated a lasting impact and highlighted opportunities for GIA to play a more visible role as "aging" goes through a redefinition in national and local philanthropic circles. Clearly, the EngAGEMENT model engaged funders' interest, made them more knowledgeable, and moved them into commitment. The model also helped transform competing philanthropic organizations into collaborative partners. In the years to come, we expect new lessons from EngAGEMENT to emerge, and new partnerships will produce additional, and much-needed, funding in the field of aging.



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