

# *Elders as Resources*

**INTERGENERATIONAL STRATEGIES SERIES**



## **Communities for All Ages in Arizona: Documentation Report Part 1**



The Annie E. Casey Foundation  
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## **ACKNOWLEDGEMENTS**

The Annie E. Casey Foundation is a private charitable organization dedicated to helping build better futures for disadvantaged children in the United States. It was established in 1948 by Jim Casey, one of the founders of UPS, and his siblings, who named the Foundation in honor of their mother. The primary mission of the Foundation is to foster public policies, human-service reforms, and community supports that more effectively meet the needs of today's vulnerable children and families. In pursuit of this goal, the Foundation makes grants that help states, cities, and neighborhoods fashion more innovative, cost-effective responses to these needs. For more information, visit the Foundation's website at [www.aecf.org](http://www.aecf.org).

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## **ABOUT THIS SERIES**

Elders as Resources explores successful practices, programs, and policies to mobilize the vast potential of older people to improve the lives of children, youth, families, and communities. This series of publications is intended to make the information available to Making Connections sites, to all units and grantees of the Foundation, and to interested members of the public. The Elders as Resources series was developed by Jessica Strauss, Consultant to the Annie E. Casey Foundation since 1997 and currently Co-Director of Baltimore Community School Connections, a non-profit technical assistance center, and Paula Dressel, formerly Director of Planning, Research, and Development at the Annie E. Casey Foundation, and now Vice President of JustPartners, Inc., a Baltimore-based consulting firm.

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Intergenerational Strategies Series  
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## EXECUTIVE SUMMARY

Communities for All Ages, an initiative launched by the Arizona Community Foundation (ACF) in 2003, seeks to bring together diverse groups of community leaders, youth, and older adults to develop action plans that address common concerns, such as lifelong learning, civic engagement, transportation, housing, and individual/family support.

This documentation project, generously supported by a grant from the Annie E. Casey Foundation, seeks to summarize the Communities for All Ages Initiative, highlight key findings and present lessons learned. This first report provides information on the initiative development, planning grant phase, and implementation sites selection. A second document will provide information on the first six months of program implementation.

The Communities for All Ages Initiative (CFAA) has a three-part design that includes Awareness Building, Planning Grants and Implementation Grants.

**Awareness Building:** ACF held community meetings across the state to raise awareness of the concepts behind a “community for all ages.”

**Planning Grants:** Nineteen Planning Grant Requests for Proposals were received from communities across the state, and nine were awarded planning grants of \$10,000. The proposals served a wide cross-section of Arizona’s population, including rural and urban, the economically depressed, and border communities.

Each site undertook a unique discovery and planning process. All sites formed central planning committees, addressed a variety of core elements, worked with various institutions and organizations. In addition, all sites produced an assessment of the needs, problems, and desires of residents to form the basis of their plan for a community for all ages. Sites used a variety of mechanisms to collect this information, including focus groups, surveys and one-one-one interviews.

Sites encountered a variety of challenges in undertaking this planning process. Some of the issues identified by planning grantees included a need for a youth/intergeneration center to provide a safe place for youth to spend time; a lack of awareness of services in their community; a lack of employment opportunities in their community; and a need to involve the Spanish-speaking population in community planning.

On the other hand, grantees achieved successes including a sense of being able to bring the community together in dialog about an issue, team collaboration and involvement, and an ability to focus on the assets of the community. In addition, some noted that they felt success in simply completing such a daunting task with little previous experience.

There was a noticeable difference between the sites that built on a previously existing coalition versus those that had to build the planning effort “from scratch.” The groups that built this planning project into an already existing effort had greater early success in getting organized and outlining expectations. Comparatively, the sites that began CFAA by developing a new coalition spent much time working on who would be at the table and how they would operate. These groups struggled to establish a clear vision and expectations from the beginning. These sites also expressed that the members of their team were very busy and had difficulty finding times to gather to move the project forward. While these groups had a somewhat more difficult time getting off the ground, they were more likely to include youth and older adults in the actual planning process and to put together a plan

that embraced all elements of a community for all ages. In addition, some of these new collaboratives used this planning model to undertake additional community projects.

Some sites moved quickly and naturally to take advantage of newly formed alliances and building momentum before applying for an implementation grant. For example, one rural site reported an announcement by the County Supervisor of funding for a year-long, monthly newsletter, as well as purchase of land for an Intergenerational Community Center.

**Technical Assistance:** Sites were provided with a variety of technical assistance, including on-site support in planning, facilitation, and capacity building, information on ways other communities have addressed intergenerational planning initiatives, information on foundation expectations and guidelines, etc. In addition, sites were gathered as a network for periodic “Learning Community” meetings. These meetings were opportunities to share experiences, learn from each other, and better understand the expectations of the CFAA initiative.

Generally sites found the technical assistance provided to be beneficial. Sites appreciated the ability to pursue a community-specific planning project, and yet have some direction and support from the TA team.

**Implementation and Continuation Grants:** Because of the success of the planning phase, ACF pulled together a larger pool of resources than originally planned. Four sites were awarded a three-year, \$50,000 per year grant and one site was awarded a \$20,000 challenge grant to implement a prototype and refine their planning efforts. The remaining four were encouraged to continue the progress that had made during the initial planning phase. Three of these sites were awarded a one-year, \$10,000 grant to continue and refine their planning efforts.

Of the five implementation sites, two were rural and three were urban. All sites have the stated goal of establishing more intergenerational services and programs. Four of the five sites included plans to establish a physical space for the community to gather and participate in intergenerational programming. At least two of the urban sites aim to improve the level of safety in their neighborhood, increase involvement of the neighbors in programming decisions, as well as enhance communication within the community. All sites have a focus on cultural expression as a vehicle to bring people across age, ethnic, neighborhood, and other boundaries together.

## LESSONS LEARNED

While the learning is still underway, several key lessons have emerged around issues of planning, CFAA structure, technical assistance, Initiative-wide and Regional meetings, creating new partnerships, and understanding local cultural context.

### Introduction and Background

Communities for All Ages, an initiative launched by the Arizona Community Foundation (ACF) in 2003, focuses on the challenges and opportunities facing both younger and older populations in Arizona. Communities for All Ages (CFAA) seeks to bring together teams of diverse groups of community leaders, youth, and older adults to develop action plans that address common concerns, such as lifelong learning, civic engagement, transportation, housing, and individual/family support. The initiative is based on a conceptual framework developed by the Temple University Center for Intergenerational Learning and supported by the Annie E. Casey Foundation.

A Community for All Ages is one that:

- Promotes the well-being of children, youth, older adults and families.
- Makes full use of the assets of people at every stage of life.
- Embodies and promotes the values of reciprocity, individual worth, diversity, inclusion, equity, and social connectedness.
- Is age integrated.

Arizona Community Foundation's Communities for All Ages Initiative has a three-part design:

- **Awareness Building**—holding community meetings across the state to raise awareness of the concepts behind a “community for all ages.”
- **Planning Grants**—awarding planning grants to several communities across the state to undertake a planning process aimed at building awareness of the needs of youth and older adults and intergenerational approaches to addressing those needs.
- **Implementation Grants**—awarding a number of grants to planning grant communities to implement the activities and projects that build the community environment identified during the planning period.

See Appendix A for Initiative timeline.

A combination of emerging trends and institutional developments encouraged the Arizona Community Foundation to undertake CFAA. While the demographic trends—fast-growing older adult and youth populations—and the changing needs of older adults and youth are fairly obvious reasons to undertake this initiative, there are additional factors that were relevant to the creation of CFAA. For example:

- **Senior Enclaves**—Arizona was one the original homes of senior-living enclaves, places where older adults went to be alone with other older adults. These are increasingly dissatisfying to some seniors as well as to some of the communities that house them.
- **Civic Engagement**—in both the aging and youth development fields there has been growing awareness of civic engagement as an opportunity for growth and development.
- **Siloed Funds Within ACF**—like many funders, ACF has one portfolio dedicated to youth and another portfolio dedicated to older adults. These “silos” mirror the silos of programs in communities. There was interest in exploring the possibility of breaking down the artificial barriers between youth and adults, bringing some of these funds together, and leveraging greater outcomes for communities.

**Purpose of this Report:** Part I of this Documentation Project seeks to summarize the history of the initiative, the first stage of planning grant proposals, site selection, the year of technical assistance, planning leading to the implementation grants, selection of implementation sites and plans for support during the implementation period.

No history is truly linear. Rather, events that shape an initiative, such as CFAA, are circular and iterative. Key informant's views of events differ and documents reveal different records of landmark events. As such, this documentation report is not a “timeline” or “factual” history. Part I of the Documentation Project attempts to capture the variety of forces that shaped this initiative, summarize key features of the implementation plans, and provide a variety of perspectives on lessons learned.

Part II of this Documentation Project will summarize the first six months of implementation at the funded sites as well as what has happened in the other sites that submitted plans but were not awarded implementation grants. This documentation project is supported by a generous grant from the Annie E. Casey Foundation.

**Methodology:** To document the launching of this initiative and capture the planning process, the Documentation Team used a variety of data sources, including:

- **Document Review**—including meeting minutes, staff file/notes, official CFAA documents, planning proposals, background reports, and community profiles.
- **Interviews**—including interviews with current and former ACF staff and lead national and local consultants.
- **Meetings**—including attending two of the three initiative-wide meetings, one initiative planning meeting, and individual meetings with ACF staff.
- **Surveys**—including surveying all nine planning grant recipients to gather their perspectives on planning insights and key lessons learned. These surveys were supplemented by follow-up interviews with participants when necessary.

## Project Design and Overview

### Key Dates and Milestones

- July 2002— Brainstorming discussions begin
- Sept. 2003— 3 Regional planning meetings
- Oct. 2003— CFAA development and RFP release
- Nov. 2003— Planning proposals due—19 received
- Dec. 2003— Approval and announcement of grant awards to 9 communities
- Jan. 2004— Planning projects began
- Jan. 2004— Initiative wide meeting
- April 2004— 1st round of TA conference calls
- May 2004— Initiative-wide meeting
- July 2004— 2nd round of TA conference calls
- Aug. 2004— Initiative-wide meeting
- Oct. 2004— Community Profile Due
- Oct. 2004— Proposal due
- Dec. 2004— Grantees notified

The Communities for All Ages (CFAA) initiative resulted from a convergence of ideas being developed at the local and national levels. In Arizona, a series of conversations regarding programming for young and aging adults as well as the desire to bring these two populations and program arenas together had begun at ACF. Nationally, the Temple University Center for Intergenerational Learning had created a framework for the Communities for All Ages concept and was exploring ways to operationalize the idea in a specific geographic area. The initial development of this community building approach was supported by the Annie E. Casey Foundation.

## LOCAL DISCUSSIONS

CFAA's evolution and development was highlighted by substantial, formative input from community-based organizations regarding the challenges associated with better integrating these arenas and eventual philanthropic approaches to solutions.

The initiative was, in part, an outgrowth of a series of meetings sponsored and hosted by ACF during the summer of 2002. These meetings were attended by representatives of senior services and youth development organizations in Arizona. The intent was to explore ways to bridge these two fields at the local community level. Through these meetings it was discovered that there was a need and interest in developing an intergenerational agenda and constituency that could advocate for better programs, policies, and budgets affecting these populations.

**Partners:** A number of public and private groups were invited to brainstorm with ACF regarding ways to bring these fields together. Meeting participants included representatives of Generations United, a local community collaborative, a public library support organization, municipal parks and recreation department, aging services, children's services organizations, and charitable foundations.

These meetings were facilitated by John Oyler of the Institute for Cultural Affairs, a consultant to ACF who has a history of working on community planning, meeting facilitation and youth development initiatives. ICA staff remained involved in CFAA throughout the initiative launch, planning phase, and program implementation.

During the first several brainstorming sessions, participants provided suggestions of other organizations that would be invited to join the discussion. As happens with most groups, a few partners took very active roles in the initial idea development while others participated less intensely. Throughout this phase, the meetings and work were staffed by ACF.

**Topics:** By the second brainstorming session, the number of participants had expanded and the group began a visioning process to identify the range of possible intergenerational activities. Early ideas included raising awareness of services, work and volunteer opportunities, creating public support for intergenerational planning, creating an intergenerational network, creating a social marketing campaign around intergenerational issues, and improving assessment and evaluation.

However, the notion of raising awareness of the concept of intergenerational community planning kept recurring as a key theme. The group decided that ACF should support a multi-site intergenerational initiative. In addition, the group recommended holding regional awareness-building meetings to launch the initiative.

## CONVERGENCE WITH NATIONAL CONVERSATIONS

Over the past decade, there has been a significant increase in the number and range of intergenerational programs across the United States. However many of these programs are unable to be sustained over time because they are not part of larger community-wide initiatives. Dr. Nancy Henkin, Executive Director of the Temple University Center for Intergenerational Learning, who had been at the forefront of thinking and writing about intergenerational programming, began to think about what a community that could truly support all generations would look like. Through focus groups with experts in the aging, youth, and intergenerational fields and a review of research on elder-friendly, youth-friendly, and Comprehensive Community Initiatives (CCI's), Dr. Henkin created a framework that included core values and elements of a "community for all ages." Donna Butts, of Generations United, worked with Dr. Henkin on developing ways to frame and promote this new way of thinking.

Bruce Astrein, Senior Vice President for Programs at Arizona Community Foundation, had previously known about Dr. Henkin's work and had worked with Donna Butts on other projects. He began speaking with these two national leaders about exploring intergenerational programming in Arizona. During the time when the local organizations were brainstorming, these national leaders happened to be in Arizona on other business and arrangements were made for them to meet with a variety of foundation and organizational representatives.

Based on the input from the brainstorming meetings and the additional conversations with national consultants, ACF decided to launch a multi-age initiative. The initiative would be based on Dr. Henkin's emerging work and shaped by a planning team that included: Bruce Astrein and Suzanne Quigley, of the Arizona Community Foundation; John Oyler and Nancy Bowan, of Institute for Cultural Affairs; Dr. Henkin of Temple University; and Donna Butts, of Generations United.

Even at this early stage, a three-phase project design was clear—phase one would launch the effort with regional meetings; phase two would provide grants to a limited number of communities for planning; and, phase three would provide a limited number of implementation grants to successful planning grant applicants.

## **PHASE ONE: CONVENING REGIONAL MEETINGS**

The planning team believed it was essential to begin this initiative by raising awareness of the concept of a Community for All Ages while also gauging interest in pursuing the idea. The planning team believed these meetings were essential because working cross-generationally was going to be very new territory for some communities and the team wanted to be sure there was sufficient understanding of what working intergenerationally really meant.

In September 2003, three forums were held across Arizona to gather information and spur dialog about what a community designed for, and with, older adults and youth would look like. Planners recognized that three meetings were essential as Arizona is a large and diverse state and getting local participation required holding meetings regionally. The meetings were held in a Northern Arizona location (Prescott), a Central Arizona location (Tempe) and a Southern Arizona location (Tucson). More than 300 people attended these meetings statewide.

**Meeting Format:** Each of these meetings followed a similar structure, including:

- *National Experts:* Presentations by national experts (including Dr. Henkin and Donna Butts)
- *Examples of Intergenerational Community Initiatives:* presentations by communities that had taken this work on in other parts of the nation (e.g., City of Dunedin, Florida; San Diego County, California; and Bloomington, Indiana).
- *Breakout Sessions:* participants had the opportunity to work in small groups to discuss one of five thematic areas. The thematic areas included discussions concerning cultural institutions, infrastructure, civic engagement, and family support. These breakout sessions were designed to provide participants with a mini planning session and give them a taste for the planning phase. At the end of the meeting the small groups were asked to report back on the highlights of their discussion. In addition, participants were asked to undertake some initial "visioning" of what a community of all ages would look like.

This format—national speakers, model programs, small group planning—created much excitement among participants and motivation to work on these concepts further.

Eight of the nine community coalitions that ultimately received a Communities for All Ages planning grant attended these regional meetings. They reported that the regional meetings provided a wealth of information on intergenerational thinking and approaches. In addition, participants felt inspired to take on the challenge of thinking about their community differently.

## PHASE TWO: REQUESTING PROPOSALS, SELECTING SITES

Shortly after the conclusion of the regional meetings, ACF staff, with the assistance of the national consultants, developed a request for proposals (RFP). The planning team believed that a planning grant was critical to ensure that communities really began to think about services and communities differently, had opportunities to dialog and process the information, and had time to work on developing new approaches.

During the process of developing the plan to operationalize the Community for All Ages concept, several themes emerged as critical. They were reflected in the RFP:

- **Collaboration**—to truly achieve a Community for All Ages, the planning and development couldn't be undertaken by a single institution. ACF and the initiative planners believed it was critical that a local community coalition drive the process. Further, it was hoped that individuals beyond the “usual suspects” (government or community-based organizations) would participate. That, for example, youth and older adults would sit at the table as partners in planning for community change.
- **Real Integration**—to truly achieve a Community for All Ages, local sites would need to move beyond simply co-locating services for adults and youth. This initiative was asking them to think deeper and harder about what it would mean in their local context to truly integrate, meet needs across generations and build a community environment responsive to all ages.
- **Place-Based**—because building a Community of All Ages must be done in consideration of local strengths and weakness, it was clear that a model could not be appropriated from elsewhere and installed in Arizona. It was critical that each community grapple with identifying their population and service challenges and strengths to develop a plan that very specifically addressed their local needs. Another major theme in the early phases of the project that was reflected in the RFP was a sense among ACF staff and lead consultants that the initiative needed to provide a clear framework for the CFAA idea, but be flexible enough to allow communities to adapt this to their own circumstances. So, for example, the RFP did not define what geographic boundaries comprise a “community.” Rather this was left to the applicant coalition to determine. The RFP asked applicants to detail the capacity of the lead organization to undertake the project, note the strengths of the collaborative partners, provide a profile of the community, describe their vision for a community for all ages, delineate the methods they believed they might use in planning, and propose a timeline and budget narrative. They were given background information on the core values and elements of a CFAA.

**Selection of Sites:** Nineteen proposals were received from communities across the state. A selection committee was formed comprised of ACF staff and consultants (Donna Butts, Nancy Henkin, John Oyler), two donors, and a representative of a community-based organization.

Formal selection criteria included evidence of a commitment to engaging a wide range of community stakeholders, active participation from a variety of institutions, articulation of clear and reasonable planning steps, a range of proposed assessment methods, and evidence of the lead agency's capacity to undertake the project.

In determining which communities would be chosen, the selection committee was aiming for a balance of:

- Geography—some rural and some urban sites
- Socio/economic status—some economically depressed communities and some more prosperous communities
- Ethnic and racial diversity
- Readiness to take on the planning process

After much deliberation, the selection committee awarded nine planning grants. Each site received \$10,000. Below is a very brief summary of the nine CFAA planning grant sites.

- **Ajo**—located in an economically depressed region of rural southern Arizona, the lead grantee was the International Sonoran Desert Alliance. They proposed to bring together a coalition of County services, schools, libraries, health center, private industry, Native American organizations, arts organizations, and early childhood organizations.
- **Central City South, Phoenix**—located in urban Phoenix, the lead grantee, Phoenix Revitalization Corporation, proposed to build on an existing collaborative. The effort proposed to bring together a coalition of City of Phoenix Human/Senior/Youth Services, libraries, educational organizations, hospital, non-profit economic development organization, public service association, a private energy provider, and a University design program.
- **Concho**—located in Arizona's rural northeastern White Mountains, the lead grantees were Big Brothers Big Sisters of Northeastern Arizona and Concho Elementary School District. The effort proposed to bring together children/family/parent groups, schools, and the Elk Foundation.
- **Douglas**—located at the U.S-Mexican Border, the lead grantee was SouthEastern Arizona Behavioral Health Services, Inc. The effort proposed to build on an existing human service coalition consisting of health services, family resources, religious services, and schools.
- **El Mirage/Phoenix**—located in urban Phoenix, the lead grantee was the City of El Mirage and proposed to bring together City Community Services Department, Arizona Public Services, Catholic Social Services, schools, community center, health services, Chicanos por la Causa, and children/teen services.
- **Golden Gate/Phoenix**—located in urban Phoenix, the lead grantees were Arizona Children's Association and the Golden Gate Community Center. The effort proposed to bring together Governor's Council on Aging, community groups, schools, City Fire and Emergency services, senior programs, and youth programs.
- **South Park/Tucson**—located in urban Tucson, the lead grantee, Pro Neighborhoods (a neighborhood development and engagement non-profit), proposed to bring together City Community Services Dept., United Way, community youth groups, neighborhood association, schools, Urban League, and the community development network.
- **Tempe**—located in the metro-Phoenix area, the lead grantee was the Tempe Community Council. The effort proposed to build on several pre-existing planning efforts bringing together College of Nursing, public library, City social services, community organizations, hospital, Communities for Kids (an initiative of ACF), and a senior foundation.
- **Yavapai County**—located in northern Arizona, the lead grantee was Youth Count, which proposed to form a new "Generations United" effort comprised of AARP, elderly services, youth services, schools, public library, interfaith coalition, catholic services, and hospice services.

As can be observed from these brief descriptions, the nine planning grantee communities represent a mix of rural and urban environments. In addition, they represent a mix of efforts with previous planning experience as well as those with little community planning experience.

## PLANNING PHASE

After the issuance of the grant award in late 2003, sites began planning for their Community for All Ages. Although sites were not required to use specific assessment tools, they were each given a resource book containing a variety of tools (e.g. asset mapping, visioning exercises) and possible questions to ask related to each of the core elements. This approach was taken to give the sites the most latitude in their approaches and to see what might develop out of this “natural laboratory.” During the learning sessions, consultants shared a Logic Model for the CFAA concept, possible outcome indicators, and strategies for conducting needs/resource assessments.

However the sites were provided with the following background information on the intent, values and core elements of a Community for All Ages.

## VALUES

- **Interdependence:** People feel a sense of shared responsibility for one another. The age-old social compact is strong as generations rely on each other for care, support, and nurturing.
- **Reciprocity:** People of all ages have opportunities to both give and receive support; to both teach and learn.
- **Individual Worth:** Each individual, regardless of age, race/ethnicity, gender, or other characteristics, deserves respect and care, is entitled to equal access to the community’s resources, and offers an ability to contribute to the community in some way.
- **Diversity:** Differences among community members are recognized and celebrated. Efforts are made to foster understanding across diverse groups.
- **Inclusion:** Policies and programs are designed for all members of the community.
- **Equity:** Fairness is reflected in all policies and services. Advocates for the young and the old are not pitted against each other for limited resources.
- **Social Connectedness:** Social relationships are viewed as vehicles for enhancing the everyday lives of community members. Formal networks foster opportunities for connection across ages and cultures, thus building a shared sense of community.

## CORE ELEMENTS

- Support for care-giving families and dependent populations
- Policies that promote lifelong well-being and meeting basic needs
- Access to appropriate health and social services across the life course
- Opportunities for lifelong learning
- Opportunities and infrastructure for lifelong civic engagement
- Interaction across age groups
- Physical environment that promotes healthy living and supports changing needs across the life-cycle.

In addition, during the planning phase, sites were provided with examples of questions they might try to address in the planning process.

## **SUMMARY OF PLANNING APPROACH:**

Each site undertook a unique discovery and planning process. Here is a summary of the common planning elements and themes.

**Core Elements Addressed:** Sites addressed a variety of Core Elements. Most common were physical environment (7 sites), lifelong civic engagement (7 sites), lifelong learning (6 sites), and cross-age interaction (5 sites). One site addressed all seven core elements.

**Institutions Involved:** Almost all sites formed a coalition of organizations that included local city and/or county government (including Parks and Recreation Department), non-profit service providers (including youth groups, parent support groups, senior centers, behavioral health services, AARP and others), neighborhood centers, schools, youth and senior services, and health providers. Three of the nine sites invited “unaffiliated” community residents, including youth and adults, to participate in the planning process. Three sites worked with faith-based groups, three worked with public libraries, and two sites worked with the local arts council.

**Planning Process:** All sites formed committees (called planning team, core advisory team, core leadership team or steering committee) to plan and direct activities of the group. Two sites formed sub-committees to perform specific functions. For example, in Central City South, one of five “work groups” (the evaluation work group) assessed the planning teams’ process and created an additional communication subgroup to facilitate communication about the project among the team and the community. This subgroup created a webpage for the progress of CFAA.

**Data Collection Methods:** In forming their community assessment, sites were advised to undertake an assessment of the needs, problems, and desires of residents. Sites used a variety of mechanisms to collect this information, including:

- **Focus Groups:** All sites utilized focus groups (one location called it House Meeting) as part of their data collection process. These focus groups yielded varying results. For example, one rural site reported a failed focus group attempt while an urban site held 14 focus groups reaching 150 youth, seniors, parents, and adult caregivers. Focus groups generally asked participants to identify and evaluate services and opportunities available in the community as well as what specific things they would like to be different. Four of the sites (two urban, two rural) conducted bilingual focus groups.
- **Surveys:** Seven of nine sites conducted surveys of youth and older adults. Two sites reported surveying “families,” another two sites surveyed service providers. One group distributed the survey through the City water bill with an impressive return of 472 responses. Four sites conducted bilingual surveys, including: a bilingual survey for older adults distributed in a border community, and a bilingual door-to-door survey conducted at an urban site. Surveys asked similar questions as the focus groups, generally having participants identify and evaluate services and opportunities available in the community while also identifying specific things they would like to be different. One site asked community members to list their personal assets and whether they would be willing to share their experience with the community at large.

- **Other Methods:** Five sites mentioned holding community meetings/workshops with community members. Seven sites conducted asset-mapping sessions, where participants and/or committee members identified the resources and services currently available in the community, as well as the specific service gaps of their community. Five sites mentioned consulting key informant/stakeholders of the community (business owners, media, schools, government, faith communities, interest groups, non-profit services) either through surveys, interviews, or meetings.

In addition to these sources, all sites gathered census, city/county planning and service participation information to help develop a statistical picture of their community. (Available data collection tools can be found in Appendix B.

**Major Needs/Challenges Identified by Planning Teams:** Here are some of the common and different issues identified by community representatives:

- Six sites identified a need for a youth/intergenerational center to provide a safe place for youth to spend time.
- Five sites identified a need to involve the Spanish-speaking population in community planning. Four of the five sites used bilingual tools for outreach (surveys, forums, notices).
- Five groups identified a lack of awareness of services as a major challenge to their community.
- Five sites identified employment opportunities as a primary challenge in their community.

Other challenges included: isolation/lack of services due to rural locations, high high-school drop-out rate, lack of low-cost health services, high population of grandparent-led households, high transient population, high crime rate, transportation concerns, sub-standard housing, high population growth, lack of involvement between groups in community (new immigrants and established families, Native American and Hispanic), non-legal residents, and no cooperation/communication between existing social services/programs.

## REFLECTIONS ON THE PLANNING PROCESS

At the end of the planning phase site teams were asked to reflect on the strengths and weakness of the process, working with youth and older adults, planning challenges and successes, and lessons learned. As can be expected from nine unique coalitions undertaking nine unique processes, their reflections on the planning processes ran the gamut.

**Planning Teams:** Sites were asked to reflect on the successes and challenges of the teams brought together to implement the planning grant. In terms of planning there was a basic split across the groups—those that had previous planning experience and those that did not. Sites with already established coalitions felt that the pre-existing team enabled them to start the process on strong footing rather than having to spend time building new relationships. The sites without pre-existing collaborative efforts acknowledged having difficulties centered around scheduling, delegating duties, and establishing a common vision early in the process. Four sites found most team members had few resources/staff, little additional time to give to the process, and a need for additional monetary support.

**Working with Youth/Older Adults:** Sites were asked to reflect on the challenges and successes of working directly with youth and adults to shape the planning process. Sites approached working with youth and adults in a variety of ways—from working with adults and youth to collect “data” to working with youth and older adults as an opportunity to cultivate an intergenerational community feeling. For example, four sites had youth and/or older adults serve on the CFAA planning committee. More commonly, sites reached out to youth and older adults through focus groups and community meetings.

Sites reported varying degrees of success in engaging youth and older adults. For example, three groups had no difficulty engaging youth and older adults through focus groups. Five groups found greater difficulty engaging youth because they were busy with school, lost interest in the project or expected to be disappointed with the results. In addition, these teams reported that reaching the “hard to reach” youth was a challenge.

**Amount of Planning Time:** Sites were asked if the planning period was sufficient to accomplish their goals. Almost all groups said there was sufficient time for the process. However, the sites noted that planning never really stops and that more can always be accomplished. Two sites mentioned needing additional time to adequately prepare reports and the proposal required by ACF.

**Planning Challenges and Successes:** Sites were asked to reflect on the challenges and successes of planning for a Community for All Ages. Sites noted that advancing and staying focused on CFAA concepts was time-consuming and complex. They also cited a lack of leadership and conflicts among leaders at the local level slowed planning and difficulty getting local residents and/or social service agencies involved while building trust in the process. In addition, some sites indicated that lack of direction and changing expectations for planning was frustrating.

Planning successes included a sense of being able to bring the community together in dialog about an issue, team collaboration and involvement, and an ability to focus on the assets of the community. In addition, some noted that they felt success in simply completing such a daunting task with little previous experience.

**Community Context:** During the planning phase it became clear that sites were grappling with basic issues such as who to have on their planning team and what data collection methods to use.

To get a better handle on the degree to which “community context” shaped projects, sites were asked to identify if there were aspects of their community’s composition, demographics or history that led them to make specific planning choices. Sites reported that language was a dominant cultural feature that led them to undertake specific approaches. For example, some sites needed to hold bi-lingual meetings and have surveys translated. However, some also found that there was a cultural (not just linguistic) element to this. For example, several sites found that Spanish-speaking elders preferred to talk individually with community members rather than complete surveys. One site reported that this “face-to-face” interaction was part of the trust building and exchange that was necessary to obtain real participation. Interestingly, other, predominantly rural locations, found that surveys were very effective means to reach residents in far-flung corners of their community.

## OBSERVATIONS

Because these nine planning grant communities are different and the processes they undertook are somewhat unique, it can be difficult to draw conclusions across the group. However, two cross-site features emerged that merit additional exploration.

- Previous Coalition/New Coalition**—The differences between the sites that built on a previously existing coalition versus those that had to build the effort “from scratch” were noticeable. The groups that built this planning project into an already existing effort had greater early success in getting organized and outlining expectations. These sites utilized previously existing communications, facilitation processes (and facilitators), and easily conceptualized their work plan and divided into workgroups. This previous collaborative experience did not exempt them from struggling with planning; it simply provided them with a firmer base from which to begin. The sites that began CFAA by developing a new coalition spent much time working on who would be at the table and how they would operate. Generally, these groups struggled to establish a clear vision and expectations from the beginning. These sites also expressed that the members of their team were very busy and had difficulty finding times to gather to move the project forward. While these groups had a somewhat more difficult time getting off the ground, they were more likely to include youth and older adults in the actual planning process. In addition, some of these new collaboratives have used this new model to undertake additional projects. Interestingly, the groups who started from “scratch” seemed to be able to stay truer to the CFAA mission than the groups who started with existing coalitions.
- Other Features**—Interestingly, other features played less of a role in differences found in planning approaches and experiences. For example rural and urban differences were less pronounced than one might have expected. While rural sites described difficulty reaching residents in remote areas, it was also a challenge for urban sites to gather the perspectives of residents. In addition, while the size of the “community” selected affected data collection strategies, it did not seem to affect challenges faced or ability to produce a planning document.

## EARLY IMPACT

While these planning grants were made explicitly to provide sites an opportunity to reflect on their community and plan for potential multi-generational activities, some sites moved quickly and naturally to take advantage of newly formed alliances and building momentum.

First and foremost, each site described a deeper and broader understanding of their community, the needs of youth and older adults, community resources, and the potential of developing intergenerational connections. In addition, sites described other early “outcomes,” including:

- A rural site reported an announcement by the County Supervisor of funding for a year-long, monthly newsletter, as well as purchase of land for an Intergenerational Community Center. The site attributes these advances to the increased awareness of intergenerational opportunities among community leaders.
- Two sites completed a local social services resource directory for the community.
- One site designed a community planning tool that was used by five smaller planning efforts in the community.
- During interviews with community members in one site, several needs emerged including English as a Second Language courses and opportunities for older adults to mentor youth. The local Urban League, a partner in CFAA planning, decided to provide these services.
- Four sites reported developing additional projects with their planning team as a result of coming together and developing relationships and community understanding.

## INITIATIVE COORDINATION AND TECHNICAL ASSISTANCE

From the earliest stages of the Community for All Ages initiative, ACF knew that Technical Assistance (TA) would be necessary. Because the sites represented vastly different communities, came with substantially different levels of skill and experience, and faced different challenges, developing the TA package was a challenge. Further, because ACF wanted to provide the greatest degree of flexibility and latitude possible to CFAA participants, there was a reluctance to over-prescribe approaches or over-advise the projects. However, several forms of TA were available, including learning community meetings, on-site trainings and facilitation assistance, TA conference calls with consultants, and information regarding planning grant expectations and deadlines.

A team of TA providers was assembled to assist grantees. This team included:

- **ACF Staff**—Throughout the development and implementation of the planning project, ACF staff were at the center of technical support and messaging to sites about CFAA. ACF staff produced materials describing the intent of the initiative that were used by sites. Staff was available to answer questions from sites regarding CFAA focus, grant requirements, processing, and resources. And ACF played an important role in signaling the import of this work—both within the foundation and across the state. During the planning phase there was a change in ACF program staff overseeing this project. This transition does not appear to have negatively influenced planning grantees, as none indicated confusion over staffing of the project within ACF.
- **Temple University**—The role of Temple University Center for Intergenerational Learning (Dr. Nancy Henkin) included working with ACF staff to plan the regional meetings, develop the planning and implementation grant RFPs, design learning community meetings, and provide telephone technical assistance to grantees. Her ongoing refinement of the CFAA model guided the initiative as it moved through the planning process. Dr. Henkin's role was envisioned as a resource on CFAA design as well as being available to provide sites with support on substantive issues.
- **Institute for Cultural Affairs**—ICA (John Oyler and Nancy Bowen) participated in initiative planning and the development and facilitation of the regional meetings. After the planning sites were selected, ICA was contracted to provide two days of TA for each site. It was envisioned that ICA would work directly with sites on planning and analysis as well as capacity building and training.
- **Native American Connections**—Because a number of sites were operating near Native American Indian reservations, ACF contracted with Native American Connections (an organization dedicated to strengthening native nations, including bolstering their connection to non-native community efforts) to provide technical support to sites reaching out to tribal members.

## LEARNING COMMUNITY MEETINGS

During the course of the planning phase, three initiative-wide meetings were held in Phoenix. These meetings were convened for several reasons:

- hope that these disparate communities would form the beginning of a statewide network interested in intergenerational planning;
- hope that the sites would learn from each other and develop cross-site partnerships;
- a sense that because the ideas and concepts presented in the initiative were so new, there needed to be time to reiterate the purpose and check-in on the sites' understanding; and

- based on previous experience, ACF knew that the sites would need mid-grant “check-in points” to ensure that planning was happening and uncover any problems before they reached the end of the planning phase.

ACF staff, ICA, and Dr. Henkin all participated in the planning and staffing of the initiative-wide meetings.

Each meeting covered a slightly different topic:

- *Meeting One:* Introduced the CFAA concept and discussed the core elements.
- *Meeting Two:* Reviewed CFAA concepts and logic models, as well as explored possible outcome indicators in addition, sites provided updates on what they were learning through the data collection process.
- *Meeting Three:* Focused on exploring issues and community planning. This meeting provided guided assistance for teams to develop their Community Profile.

**Reflections on the Value of Initiative-Wide Meetings:** Sites were asked to report on the value of the initiative-wide meetings. All sites indicated that they found the meetings useful. Sites found ideas presented by other sites energizing and thought provoking. Some reported that the meetings caused team members to better understand CFAA concepts and potential assessment methodologies. One site suggested traveling distances as a team together strengthened and reaffirmed the group.

While the initiative-wide meetings presented apparent benefits to sites, some did note inherent “competition” at the meetings. They identified an undercurrent of competition among the groups, especially when asked to present their planning in progress. However, no site indicated that the slight discomfort felt at some of the meetings outweighed the benefits to the team. Indeed, some commented that the slightly competitive element encouraged them to undertake additional planning activities.

Sites also commented that the most valuable moments in the initiative-wide meeting were ones that really connected CFAA concepts to the work of the groups. For example, in the third meeting, teams spent time hearing about concepts and brainstorming with their team members about what information they had on the topic and additional work they would need to do. Many sites found these project-specific exercises very helpful. Several sites remarked that they would have preferred more specific information regarding the Community Profile earlier in the process, perhaps introduced earlier than the third initiative-wide meeting.

## TECHNICAL ASSISTANCE TO LOCAL SITES

As described above, a team of national and local consultants was amassed to provide TA to CFAA sites. While these sites had quite different approaches, many required a similar kind of assistance: to help move their coalition through planning toward action. In addition, a number of sites asked for assistance getting the broader community involved in the planning process. While the sites were familiar with the core components of a community for all ages, many did not know how to take each concept and turn it into action.

- **Institute for Cultural Affairs**—While all sites were alerted to the availability of ICA from the start of the grant, an official introduction to ICA and services available was planned for the first initiative-wide

meeting. As one site had a previous relationship with ICA, the site contacted ICA very early in the process to request assistance in planning and shaping their project. This turned out to be fortuitous because ICA was able to describe this experience at the first initiative-wide meeting in very concrete terms. This provided a good example of how ICA could work with each site.

While ICA was available to all sites, eight of the nine planning grantees took advantage of this opportunity. During site visits, ICA provided planning support, meeting facilitation, capacity building, and was available to troubleshoot other issues.

While one original intent of ICA's services was to provide capacity building for local community partners to undertake and sustain planning efforts, no groups identified this as a need. ICA believes that this was a need, but the sites were so focused on getting through the planning process they were not able to see the longer-term needs that could be addressed through capacity building.

In addition to working directly with sites, ICA also provided support to ACF through reviewing proposals and Community Profile documents, and developing and staffing initiative-wide learning sessions.

- **Temple University Center for Intergenerational Learning**—Dr. Henkin provided input in initiative design and RFP creation, reviewed the Community Profiles, and assisted in the development and implementation of the learning session. As part of her activities, Nancy provided assistance to ACF staff. In addition, each group was informed about Nancy Henkin's expertise and availability. However, sites rarely called on Dr. Henkin to discuss substantive issues. Indeed, four sites reported calling her for TA during the nine-month planning process. For some of these sites, she reviewed data collection tools. One potential reason why more sites did not call upon Dr. Henkin is that she is located out of state. While Dr. Henkin's expertise might not have been extensively utilized at a distance, sites did turn to her for advice during the initiative-wide meetings. At these meetings, they had exposure to the intergenerational logic model, were able to ask specific questions about their planning projects, seek feedback from her, and obtain advice from a national perspective.
- **Native American Connections**—while Native American Connections did attend two of the three initiative-wide meetings, no site contacted them for support in reaching out to tribal members.

## TECHNICAL ASSISTANCE CONFERENCE CALLS

During the nine-month planning process it became clear that few sites were identifying their technical assistance needs or regularly reaching out to TA providers for assistance. In about the fourth month of the planning phase, ACF decided to hold conference calls with each site to talk about project progress and potential needs. The three primary TA providers (Jacky Alling at ACF, John Oyler at ICA and Nancy Henkin at Temple University) all participated in calls.

The calls also were an opportunity to reiterate the intent of the grant, gather updates on the sites' planning progress, determine if special assistance was needed, and alert sites to what would be expected at the initiative-wide meetings. Staff found these calls very instructive because they spotlighted a number of issues the sites faced, including:

- While some sites had begun to collect data on the needs of the community, most were so deep in the process that they were having difficulty seeing the patterns and trends as well as what else needed to be collected.
- Some sites were having difficulty moving beyond a brainstorming phase.
- Some sites identified challenges with data collection processes—focus groups were not well attended, sites experienced difficulty distributing and retrieving surveys, etc.
- Some sites had difficulty conceptualizing how to work across the age span.
- Some sites were focused on a very narrow range of intergenerational activities rather than thinking more broadly about support for the approach in the community.

A second round of technical assistance conference calls were placed to sites in mid-summer 2004. Again, these calls were an opportunity to touch base on the projects and determine if any special assistance was needed. While there was great variation across the nine planning grant sites, a universal theme did emerge: sites were having difficulty putting together all the pieces of what they were learning. They needed a framework for, and assistance in, understanding all they had learned and how that would translate into a three-year plan. Their comments helped to redirect the actions of the staff and consultants and resulted in developing guidelines for the Community Profile and changes in the content of the learning sessions.

Interestingly, some topics did not arise as part of TA. For example, no site asked for assistance in designing their surveys or focus group questions. Unfortunately, some sites found that they hadn't asked all the questions that they might have or worded questions as clearly as they should have in their tools. Upon reflection, TA staff and some sites agreed this was an area that could have merited some additional technical assistance.

While it was somewhat grueling for primary TA providers to participate in these calls, full participation turned out to be critical for several reasons. Full participation ensured that all members of the TA team were providing the same advice and messages. This was particularly critical as a new staff member at ACF, with little history in intergenerational approaches, had taken over responsibility for CFAA. In addition, participation provided the whole TA team with an opportunity to hear all the concerns and challenges faced by grantees and structure initiative-wide responses.

## REFLECTIONS ON TECHNICAL ASSISTANCE

Sites were asked to comment on the amount, depth, quality and amount of TA available as part of the CFAA planning grant. A difficulty with assessing TA and, indeed with providing TA, is that individuals and groups rarely recognize all of the assistance they might need. They don't necessarily realize that they could be doing something better if they only had some additional support or training.

All sites found the TA provided useful and most noted that they did not need any more than what was received. Only one site reported that they could use much more support. Several sites praised the assistance of ICA as a mentor to the team and process.

A few areas of additional assistance included:

- While most sites did not feel the need for additional site visits, a few of the rural sites indicated that additional site visits would have been helpful to strengthen the planning process.

- Some sites called for greater assistance in working with census and other datasets, and assistance engaging a broader set of community representatives.
- A number of sites called for greater clarity of expectations and desired outcomes sought by ACF. These sites would have liked more detailed explanations of what was expected in the community profile and RFP earlier in the process.

## IMPLEMENTATION SITE SELECTION AND PROPOSED SUPPORTS

### The Selection Process

Arizona Community Foundation staff was pleased with the development of the planning phase. They were interested in not only providing an opportunity for certain communities to take this work to the next level, but also interested to develop a network of communities interested in and exploring intergenerational programming. Because of these interests, and due to securing some additional resources, ACF staff decided to provide expanded support to at least four organizations as well as continuation planning grants to a number of sites.

The selection process followed the same course of most of ACF's grant rounds. A Selection Committee was formed consisting of Nancy Bowen of ICA, Patricia Goubeaux, a consultant to ACF, Dr. Henkin of Temple University, and Michael Kelly an ACF Board member. ACF staff and Dr. Henkin set review criteria to be used by the Selection Committee. The grant applications were reviewed and scored by the Selection Committee. Then, the committee met to discuss each proposal and applicant organization.

There was a fair amount of consensus among the Selection Committee members. There was a general sense as to the strongest and most interesting proposals, as well as the weakest proposals. There was general agreement as to which applicants were ready to implement proposals and which ones still had some planning work to do in order to be considered for expansion.

### Summary of Implementation Sites

The Selection Committee decided to provide implementation grants to five sites and continuation planning funding to three sites. One site received no additional financial support.

Below, we summarize briefly the five sites that received implementation grants:

- **Concho**—Spearheaded by Big Brothers/Big Sisters of Northeastern Arizona, the community of Concho seeks to develop a “community where there is integrated involvement and independence between all community members, resulting in community pride and ownership.” Their goals include reuniting fragmented youth population, uniting an isolated adult and senior community, bringing children and older adults together through mutually rewarding programming, and creating a stronger sense of community. While the Concho team seeks to undertake a variety of activities to impact these goals over the three-year grant period, the heart of the project lies in the securing of space to develop a community center. It is hoped that this community center will be the hub of activities as well as an informal, multi-generational gathering place. Additional strategies include, the publication of a monthly community newsletter, collaboration among community partners in the development and implementation of programs, creation of an annual calendar of community events, development of an “highly visible, outdoor” mural project to enhance the physical beauty of the area, and implementation of a mentoring program.

Arizona Community Foundation Grant funds will be used to secure a lease for the community center, computer/office equipment, and scholarships for students to design a community mural. In addition to grant funds, the Concho team will secure volunteers to staff most aspects of the project, has secured some county funds to offset the costs of the space lease, secured donations of office furniture and printing supplies. In addition, a local nonprofit will provide half of the funds for the mentoring program. Many other public and private entities have pledged support.

- **Ajo**—Spearheaded by the International Sonoran Desert Alliance, the Ajo team seeks to “create a vibrant multicultural and multigenerational learning center....that provides a full spectrum of motivational and educational activities.” Their goals include implementing a variety of programs that bring people together across cultures and generations to learn and create, to plan and develop vocational educational programs in culinary arts, and in the automotive and construction trades, and to develop three buildings on the Curley School campus as a permanent home for the learning center and its programs.

As can be seen from the goals, the Ajo Team’s focus will be on the development of a new multiuse space housed in the historic Curley School campus. To make this a truly community-wide, multigenerational asset, the team envisions planning for and providing a variety of programs including GED, ESL and citizenship classes, work mentoring, youth leadership training, creative classes that bridge generations, artisan education, etc.

Arizona Community Foundation grant funds will be used to support the programming and activities, plan the construction education project, and secure and develop the temporary portable buildings. The major costs of securing the space and personnel have been donated by team members and public officials in Ajo. For example, the majority of the costs to secure the Curley School space have already been donated.

- **Tucson/Southpark**—spearheaded by PRO Neighborhoods, an organization dedicated to community revitalization through active community participation, the Generations Unidas project of the Southpark Neighborhood seeks to create a community “that looks and feels like a vibrant and resourceful place, where people of all ages are working and playing together in comfortable community spaces.” Their goals include increasing the number of residents of all ages, ethnicities, and genders who are represented in decision-making for their neighborhood development, increasing involvement in the design and implementation of programs, encouraging residents to share talents and resources, increasing diversity of people connected to the community, more community designed and run programs, and developing an arts and cultural center to offer options for all ages.

As can be seen by the above goals, the Tucson team’s core focus is to create greater community involvement across the ages in community decision-making. To accomplish this the team anticipates undertaking a variety of activities including community-designed neighborhood redevelopment, holding community events of celebrations planned by residents, engaging in leadership development, holding intergenerational classes, and developing a neighborhood advisory committee for the Cultural Center. In addition, small, intergenerational projects will be designed by community members and receive special mini-grants to assist with implementation.

The Tucson team will specifically use the funds to hire a full-time Neighborhood Coordinator to work with Southpark residents, support the mini-grant program, and support the costs of meeting facilitation. In addition, the program has secured donations including funds for additional personnel, training, computers, travel, and matching funds for the mini-grants.

- **Golden Gate**—Spearheaded by Arizona Children’s Association, the Golden Gate project seeks to develop a community center that “empowers community members of all ages to create safe, healthy environments that are hopeful and vibrant with connections across generations and cultures.” Their goals include changing how people think about and function in their community, providing more services and opportunities for cross-generational interaction, increasing knowledge of and satisfaction with access to community services, and having people working together who had not previously done so.

The Golden Gate team anticipates undertaking a variety of activities to improve and expand the existing Golden Gate Community Center. The project will focus on coordinating current resources to improve safety, providing community education activities, informing residents regarding available community resources, and facilitating an increase and expansion of community intergenerational resources focused on health/mental health.

The Golden Gate program will use ACF grant funds specifically to hire an intergenerational coordinator, support advisory committee meetings, support portions of other staff members including a volunteer coordinator, a health care coordinator, and a family coordinator. In addition, the program envisions using grant funds to purchase materials, a computer, and support youth stipends. In addition to these funds, the program anticipates donations including staff time, space, and donations to improve the facility.

- **Yavapai**—Spearheaded by Youth Count and the Generations United coalition of Yavapai County, this project seeks to create a community where “residents will see people of all ages as equal partners in building a compassionate and viable community, where all generations thrive and each individual’s needs, talents and strengths are valued, respected and engaged.” The Yavapai project centers on the development of a countywide support system that will assist local communities in undertaking intergenerational projects. Their goals include building on their partnerships, promoting leadership in the coalition, supporting several communities around the county to implement projects, and creating partnerships among community institutions.

While the Yavapai project was approved as an implementation site, ACF and grant panelists decided to provide a slightly lower level of financial resources, to require a local match, and require that the effort develop a more geographically targeted plan. This somewhat different approach was taken on because all acknowledged that the Yavapai team had embraced the concepts of a community for all ages, but needed to put additional thought into a specific proposal. Yavapai team members will be working with ACF over the next few weeks to develop a revised proposal.

**Summary:** Interesting seminars and some differences are seen across the five implementation suites. For example:

- **Physical Space**—Four of the five implementation grantees proposed to develop physical places within their Communities for All Ages activities. For at least three sites, the physical location is the core of the implementation plan.
- **Community Engagement**—All sites seek to better engage residents of all ages in creating solutions to community problems. However, for one site this engagement is the core of their implementation plan.
- **Geographic Focus**—The implementation sites run the gamut of geographic locations—from a county-wide plan to a neighborhood-based plan.
- **Communication**—At least two sites have proposed developing specific communication vehicles (newsletters, etc.) to help raise awareness of events and create connections among residents.

- **Ages specific and Intergenerational Activities**—Each site has proposed to undertake both age specific activities as well as intergenerational activities.
- **Role of Cultural Activities**—Interestingly, each site has proposed to incorporate cultural activities as a natural activity to bring groups of all ages together.

### Continuation Grantees

In addition, to the implementation grants, Arizona community Foundation decided that the remaining four sites (El Mirage, Central City South, Tempe and Douglas) should receive an opportunity to continue planning and working toward the building capacity to be ready to implement full projects. ACF staff will be working with these sites to identify specific pieces of their proposals that the sites would like to pursue.

### Supports Offered to Sites

Through the Community for All Ages planning process, Arizona Community Foundation learned about the importance of strategic technical assistance as well as the value of network opportunities. While the package of financial support available to sites varies, it was felt that all sites, and indeed the state as a whole, would benefit from the continuation of a statewide network focused on promoting a community for all ages.

Implementation Sites—Sites selected to implement projects will be provided a variety of resources, including:

- **Monetary**—Each site will receive a \$50,000 grant per year for three years from the Arizona Community Foundation. For most sites, this was a traditional grant. However, in one site (Yavapai) the grant was made in the form of a challenge grant. This was done because the site needed to do some additional work on their proposed plan and demonstrate the ability to generate local support. In addition, each site has committed to raising additional financial resources.
- **Technical Assistance**—Similar to the planning phase, these sites will receive a variety of technical assistance opportunities, including:
  - *ACF Staff*—Staff will continue to provide a central organizing role, be available to answer questions related to the grant requirements and processing, as well as help grantees network.
  - *Individual Technical Assistance Plan*—ICA will visit each site and work with them to identify their individual technical assistance needs. From these conversations the TA team will help develop an Individual Technical Assistance Plan (ITAP) that will identify their needs, resources that can be provided as part of this project, as well as suggesting other resources. It is envisioned that once the plan is developed ICA, Dr. Henkin and ACF staff will work together to determine the variety of TA service available to the site.
  - *ICA*—ICA will be available to provide up to two days of on-site technical assistance for each site per year. It is envisioned that ICA will provide a variety of supports including capacity-building training, facilitation, etc.
  - *Temple University*—Dr. Henkin will be available to work with sites via telephone and hopes to visit several sites. It is envisioned that Dr. Henkin will provide troubleshooting, link sites to the work being undertaken in other parts of the country, and be able to share tools that can be used in program development and evaluation.
  - *Network*—implementation sites will be gathered three times a year for exchange and learning opportunities. All technical assistance providers and ACF will be involved in the development and implementation of these meetings. In addition, a focus will be placed on creating opportunities for sites to act as support and resources to each other via a listserv and other opportunities.

**Continuation Sites**—Sites selected to receive continuation support will be provided with resources, including:

**Monetary**—each site will receive a \$10,000, one-year continuation grant from the Arizona Community Foundation. A traditional grant was provided to all sites except Tempe where it was decided that more intensive technical assistance was needed, rather than a traditional grant. It is possible that at the end of this year sites may be able to apply for implementation grants to help them move to the next level.

**Technical Assistance**—similar to the planning phase, these sites will have access to some technical assistance, including:

- *ACF staff*—Staff will meet individually with each continuation site to discuss expectations and help sites identify an area that they may want to pursue. In addition, staff will be available to answer questions related to the grant requirements and processing, as well as help grantees network.
- *ICA*—ICA will be available to provide up to one day of on-site technical assistance per site. It is envisioned that ICA will provide support on planning, facilitation, community building, etc.
- *Temple University*—Dr. Henkin will be available to provide support to these sites via telephone. It is envisioned that Dr. Henkin will be available to provide information on efforts being undertaken across the country as well as a substantive understanding of what a community for all ages entails.
- *Network*—continuation sites will be gathered three times a year for exchange and learning opportunities. All technical assistance providers and ACF will be involved in the development and implementation of these meetings. In addition, a focus will be placed on creating opportunities for sites to act as support and resources to each other via a listserv and other opportunities.

## Communities for All Ages Learning Community

As the Learning Component of the planning phase was thought to be useful, some form of Learning Community is envisioned for the implementation phase. While the details of this are still under development, it is hoped that these sites can be brought together in a learning environment and help to build the strategies to engage others across the state in developing communities for all ages. This may take several forms including:

- **Network meetings**—grantees will meet three times a year to discuss substantive and capacity building issues.
- **Regional meetings**—it is hoped that regional meetings will be held in 2006. These meetings may be an opportunity to showcase work in implementation sites, engage the broader community in dialog, and share strategies.

## Lessons Learned

The Communities for All Ages Initiative planning phase provided an opportunity for nine local sites to learn new concepts, gather local resources, work together to learn more about the needs of the community, and build consensus regarding potential strategies to improve the lives of youth and older adults. In addition, CFAA provided a laboratory for intergenerational planning whose lessons could be exported to other communities. While the learning is still underway, several key lessons have emerged, including:

- **Value of Regional Meetings**—There is almost universal consensus that the regional meetings held at the beginning of this process provided valuable opportunity to share new information and build excitement around intergenerational planning.

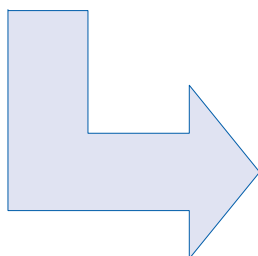
- **Value of Planning**—Given the newness of this concept, the isolated nature of adult and youth community resources, the varying level of expertise in communities, and a real interest in approaching planning differently, having a planning period was critical. All participants agree that much was learned about working across the lifespan, community needs and assets, and working collaboratively during the planning phase. Further, the cohesiveness among team members built during the planning phase should serve them well in future endeavors. Finally, while it was not expected, bringing together community members served as a catalyst for several sites to immediately begin addressing local issues before the planning phase was complete.
- **Sufficient Planning Time**—Sites found the nine months allotted for planning was sufficient to gather needed information and develop a plan. Most indicated that it was enough time to complete activities, and just enough time to keep the process moving.
- **CFAA Structure and the Balance of Flexibility and Direction**—CFAA was designed to provide planning grant sites with the most flexibility possible in designing and undertaking their planning activities. While this flexibility was useful, it also led to some lack of focus and confusion. Initiative planners should consider providing additional instruction and direction to participants. For example, sample data collection tools and specifics regarding Community Profile content could be provided to future planning sites.
- **Technical Assistance and the Balance of Flexibility and Certainty**—The approach taken to TA in the CFAA initiative—a loose set of TA provided by a specific set of people—worked well. It appears to have provided the right balance of flexibility to meet unique needs as well as consistency. However, it is also clear that sites may not have been fully aware of all the resources available to them and relied most heavily on local resources and resources that were reaching out to them. Having a local TA provider with specific substantive knowledge could provide additional assistance. The “hands-on” approach taken by ACF appears to have been helpful as sites indicated they got the clear impression that this initiative mattered to ACF because of the regular contact with staff. Most importantly, it is critical that all TA providers, as was the case in CFAA, understand all the issues faced by sites so that TA coordination can be maximized.
- **Value of Initiative-Wide Meetings**—There is almost universal agreement that the three initiative-wide meetings were an excellent opportunity to refocus on the project, learn from other sites, and promote cohesiveness among team members. These meetings should be structured to maximize these outcomes and, whenever possible, provide team members with experiences that help them complete the planning process.
- **Challenge of Including “Unusual Partners”**—Each site was challenged to bring unusual partners to the planning table—not just youth and adult services, but other kinds of community representatives as well as “unaffiliated” youth and older adults. These voices are critical to centering projects on the real needs of youth and adults as well as creating greater community engagement. Most sites found this difficult and few attempted to move these populations from data “subjects” to participants. Emphasizing the importance of this and providing assistance with effective engagement strategies is necessary.
- **Import of Cultural Context**—One key lesson of this initiative goes beyond the nuts and bolts of planning: Understanding local cultural context—influenced by language, history, population dynamics—is critical to the decisions made by local planning teams. By being sensitive and responsive to the local cultural context, sites were more successful designing data collection tools as well as understanding the real needs of the community.



## APPENDIX A: INITIATIVE TIMELINE/SCHEMATA

### Phase I – Initial Design, Application, and Awareness Building (Aug. 2002 to Dec. 2003)

- Advisory Group Planning
- Work with Nancy Henkin and Donna Butts on developing concept of CFAA
- Regional Conferences in Sept.03
- Launch Planning Grant
- RFP process
- Choose pilot sites



### Phase II – Discovery and Planning (Jan 2004 to Oct 2004)

#### **Discovery** (February-March-April-May)

Utilizing the 9 core elements of a Community of All Ages, sites will **develop and implement a community profile by examining a** range of issues to better understand how their community currently addresses the needs of all age groups. A variety of methods for gathering information about your community should be used. Areas to assess **may** include:

- ✓ Physical infrastructure (things related to the “built environment and land use issues, like housing, open space, transportation)
- ✓ Education and Lifelong Learning
- ✓ Civic Engagement
- ✓ Family Support and Caregiving
- ✓ Culture and Recreation

**Project Deliverable: The result of this information gathering period, will be the development of a CFAA Community Profile that will be submitted to ACF in October. This document could also be distributed as a resource in your community.**

#### **Creating a Vision and Developing a 3 Year Action Plan** (May-June-July-August-September)

Based on the observations and findings from the community profile, each site will develop a 3-5 Year Communities for All Ages Action Plan. Each site will prioritize specific and measurable actions to address the gaps identified in the CFAA Community profile, as well as build upon the assets. The Plan should denote specific actions that would take place over the next three to five years to implement the vision of their community of all ages with or without ACF implementation funding.

#### **Project Deliverable: Action Plan submitted to ACF in early October.**

By the end of October, ACF will invite up to 6 sites to submit an Implementation Proposal. The Proposals should denote what would be done with a three year implementation grant (ranging from \$50,000 to \$75,000 a year for each of three years), and efforts to sustain and enhance the project- both during and after the three year grant period- through some combination of local, state, and national resources.

**Phase III – Implementation**  
*(Nov. 2004 to 2007)*

Implementation Proposals will be reviewed in November and grant awards announced in December. It is expected that up to 4 sites will receive implementation grants.

**First Year (2005)**

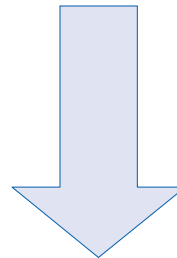
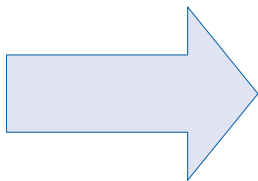
Advanced Planning and start-up of implementation activities

**Second Year (2006)**

Implementation activities fully underway and beginning to identify other sources of support for the project (local, statewide, or national)

**Third Year (2007)**

Completion of implementation projects, other funding sources secured.



**Phase IV – Continuation**  
*(Beyond 2007)*



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