



From Idea To Action
July 2004 – September 2005

A report on the evolution of a civic engagement model that is transforming a California community into a good place to age

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The Steering Committee for Contra Costa for Every Generation

As of March 2006

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Catholic Charities of the East Bay

Linda Best

Contra Costa Council

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Designs for Aging Well

Ted Feldman

Aging-friendly Advocate

Linda Fodrini-Johnson

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INTRODUCTION

Contra Costa for Every Generation (CCEG) is a growing, countywide group of volunteers (presently over 300) whose mission is “to make our local communities good places to age — supporting our aspirations to stay healthy, live independently and lead full and productive lives.”

CCEG’s founders recognized that over the next 25 years the projected doubling of Contra Costa’s aging population – those 65 and older who were born between 1946 and 1964 – has profound implications for every aspect of life in this county. They created CCEG to combine the skills and influence of “Baby Boomers” with the knowledge of current elders in a civic engagement process that will help the public sector, the business community, nonprofit organizations, and individual citizens simultaneously pursue both a long- and a short-term goal. In the long-term, these aging “Baby Boomers,” who will be healthier and live longer than any prior generation, will redefine what it means to age in Contra Costa County and beyond, from employment to volunteerism to what services are available to enhance every generation’s quality of life. More immediately, this effort will help close the gaps that currently exist in meeting the housing, transportation, health care, employment, and quality of life needs of today’s seniors.

In just its first year of operation, CCEG has begun to close those gaps by creating a unique movement that can serve as a model for communities throughout California. This document is an effort to carefully record CCEG’s early history and to identify the factors that have contributed to the effort’s success.

ROOTS AND SPONSORS

CCEG grew out of lessons learned from the Healthy Aging Initiative, a \$1 million a year funding partnership of the John Muir/Mt. Diablo Community Health Fund and the Y & H Soda Foundation. Formed in 2001, this six-year grantmaking Initiative has two goals.

The first goal is to expand and enhance the capacity of local nonprofit organizations to respond to the needs and aspirations of an increasingly aging population. A primary focus is reaching out to seniors whose access to services is limited for reasons that include: cultural and linguistic barriers, financial circumstances, and transportation challenges. After three years of grantmaking, many of the nonprofit organizations funded by the Healthy Aging Initiative have made considerable progress in connecting underserved, overlooked, and isolated seniors to an array of supportive services, as well as to social and recreational opportunities.

Nevertheless, by early in 2004 the Healthy Aging Initiative funding partners and nonprofit organizations serving seniors understood that preparing Contra Costa County for the aging of the baby boomers would require an even more ambitious effort. It was time, therefore, to focus on the second goal: encouraging and supporting collaboration between the public, private and nonprofit sectors for the purpose of engaging all of Contra Costa in preparing for this major demographic shift.

An Initial Vision:

In the same proactive way that they developed the Healthy Aging Initiative, Grace Caliendo, President and CEO of the John Muir/Mt. Diablo Community Health Fund and Judy Murphy, Executive Director and CEO of the Y & H Soda Foundation agreed, with the support of their governing boards, to launch and support CCEG through 2006. Based on their many years of experience as funders of new projects, they determined that: 1) at least three years of support would be needed, 2) over the first three years the project would need funding of at least \$500,000, 3) people from the community would have to lead the effort, and 4) a set of core values would have to guide the development and implementation of the process. To give CCEG a home base, the Community Health Fund agreed to provide office space for the first three years.

Core Values:

The values guiding this effort from the very beginning were simple, yet powerful. The process would:

- have to reflect the various age groups, genders, ethnicities, income levels, lifestyles, and geography that compose Contra Costa's population
- bring together people from the nonprofit, private and public sectors
- invite and value everyone's participation
- not be controlled by any one sector or entity
- be a unique civic engagement opportunity for each person to volunteer their time, talent and influence to identify and take action on needed changes that would make Contra Costa's communities more aging-friendly.

Developing Leadership:

In the beginning, Caliendo and Murphy brought together a few key people from public agencies, the business community, and nonprofit organizations that would be willing to lead the development of this new effort. They informally convened these community leaders to solicit their input about how to create a broader, more grassroots initiative.

Within weeks, this small group of informal advisers had become a committee that would define and organize this new effort; in doing so they would give the idea a shape and an identity. As part of that process, the group realized that they needed to actively seek broader representation: people that could bring to the effort a particular expertise or who represented key elements of various Contra Costa communities. The expanded group of about 20 came to be known as The Organizing Committee.

The formation of this group reflects the funding partnership's early recognition that leadership development would be a key challenge. They made an unusual strategic decision: rather than assigning or planning leadership roles beyond their own roles as initiators, they would let leadership grow organically at various transformation points along the way. That is, they believed committed leaders would step forward when necessary, thus making this a project of which the communities themselves would truly take ownership.

The Initiative Takes Shape:

The next step was to hold a series of meetings during the summer and fall of 2004 during which the initiative began to take shape. The group decided on its name: Contra Costa for Every Generation. They began to discuss the idea of surveying seniors directly about their needs and began meeting with representatives of community planning groups

to discuss how CCEG might effectively grow into an organization that could accomplish real community change. They laid out a broad outline for their work:

- conduct research on the current environment for older adults,
- create an “action plan,”
- act,
- and periodically assess progress.

NEXT STEPS: PUSHING THE PROCESS FORWARD

Expand the Funding Pool:

The Community Health Fund and Y & H Soda Foundation agreed to contribute \$240,000 over three years from the Healthy Aging Initiative. To obtain the other funding, the Community Health Fund submitted proposals to the largest health funders in California: The California Endowment and The California Wellness Foundation. They both responded with grants that added a total of \$128,000. From the public sector, Contra Costa County’s Employment and Human Services Department contributed \$150,000 toward the effort. By mid-2004 these commitments added up to \$518,000 to support CCEG through 2006.

Create a Critical – and Diverse – Mass:

Another thing the Organizing Committee’s initial meetings established was that it would be important to start the process with a relatively large number of individuals representing the varied constituencies in Contra Costa County. That would not only help create momentum, but also ensure that membership would reflect the county’s diversity, which as described above was – and remains – a core value. Diversity ensured that issues such as inadequate housing, transportation, and health services were not just the concerns of the poor and powerless; by making them issues of aging – something that none of us escape – they became everyone’s concern.

The next step therefore was to create a list of potential volunteers who members of the Organizing Committee would contact personally to urge participation. As CCEG grew, the group also designed a volunteer form with questions that allowed them to regularly check for participation across racial, ethnic, age, employment, and geographic boundaries.

Create A Web Site:

During these initial weeks, the Community Health Fund sponsored the creation of a web site – www.foreverygeneration.org – which eventually would win a 2005 Wilmer Shields Rich Gold Award for Excellence in Communication from the national Council on Foundations. The web site is but one example of CCEG’s attention to effective communication – a significant factor in sustaining this largely volunteer effort.

Generate Momentum and Visibility:

In October 2004 the leadership group organized a kick-off event for the entire group of 300 plus volunteers. The keynote speaker was Marc Freedman, President and Founder of San Francisco-based Civic Ventures and author of *Prime Time: How Baby Boomers Will Revolutionize Retirement and Transform America*. A frequent commentator in the national media, Freedman is the leading voice in extolling the virtues and potential that will accompany the aging of baby boomers. The event generated momentum and visibility, and jump-started the next step in the process: gathering communitywide input on issues associated with aging in Contra Costa.

THE ADVANTAGE INITIATIVE'S SURVEY OF CONTRA COSTA SENIORS

Shortly after the October event, the Organizing Committee began interviewing organizations to help them survey the county's older adults. Among those they spoke with were Phil Stafford and Mia Oberlink of The AdvantAge Initiative, a widely respected, New York-based project that has as its goal "Improving Communities for an Aging Society." The Organizing Committee chose AdvantAge to conduct a CCEG-sponsored survey of 721 adults, age 65 and older, evenly dispersed among the six regions in Contra Costa.

The scientifically valid survey took place in December 2004 and January 2005 – with subsequent analysis led by Dr. Andrew Scharlach, Kleiner Professor of Aging at the University of California and Korrie Ottenwess of the Community Research Institute in the Dorothy A. Johnson Center for Philanthropy & Nonprofit Leadership at Grand Valley State University, Michigan. It identified six areas of concern: housing, transportation, health care and wellness, neighborhood quality of life, involvement in the community, and support services. Because he is a nationally recognized expert on aging issues and has participated in similar statewide efforts, Scharlach's continued involvement has been an important factor in the group's success.

The First Countywide Summit on Aging:

The release of the survey results in a professionally written and produced report would be the focus for the next event: the first countywide summit on aging in Contra Costa, held in March 2005. The summit was a half-day program designed to engage the growing list of community leaders and "aging-friendly advocates" in the process of developing a strategic plan to guide CCEG's activities for the coming months. To assist it in planning and carrying out that event, the Organizing Committee engaged Marilyn Snider of Snider & Associates, a professional facilitator with a deep understanding of how to create a process that fosters participation, cooperation, and accountability. With Snider's facilitation, participants at the summit split into six workgroups – one for each area of concern – with representation from each of the six regions in Contra Costa. With guidance from members of the Organizing Committee, each workgroup began the process of identifying vision statements and goals for making the community more aging-friendly with regard to their particular area of concern.

The professionally written press releases helped garner positive media coverage for the survey report, most tangibly a front page story and lead editorial applauding the group's effort in the most widely circulated newspaper in the county. CCEG's positive introduction to all of Contra Costa was further confirmation of the group's attention to and belief in the value of clear and ongoing communication.

THE STRATEGIC PLAN: PATHWAYS TO AN AGING-FRIENDLY COMMUNITY

The next step was to hold day and a half long workshops, facilitated by Snider, for each of the six workgroups. During those workshops, held in April and May 2005 in locations spread throughout the county, each of the groups refined vision statements for the year 2020, and identified three-year goals and six-month strategic objectives, thus transforming the areas of concern into action-based initiatives.

Each initiative identified specific tasks that would address the six-month objectives. Task Forces under the leadership of a Task Force Chair would be responsible for completing each task. In turn, each Task Force Chair would report to a representative of the Organizing Committee, who in this setting was known as the Work Group Convener.

John Muir/Mt. Diablo Community Health Fund
Y. & H. Soda Foundation
Healthy Aging Initiative & Funding Partnership

The Healthy Aging Initiative is sponsoring and funding
Contra Costa for Every Generation from 2004 through 2006

About the Funding Partners

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The Community Health Fund, a public charity, was incorporated in 1997 and is the grantmaking arm of the not-for-profit John Muir/Mt. Diablo Health System. Its grantmaking mission is to improve the health and well-being of residents within central and east Contra Costa County, with an emphasis on uninsured, underserved and overlooked populations. Its goal is to expand access to affordable, quality healthcare, health education and wellness programs that can improve the health status of families, children and youth, seniors and other vulnerable adults.

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The Soda Foundation, a private foundation, was founded in 1964 by Y. Charles Soda and Helen C. Soda, and following the deaths of Mrs. Soda in 1983 and Mr. Soda in 1989, formalized grantmaking commenced. The Foundation funds and supports charitable and religious organizations in Alameda and Contra Costa Counties that enhance the health, education and well-being of the underserved. The Foundation seeks to enhance the quality of life for the economically disadvantaged, disabled, elderly and youth, and to promote their health and welfare; to provide opportunities for education; and to support those organizations whose religious philosophy strengthens the spiritual and temporal well-being of those they serve.