



Aging Initiative

Purpose

The Plough Foundation Aging Initiative is designed to support programs that promote aging in place (AIP) by older persons in the Memphis and Shelby County Community and/or assist in the prevention of the abuse, maltreatment and exploitation of older citizens, especially the frail elderly, as well as improving the quality and coordination of elder abuse and neglect services.

Background

In 2011, the Plough Foundation began to consider the impact of the growing number of “Baby Boomers” who were poised for retirement and the existing systems in place in Shelby County to address the needs of those currently beyond retirement and the “Silver Tsunami” yet to come. After completing more than 70 interviews of individuals and organizations with expertise in all aspects of aging, the Foundation commissioned a telephone survey of senior citizens to directly ascertain their opinions and concerns.

The AdvantAge survey, recognized for its high-quality methodology, widespread use in other American cities and success at securing responses, surveyed 551 seniors 65 and older with 57% from the City of Memphis and 43% from suburban Shelby County. The survey was weighted demographically by race, ethnicity, gender and income to ensure views articulated were representative of our community. The survey revealed much about the current state of the elderly in the community, most critically the level of poverty among older persons, the desire to age at home and the lack of knowledge of existing programs and opportunities specifically for this population. To learn more about the survey, view it at: <http://www.vnsny.org/advantage/plough.pdf>.

Coinciding with the survey and extensive in-house research on the topics of aging, two groups were convened – a task force on Aging in Place and Mobility and one on Elder Abuse and Maltreatment. These practitioners have continued to meet on a regular basis to discuss these critical topics, assess available funding and opportunities for collaboration, and to supply the Foundation with practical details about the processes and systems that are in use daily to serve older citizens of Shelby County.

Among the details provided by the task forces were the stark reality that many older persons struggle with in-home and out-of-home mobility issues. While there are various sources of funds available for minor home repair, ramp construction or installation of grab bars and other safety measures, those funds are limited, depleted quickly and serve only a fraction of those in need.

Aging in Place, however, is not limited to what is inside the walls of one’s home or the boundaries of one’s property. When an older person leaves the relative safety and comfort of their house or apartment, the livability of the community that surrounds them is critical to their well-being. Pertinent issues include:

- Are the sidewalks in good repair and accessible to wheelchairs, walkers or a senior with a cane?
- Is there access to safe, reliable and affordable transportation?
- Are amenities like grocery stores, physicians’ offices, drug stores and restaurants nearby?
- Are there opportunities for interaction with others of both the same and different generations?

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- Are the public buildings of our state and local governments fully accessible and deliberate in their design to accommodate all of our state's citizens?

In regard to abuse, it is clear that the exploitation of seniors is on the rise according to numerous sources including law enforcement agencies. Nationally, approximately 1 out of 23 cases is actually reported and those cases of physical, emotional and sexual abuse are often perpetrated by friends, family members and so-called caretakers. The largest percentage of elder maltreatment falls within the realm of financial exploitation in which many seniors lose thousands of dollars along with their dignity. Weak Tennessee laws coupled with the failure to report these crimes provide little in the way of punishment for perpetrators.

In September of 2013, Plough Foundation Executive Director, Mike Carpenter was asked by the Governor to serve as Shelby County's only representative on a statewide task force on aging. Mike's participation has benefitted the work of the Foundation through his ability to engage community and state leaders. A report from the task force is due to the Governor this month. This report focuses on three broad areas: 1) Healthy Aging; 2) Livable Communities; and, 3) Caretaker Support.

Recognizing that as a society, we are often guilty of ageism and that issues related to the elderly often are not a priority among policy makers, the Foundation believed it important to educate community leaders about the wide-ranging issues related to this growing population. In November of 2013, we launched the first Plough Foundation Speakers' Series on Aging. Aging in Place experts, Patrick Roden, PhD., a social gerontologist, and Louis Tenenbaum with the Aging in Place Institute discussed the value of seniors aging in place, how to create livable communities and the implementation of universal design. In January of 2014, the Foundation hosted a panel discussion with law enforcement, legal experts and state adult protection officials on the subject of elder maltreatment. Finally, in March of 2014, Dan Veto of the nationally-renowned Age Wave closed the speakers' series with an uplifting discussion of course corrections that can improve the lives of older persons.

To further our research and understanding of the collaboration of services in Shelby County for the aging, the Foundation commissioned the services of MH Consulting, LLC to assess the capacity of potential lead partners for AIP initiatives and to make recommendations. In brief, the report demonstrated a number of solid not-for-profit programs benefitting the poor and elderly in the area of home repair, but each program lacked capacity to manage and implement alone a countywide or other broad-based effort to promote AIP.

After two years of rigorous research, community engagement and the input of national thought leaders on the general topic of aging, it has become evident to the Foundation that two of the greatest areas of need are assistance with Aging in Place and protection from elder abuse. We believe significant changes can be made in these areas in a relatively short timeframe. To that end, we are committing substantial Foundation resources to innovative and collaborative proposals that strive to address these concerns.

The Programs

Aging in Place Proposals

Because it is fact that AIP is more cost-effective, the Plough Foundation is seeking proposals that promote opportunities for elderly Memphians to remain in their current living environments by improving the safety, mobility and functionality of those environments. Successful proposals should consider including some of the following elements:

- interior and exterior AIP assessments;
- the utilization of principles of universal design;
- leveraging of Foundation funds with public or other private monies to expand the number and types of repairs;
- features to support the role of caregivers in the home;

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- features that promote socialization of the elder person(s) in the home;
- technology for improved safety, mobility or interaction with medical professionals;
- organization and creation of systems of care for Naturally Occurring Retirement Communities (NORCs);
- evaluation or monitoring components to determine the impact of the improvements on the independent living of the affected older persons;
- collaboration with not-for-profit or governmental entities to reach a critical mass of improved structures;
- improved transportation options that are safe, reliable and cost-effective.

While the above list provides suggestions for inclusion in high-quality proposals, there are many other AIP possibilities that the Foundation would be willing to consider for funding. *Any successful proposal must take into account sustainability at the conclusion of the grant term.*

Elder Abuse, Maltreatment and Financial Exploitation

Data clearly suggests that the vast majority of elder abuse cases go unreported. Tennessee state law requires any citizen who is aware of elder abuse or maltreatment to report that abuse or be subject to prosecution. In Shelby County both financial exploitation and physical abuse are common occurrences according to law enforcement. Grantseekers proposing to address this topic should consider including some of the following elements:

- increasing the number of professionals who can identify elder abuse, assist victims of elder abuse and promote awareness of the statutory duty of citizens to report;
- training for workers at financial institutions to recognize fraud and financial exploitation and empower them to intervene;
- financial protection projects aimed to protect seniors from financial abuse (i.e. asset recovery, identification and protection from predatory lending, and the prevention of financial loss);
- best practices in investigative techniques for law enforcement, prosecutors and social workers;
- strategies for increasing appropriate temporary shelters for frail elderly who must be removed from their homes because of abuse;
- utilization of multi-disciplinary teams (MDTs) or taskforces to investigate and develop a safety plan for abused older persons or the development of generalized and specialized MDTs, such as medical response teams or Financial Abuse Specialist Teams (FAST);
- use of gerontologists, pharmacists, dentists or other experts to assist professionals in identifying elder abuse or self-inflicted maltreatment;
- projects that can provide recommendations for improving the systems in which elder abuse cases are handled within Tennessee. Specific projects might improve the reporting of elder abuse data, develop model court systems for elder abuse victims, or create training programs for staff to address facility and community complaints;
- ensuring food security for the frail or maltreated elderly;
- technical assistance projects that provide leadership development, establish a repository of resources, and foster a learning community throughout multiple agencies and projects in order to address elder maltreatment in Shelby County;
- no cost or low cost legal representation for older persons exploited or abused in any way.

This list represents suggestions that would be viewed favorably by the Foundation, but other approaches to intervention are welcomed and encouraged.

Total Awards

The Plough Foundation's Board of Trustees is prepared to award a significant number of grants expected to amount to unprecedented sums donated by the organization in the coming year. Awards will be made for high-quality proposals with the potential of having a major impact in our community in the areas of senior citizen maltreatment and abuse and aging in place. The total dollars set aside to be spent will be determined by the

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excellence of proposals received. Coinciding with these funds, the Foundation plans to set aside an additional large sum for broad-reaching, innovative proposals that serve older citizens, but are potentially outside the scope of aging in place and elder maltreatment.

Eligibility Criteria

To be eligible for a Plough Foundation Aging Initiative Grant an organization must:

- Be a 501(c)3 tax exempt entity as defined by the Internal Revenue Service or a local or state governmental entity;
- Submit a proposal that exclusively serves Shelby County residents;
- Have a demonstrated track record in working with older populations.

Proposals that will not be funded

While proposals must address AIP or Elder Abuse, certain types of requests are not funded by the Foundation.

These include:

- Projects outside the Memphis/Shelby County area
- Individuals
- Lobbying activities or advocacy campaigns
- Annual fund-raising events, e.g dinners, galas, and tournaments
- Conferences and seminars
- "Crisis management" situations caused by poor planning or poor execution
- Private schools K-12
- Debt retirement

Selection Criteria

Submitted proposals will be reviewed based on a variety of factors. The financial stability and history of service delivery of the organization applying will be a primary focus. Additionally, the relevance of the proposal to the selected focus areas, the viability and sustainability of the request, the perceived impact on the target population and efforts at collaboration will all be considered.

How to Apply

All proposals must be submitted online through the Plough Foundation website at www.plough.org. To submit initially is a two-step process. First, the applicant will visit the website, create a user name and password and submit a brief letter outlining the proposed initiative. Letters of interest should clearly note at the top of the page that it is in response to the Aging Initiative. The Foundation Aging Initiative Committee will review the letter and **may** invite the applicant to submit a full application to the Foundation. If invitation is made to submit a full application, the applicant will log onto the website where access to the complete application will have been granted. A full application will require submittal of two years of financial statements and the organization's most recent audit. If an organization is new and lacks this financial information, a determination may be made to waive part, or all, of this requirement.

Once the initial two-step process is completed, the application will undergo a rigorous review. The applicants may be invited to interview to answer questions. Following a successful interview, the applicant will be notified by the Executive Director whether or not the grant has been awarded, declined or if further review is necessary.

Monitoring

Successful proposers will be required to sign a grant agreement. Within that agreement performance measures will be articulated and the grantee will be required to demonstrate progress towards reaching those measures via periodic progress reports to the Foundation. In addition, proposals submitted to the Foundation will articulate

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how the organization intends to monitor the program and what performance measures will be evaluated. Successful applicants may be asked to present an overview, findings or results of the funded project at a meeting or meetings of the Executive staff.

The Plough Foundation may, at its cost and discretion, employ the services of an outside evaluator to assess the progress during the term of the grant to ensure that the objectives are being met and that the Foundation is receiving the maximum return on investment.

Responsible Foundation Staff

For questions regarding this call for proposals, please contact:

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Key Dates & Deadlines

June 15, 2014 – *Letters of Interest Due (no later than 5:00 pm Central Daylight Time)*

Deadlines for submission of full applications, interviews and final decisions will be determined on a case-by-case basis depending on the type and complexity of the proposal submitted. It is the intention of the Foundation to make all awards related to this call for proposal no later than **June 15, 2015**.

Proposals should be addressed to:

Barbara Jacobs, Program Director
Plough Foundation
62 North Main Street, Suite 201
Memphis, TN 38103

About the Plough Foundation

“You do the greatest good, when you help the greatest number of people.” – Abe Plough. Simple, yet profound -- these words summarize the mission of the Plough Foundation. The leadership of the Plough Foundation knows there are many pressing social and economic needs in our community. We strive to meet those needs in an impactful and sustainable way for the good of the Memphis and Shelby County community. The Foundation has existed for almost 50 years and funds a wide-variety of programs, facilities and needs throughout the Shelby County Community. The Foundation is currently led by Diane Rudner, Chair of the Board Trustees and granddaughter of Mr. Plough.