A PAPER FROM GENERATIONS UNITED AND THE EISNER FOUNDATION

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PIECING IT TOGETHER:

WHAT WE KNOW ABOUT THE FUNDING PUZZLE FOR SPACES THAT CONNECT YOUNG AND OLD

THE EISNER FOUNDATION

generations united

Because we're stronger together®

Introduction

"Intergenerational programs are easy to like. The harder part is the weaving together of resources and the demolition of silos and age-segregated mindsets required to get these projects done. But they're worth it."

—Mark Dunham, principal, Novum Strategies

Intergenerational shared sites—places and spaces that serve and together engage younger and older people—are the type of care facility most Americans say they want for their loved ones and themselves. Yet only about one in four know of a site in their community.[1] Why are there so few when interest is so high?

Building upon 20 years of leading the shared site field (and more than 30 years of supporting quality intergenerational programs and policies) Generations United tackled this question with the support of The Eisner Foundation. Working with Dr. Shannon Jarrott at The Ohio State University on a national survey of shared site practitioners, we found funding and financing shared sites as one of the top barriers cited. Whether trying to sustain an existing program or in the planning phase for a new site, the complexity of potential funding sources—and not knowing where to begin—become daunting barriers.

This paper aims to share what we currently know about funding and financing intergenerational shared sites, their potential cost-savings, and recommendations to guide our work and that of the field to pave the way to increase shared site development around the country.

As a beginning point, we gathered information from our most recent signature reports created in partnership with The Eisner Foundation. We also included a more in-depth analysis of the data on cost and funding sources from the 2018 national survey conducted by Dr. Jarrott and information from interviews with program providers.

Photo courtesy of Stuart Kandell

The Funding Puzzle

"I often say Bridge Meadows is at the intersection of child welfare, housing, aging, and health. Our goal was to create a three-generation community—children, parents and elders—with the social purpose of helping children from foster care find forever families. The biggest challenge is that funding for services is siloed."

—Derenda Schubert, executive director, Bridge Meadows, Portland, Oregon[2]

Generally, intergenerational shared sites have multiple funding streams targeting one age group or one need. Funding streams often are siloed and restrictive; rarely are they intertwined. In fact, 46 percent of shared sites rely on a single funding source (e.g. youth program or older adult program or grants).[3] Proponents of these sites must be creative and tenacious as they work to piece their funding puzzle together. It may require becoming adept at coordinating grant writing, managing capital campaigns, and navigating myriad funding streams and reporting systems some of which may be familiar, others which may not be.

For example, ONEgeneration an intergenerational shared site in Van Nuys, California receives state and federal funds for some of the adult day services. Their child care, which is a National Association for the Education of Young Children accredited program, always has a waiting list, and is a fee-for-service program that can help offset costs from their other programs.[4]

The following are some funding sources often cited by shared site champions:

Typical funding sources for older adult program components such as a nursing facility, older adult housing, or adult day services may receive funding from Medicaid and Medicaid waivers; Medicare; a wide range of city, county and state funding for aging services; mental health funding; Veterans Affairs funding; loans or grants; private pay from residents; long term care insurance and managed care insurance; HUD loans, commercial bank loans and private investor funds; and tax credits.[5]

Typical funding for children and youth-oriented programs such as a childcare or early childhood education program may include funds from Head Start, state or federal funds for early childhood education, school district or community education funds, or private pay.[6]

General funding that does not specify a targeted generation can come from city or county sources, community redevelopment funds, United Way, Neighborworks, national or local foundations, corporate grants, and private donors including legacy and naming gifts. Thirty percent of shared site programs have grants as a funding source. If building a site, tax credits, commercial loans or loans from the state may be involved.[7]

Shared sites also support program costs through creative fundraising like the weekly ONEgeneration Encino Farmers Market in California where donations and a portion of the proceeds each week supports the programs and services ONEgeneration provides older adults and youth. St. Ann Center for Intergenerational Care in Milwaukee, Wisconsin operates stores on each of their campuses, holds annual events like the Chili and Jewelry Sale, and offers rental space to the community for events.

Sites also report benefitting from donated property and long-term, low-cost leases. Mount Kisco Child Care Center in Mount Kisco, New York, was built on over 2 acres of land that was donated for their expansion to co-locate with My Second Home, an adult day services program.[8] Easterseals Harry and Jeannette Weinberg Inter-Generational Center in Silver Spring, Maryland was built on land donated by the county government. In return, Easterseals repaid the value of the land ($1,900,000) in access to scholarships to county residents for their services.[9] Grace Living Center in Jenks, Oklahoma leases space to Jenks Public Schools for $1 a year for their onsite Pre-K and Kindergarten classes.

Issue-specific funding can address a wide variety of components. For example, it took the Los Angeles LGBT Center ten years and a $57 million capital campaign to build their Anita May Rosenstein campus. The city of Los Angeles' funding to address the severe homelessness crisis became a large block of their funding. In Hawaii, Seagull Schools benefitted from the Kapuna Caregivers Act,[10] which supports working caregivers by providing up to $70 per day to pay for care for their family members, like the adult day services Seagull offers along with childcare.[11] During summer months in Columbus, Ohio, lunchtime at the Elim Manor Community — an affordable housing community for older adults — becomes an intergenerational space. By partnering with the Columbus Recreation and Parks Department on their Go, Lunch! Program, part of the USDA's Summer Food Service Program providing free meals to children under 18, the community offers daily meals with crafts and games and a space to hang out.[12]

Innovation funding allows for more flexibility and creative approaches, such as the Citi Foundation's 'Citi Progress Makers' grant, which allowed the Los Angeles LGBT Center to try different program models. When the City of Columbus was awarded a Choice Neighborhoods Implementation Grant from HUD, the purpose of which was to transform troubled neighborhoods into neighborhoods of choice, the Champion Intergenerational Center was created. The Center also served as a catalyst for discussing the redevelopment possibilities in the neighborhood, and residents were excited about a place in their neighborhood where young children could learn from and spend time with older adults.[13]

Intergenerational specific funding can be available, although it is typically geographically focused. The Eisner Foundation — the only US foundation investing exclusively in programs that connect generations for the enrichment of communities — supports intergenerational initiatives in Los Angeles, California. Recently, the St. David's Foundation in Austin, Texas launched a new intergenerational funding initiative in Central Texas. The Helen Andrus Benedict Foundation supported intergenerational shared sites in Westchester County, New York including Andrus on Hudson. The Corporation for National and Community Service included an intergenerational funding priority in their 2020 Senior Corps RSVP competition to address ways to increase older adult engagement with young people in the areas of school readiness and K-12 success.

Photo courtesy of Karen Peterson

Costs and Cost Savings

While we hear anecdotally that shared site programs save money by sharing staff, space, and other operational costs, only two reports on the cost savings of shared sites could be found. A 1995 report on the U.S. Department of Health and Human Services' shared site programs indicated that the use of shared facilities can result in a decrease in total expenditures for such items as equipment, administrative costs and overhead, but still evidence that these programs actually save money did not exist.[14]

A preliminary study commissioned by Generations United in 2008 titled *Saving Dollars While Making Sense* found that program costs are less when older adult, youth and child services share expenses. The study found personnel costs were significantly less in intergenerational shared site care facilities. This finding is even more profound given personnel costs often make up more than 30 percent of the program's budget and is contrary to the belief that these programs will require additional staff.[15]

The study also found that the sites often experienced cost savings in rent. They were able to meet the square footage requirements for licensure with fewer feet which meant less money going towards rent. Given the large dollar amount some programs pay for rent, sometimes up to half a program's budget, this finding could have serious implications. The findings indicate that the more integrated the intergenerational programming, the more likely they are to experience cost savings. Rather than simply sharing space, sharing expenses lowered the program costs.[16]

This current exploration dug deeper in the findings from the 2018 national survey and interviews with shared site practitioners to look at the costs and potential cost savings of offering intergenerational shared sites.

Mission plays a key role in how organizations describe the financial cost of offering intergenerational programming. In many cases, expenses may simply be the costs of offering the elder and youth services. For organizations whose mission is to provide youth and elder services, the associated expenses are not "extra" but part of their mission. For organizations whose mission is to provide residential elder care, childcare services are viewed as an additional expense because they are not part of the organizational mission.

Photo courtesy of Lani Faith

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Additional expenses are a reality for many shared sites. Of 207 intergenerational organizations (both shared site and non-shared site) who responded to national survey, 82 percent indicate that offering intergenerational programming generates additional expenses.[17] Additional expenses could be personnel, rent, maintenance, equipment, materials and supplies, training, insurance, administrative costs, overhead and others. The source of additional expense may likely come from personnel costs. One-third of those reporting additional costs rely on an intergenerational coordinator to deliver programming, often in partnership with regular care staff and volunteers.[18] When programming is coordinated by regular staff, ratio requirements at some types of care programs may necessitate additional staffing to maintain required ratios of staff to client for all ages. Sharing space can eliminate often costly transportation expenses many intergenerational programs incur to bring the generations together.

Solutions to covering expenses vary. Many sites describe how programming expenses could be covered by the elder services budget or youth services budget. Whether one organization operates both youth and elder services or different organizations do, examples of costs and savings can be found. Forty-five percent report that youth and older adult programs share expenses.[19]

Strategic financial planning at shared site programs can help facilities build their sustainability and offset financial setbacks in one program with the revenue generated by the other program.[20] A residential care program might outsource child care to another provider, which could free up funds. There can, however, be drawbacks. One site we interviewed that contracted with a national child care provider chain described increasing franchise fees without parallel increases in state grants and subsidies to offset the increased expenses. Fundraising from an umbrella organization can help to offset expenses. For example, the non-profit group Under One Roof in Norwalk, Connecticut engages in fundraising to subsidize expenses that exceed grants and fees at the Marvin, a provider of preschool and affordable senior housing.

Even if an intergenerational program does not generate expenses, organizations incur **opportunity costs** when they choose to offer it over alternative programs and services. When asked if youth and older adults were missing out on other opportunities by participating in intergenerational programs, all providers responded “No.” One respondent replied, “Offering intergenerational doesn’t keep us from doing anything.” Some organizations find that intergenerational simply becomes *how* they engage participants in varied program options.

In some instances, co-location of youth and elder services can result because of a change in service needs. Declining demand for residential nursing care in one community freed up space to open a kindergarten classroom. While the kindergarten classroom does not generate revenue for the nursing home, the nursing home is not losing revenue from having turned the space over to the school system. Staff describe the program as an opportunity gained.

Economic Advantages

Shared sites can provide extra incentive for **staff recruitment and retention** and show promise for alleviating expenses related to turnover. For some, the intergenerational approach is what attracts them. "I had worked in adult day services before, but I came to work here because of the intergenerational approach," said Ginny Cullen, director of adult services at Mount Olivet Day Services, a shared site offering child care and adult day services in Minneapolis, Minnesota.[21] Some sites offer discounted, onsite elder care and/or child care to employees. Ebenezer Ridges in Minnesota began offering child care as a **staff benefit** but quickly saw the positive impact the children had on the residents. Today 60 percent of their child care program are employee's children, and their child care staff turnover rate is less than 5 percent, compared to typical turnover rates of around 30 percent.[22]

Shared sites often report **staff retention** numbers higher than industry standards. Monte Coffman, executive director of Windsor Place in Coffeyville, Kansas reported the staff turnover rate at his skilled nursing home, which houses a kindergarten classroom, has averaged 26 percent compared to the industry average of 65 to 85 percent. Other intergenerational shared sites report similar rates.[23]

The idea of the Champion Intergenerational Enrichment and Education Center in Columbus, Ohio, emerged from an all-staff survey asking employees of The Ohio State University about their life concerns as related to continuing to function in their jobs. Caring for aging parents and children at home was a top issue. Linda Mauger, then director of the OSU College of Medicine Office of Geriatrics proposed the idea of a shared site with adult day services and child care to better **support employees**.[24]

Shared sites report that the intergenerational component also helps with **marketing**. They have seen cost savings in areas such as advertising, programming, and staff development. For example, rather than run separate ads for youth and elder services, an ad with information about both programs can be run and the expense shared.

"Remember that the intergenerational program is an added value to the services provided to the children as well as the adults and could be part of the marketing strategy."

— Angela Aracena, vice president of adult day services, Easterseals of South Florida[25]

Shared sites also report **higher demand** than capacity for their services. Benevilla, which offers child care and adult day services on the campus of their headquarters in Surprise, Arizona reports that their child care runs at about 95 percent occupancy rate.[26] After the first year of operation, Grace Living Center and Jenks West Elementary in Jenks, Oklahoma had a waiting list for Pre-K and Kindergarten classes. As Suzanne Lair, the school principal and supervisor of the intergenerational program shared, "There would be a community uprising if we tried to close."

Photo courtesy of Hebrew Senior Life/Rashi School

Photo courtesy of Champion Intergenerational Enrichment and Education Center

Making the Case

Shared sites tell us one of their greatest challenges is convincing potential funders that their programs are effective and cost efficient. They struggle to find data that demonstrates the impacts on participants, improvement to service delivery, and marketing and occupancy advantages. Joe Mahoney, senior manager of real estate development with The Opus Group in Minnetonka, Minnesota—a company that develops commercial real estate and is planning their first shared site—says the notion of the intergenerational shared site is very interesting to all involved in the project, including potential capital partners. "The idea of an intergenerational shared site is a very compelling concept from a community perspective," said Mahoney. "And having the facts…will further strengthen that support."[27]

To collect more data on intergenerational shared sites and facilitate program evaluation, Generations United, with support from The Eisner Foundation, partnered with Dr. Shannon Jarrott of The Ohio State University to develop the **Intergenerational Evaluation Toolkit**.

The Toolkit includes the following three resources designed to meet the needs of program providers and researchers committed to demonstrating the impact of intergenerational programming:

- The Intergenerational Practice Evaluation Tool designed to be easily, quickly, and reliably completed by program staff to assess intergenerational activities and support evidence-based practices,
- An 8-step guide on Planning an Intergenerational Evaluation designed to help practitioners get started in planning and conducting program evaluation, and
- Tools for Outcome Measurement, a curated list of reliable, valid measures that have been used to demonstrate the impact of intergenerational programs with detailed information on five effective tools.

This toolkit can help advocates make the case to funders and stakeholders to improve, expand, and sustain intergenerational opportunities in their community. It is available for free at **www.gu.org**.

"Intergenerational shared sites are no-brainers that we have made too complicated to easily replicate in communities around the country."

—Donna Butts, executive director, Generations United

RECOMMENDATIONS

Provide the Support: Funding and Resources

- Educate funders on the benefits of intergenerational programs and serving multiple generations under one roof.
- Encourage government agencies, contractors, and grantees to offer replication and demonstration grants to encourage intergenerational shared sites.
- Adapt funding streams to support opportunities for co-location of older adult programs in school and youth settings.
- Increase availability of tax credits to build multigenerational co-located affordable housing.
- Encourage HUD to provide capital and service dollars to support multigenerational supportive housing and intergenerational models.
- Promote federal government involvement in intergenerational shared site education by including information about these programs in regional trainings; funding the growth and maintenance of a database; and including specific language in Requests for Proposals.
- Explore and develop new funding options, including fee for service, expanded government reimbursements, corporate credits, private insurance, and community foundation funding for local intergenerational initiatives.

Explore the Costs: Research and Data Collection

- Investigate the costs of operating common shared site models compared to the cost of those same services provided independently. With chains providing services at shared and non-shared site programs in the same community, cost comparisons (e.g., cost per participant) would be possible.
- Collect data indicating demand, such as occupancy rates and waiting lists.
- Compare data indicating satisfaction with the intergenerational model, such as client and personnel tenure, across shared site and stand-alone models.
- Collect longitudinal data on the cost-benefit of services provided at an intergenerational shared site. For example, compare school readiness indicators for preschoolers who did and did not attend a shared site program. If children who attended preschool at a shared site demonstrate greater school readiness, this benefit may be equated with cost savings resulting from lower need for subsequent tutoring or other supportive services.
- Calculate the cost of offering intergenerational programming as a therapy for people with an identified need on a per session basis and compare to other therapies that could be offered as alternatives.
- Collect impact data using standard measures of outcomes important to youth and elder service providers. Some of these measures, such as indicators of depression and self-efficacy, can be found in the Intergenerational Evaluation Toolkit. Guidance on finding other indicators, such as physical health and markers of academic and therapeutic progress, is also included in the Toolkit.
- Establish partnerships between developers, practitioners and researchers from a variety of backgrounds and experiences to unlock the puzzle of the financial costs and benefits of shared site intergenerational programs.

Conclusion

"It's critical we begin to see greater creativity and flexibility from city, county, and regional funding contracts. Funders have the incredible opportunity to encourage and support more creative intergenerational approaches."

—Emily Merritt, director, intergenerational initiatives, Alliance for Strong Families and Communities[28]

Spaces and places that connect generations are impactful and economical ways to use resources and dollars. Yet calculating the costs of providing intergenerational shared site programs is complicated. There is much diversity in the models of services offered, clients served, and the funding and staffing needed to provide quality intergenerational programs. Still, "what will it cost to offer intergenerational programming?" is a logical first question that most organizations ask when exploring co-location opportunities. While intergenerational contact can add value to a single-generation program, administrators must meet their budgets, and intergenerational programs could possibly be cut if they are perceived as costing more money than operating without intergenerational programming.

Intergenerational shared sites have tremendous investment potential. They allow a funder to invest in more than one population, meet important community needs, and better use limited resources. Funders for these programs need to be carefully cultivated in order to be successful.

Shared site leaders around the country are doing phenomenal work piecing together funding to make these programs happen. But it shouldn't be this hard. Funding limitations can discourage and limit intergenerational solutions. "Because of the way that housing is funded in Los Angeles," said Kristin Flickinger of the Los Angeles LGBT Center, "We chose to have two separate housing components that are connected through our campus instead of intergenerational, shared housing."[29] We need to smash funding silos and lessen restrictions that make intergenerational shared sites an exception and not the norm. We need to make it easier, not harder to bring the generations together.

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About Generations United

The mission of Generations United is to improve the lives of children, youth and older adults through intergenerational collaboration, public policies and programs for the enduring benefit of all. For over three decades, Generations United has catalyzed cooperation and collaboration among generations, evoking the vibrancy, energy and sheer productivity that result when people of all ages come together. We believe that we can only be successful in the face of our complex future if age diversity is regarded as a national asset and fully leveraged. To learn more about Generations United, please visit **www.gu.org**.

About The Eisner Foundation

The Eisner Foundation identifies, advocates for and invests in high-quality and innovative programs that unite multiple generations for the betterment of our communities. The Eisner Foundation was started in 1996 by Michael D. Eisner, then Chairman and CEO of The Walt Disney Company and his wife, Jane, to focus their family's philanthropic activities. The Eisner Foundation gives an estimated $7 million per year to nonprofit organizations based in Los Angeles County. In 2015, The Eisner Foundation became the only U.S. funder investing exclusively in intergenerational solutions. To learn more about The Eisner Foundation, please visit **www.eisnerfoundation.org**.

For further information, please contact:
Generations United
Phone: (202) 289-3979
Email: **gu@gu.org**
www.gu.org

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