

North Penn United Way

2012-15 INVESTMENT PLAN

**OLDER ADULTS ARE AS INDEPENDENT AND
COMMUNITY-CONNECTED AS POSSIBLE**



Co-Chairs, Community Investment Team:
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February 2012

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North Penn United Way (NPUW) is pleased to announce its 2012-15 plan for investing dollars and leadership to help more North Penn and Indian Valley older adults remain as independent and community-connected as possible.

INTRODUCTION: A NEW INVESTMENT PLAN AND PROCESS

This document is part of a comprehensive plan to ensure United Way dollars, leadership, and partnerships make the greatest and most lasting difference in the lives and neighborhoods of North Penn and Indian Valley residents who face the greatest barriers to self-sufficiency and well-being.

- A. We have sharpened our focus to **3 Community Goals** to anchor all investments:
- Students Succeed in School
 - Older Adults are as Independent and Community-Connected as Possible
 - Residents have a Strong Safety Net
- B. We will make three-year investments in a **strategic mix of programs and initiatives** aligned with these Goals.
- C. We are committed to **Results-Based Accountability*** (RBA):
- Assessing the performance of all NPUW program and initiative investments in changing customer lives and thus contributing to the Community Goal
 - Tracking measurable indicators at the overall population level for each Community Goal (where change will require community-wide investments and efforts beyond those of NPUW and its partners).
- D. Program awards will thus reflect applicant proposals that best demonstrate the following **investment criteria**:
- Alignment with one of our 3 Community Goals
 - Alignment with targeted customers, strategies, and North Penn/Indian Valley locations presented in the Investment Plan for each Goal
 - Proposed programs that are evidence-based and/or considered “best practice” models
 - Solid process of measuring service quantity, quality and customer results (*Student and Older Adults goals*); service quantity, quality, and customer satisfaction (*Safety Net goal*)
 - Demonstrated capacity to yield positive customer results and/or satisfaction.
- E. The **investment process** will also have the following changes:
- Additional agencies will be eligible to apply for program funding (all those successfully completing the NPUW “Qualification Standards” process), and
 - Awards will be based on competitive scoring per the aforementioned investment criteria, with no pre-determined or historically-based amounts to be considered for any program or agency.


* RBA is a framework authored by Mark Friedman and presented in his book *Trying Hard is Not Good Enough: How to Produce Measurable Improvements for Customers and Communities*. See page 5 for website and pages 9-10 for United Way testimonials.

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DEVELOPMENT OF THIS RESULTS-BASED ACCOUNTABILITY INVESTMENT PLAN

1. Beginning with our *ultimate goal*, “All North Penn and Indian Valley older adults will be as independent and community connected as possible (particularly those low-income residents who are 65 and older),” we selected...
2. *Measurable indicators* for tracking whether progress is being made over time towards this goal:
 - % Older adults 65+ live above the poverty line/Financial Self-Sufficiency Standard (FSSS)
 - % Older adults 65+ report having what they need to engage in activities of daily living
 - % Older adults remain safely at home with dignity, choice, and independence
3. We secured local data (economic and social) about older adults, especially our target population of low-income residents 65+, to begin developing a *baseline for each indicator*. See page 7.
4. We explored “*what works*” - what would make the biggest difference in having more older adults 65+ living as independently and community-connected as possible, by
 - conferring with numerous “community impact” United Ways across the country about how they are targeting resources to help older adults (*including Rochester, NY; Lehigh Valley, PA; and Nashville, TN*).
 - researching program strategies that have the most evidence-based support, including key areas like outreach, transportation options, home-based supports, and multi-resource centers.
5. To help determine “What would be the *best way for NPUW to invest dollars* in programs/services and special initiatives?” and “What would be the *best way for NPUW to provide leadership* to achieve the most positive results?”...
 - We learned more about the needs of older adults by supporting and participating in the 2006 BoomerANG Project, the 2006 Montgomery County Needs Assessment, and the 2010 Community Summit “Meeting the Challenges of Elder Caregiving.”
 - We invited the larger community to give input to these questions during Older Adult Strategy Sessions on November 10 and 30, 2011. See page 8 for roster of 32 participants.
6. This process has produced the *NPUW Investment Plan* presented on the following page. This plan targets older adults living in the North Penn and Indian Valley with a *priority target population* being low income residents who are 65 and older.

Community Goal: Older Adults are as Independent and Community-Connected as Possible

 <p>United Way North Penn United Way</p>	<p>Older Adults 65+ Live Above the Poverty Line/ Financial Self-Sufficiency Standard</p> <ul style="list-style-type: none"> • Outreach efforts to screen and connect low income older adults 65+ to all monetary benefits for which they are eligible • Outreach efforts to connect low income older adults 65+ with the most affordable housing, utilities, other basic needs • Access to and enrollment in health insurance 	<p>Older Adults 65+ Report Having What They Need to Engage in Activities of Daily Living</p> <ul style="list-style-type: none"> • Outreach efforts to identify and connect older adults 65+ to services and activities that support independent living and social interaction • <i>In-home services</i> (staff or volunteer): meals, chores, medical screenings, fall prevention, behavioral/skill coaching, regular check-ins, more • <i>Center-based supports</i> (senior centers and/or adult day services) that provide socialization, medical screenings, physical activity/wellness programming, more • Other <i>community-based supports</i> that provide socialization, physical activity, and more • Access to and participation in regular health/mental health screenings and care • Services that maintain safety of homes/adjustments for physical impairments • Transportation options, including door-through-door paratransit trips not covered by public carriers • Programs that promote senior volunteerism (intergenerational and other) 	<p>Older Adults 65+ Remain in Their Homes with Safety, Independence, & Connection</p>
<p>Target PROGRAM Strategies for NPUW investment</p> <p>Priority Target Population: Low-Income Residents 65+</p>	<ul style="list-style-type: none"> • Convene funders, service providers, practitioners, and other stakeholders to share, promote, and coordinate best practices • Support statewide efforts to ensure low-income older adults (65+) receive the benefits they deserve 		
<p>Priority SYSTEMS Strategies for NPUW investment</p> <p>KEY PERFORMANCE MEASURES for Programs & Initiatives (Results-Based Accountability)</p>	<ul style="list-style-type: none"> ✓ Older adult (65+) reports no/fewer ADL's (Activities of Daily Living) difficulties ✓ Older adult (65+) reports no/fewer IADL's (Instrumental Activities of Daily Living) difficulties ✓ Older adult (65+) demonstrates ability to maintain food/nutrition security ✓ Older adult (65+) meets acceptable levels in each of the six dimensions of quality of life (<i>National Wellness Institute</i>) ✓ Older adult (65+) reports decreased feelings of isolation and/or depression ✓ Low-income older adult (65+) is able to remain above the Poverty Line/FSSS ✓ Older adult (65+) experiences an increased number of preventative medical/mental health screens ✓ Older adult (65+) experiences falls at a rate below the national average (fall prevention) ✓ Caregivers report a reduction of stress or feelings of being burdened by caregiving 		

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IMPLEMENTATION OF THE PLAN: NORTH PENN UNITED WAY ROLES

- Invest in the most promising and aligned PROGRAM strategies via a “Request for Proposals” process.
- Promote communication and coordination among funded PROGRAMS.
- Strengthen NPUW collaboration with older adult service providers to explore one or more SYSTEMS strategies in which NPUW might invest and/or lead in partnership with one or more additional community partners.
- Explore the most compelling ways that Volunteer Connections (the NPUW volunteer center) might support both PROGRAM and SYSTEMS strategies, including goal-focused engagement of faith communities, college students, and local businesses. Give special attention to how older adults themselves might gain meaningful pursuits and increased social connections through volunteerism (assisting other older adults or children and teens).
- Increase community awareness efforts related to the needs of older adults (65+), especially those whose challenges related to aging are multiplied by poverty/low-income.

REFERENCED RESOURCES and LITERATURE

Results Based Accountability @ www.resultsaccountability.com.

Local Assessments

- BoomerANG Project, Montgomery County, PA, January 2006 Final Report
- Elder Economic Security Initiative Program (EESI): Elder Economic Security Standard Index for PA and Montgomery County, 2007
- Public Health Management Corporation (PHMC): 2010 Household Health Survey
- Montgomery County Office of Aging and Adult Services: 2008-2012 Four Year Plan

Adult Day Services

- Hartle, M. and Jensen, L., “Planning and Creating Successful Adult Day Services and Other Home and Community-Based Services”. NADSA-AAHSA Whitepaper.
- Mature Market Institute, “The Metlife National Study of Adult Day Services: Providing Support to Individuals and Their Family Caregivers”, October 2010.
<http://www.metlife.com/assets/cao/mmi/publications/essentials/mmi-essentials-adult-day-services.pdf>.

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REFERENCED RESOURCES and LITERATURE (continued)

Convening Older Adults to Help Solve Community-Based Issues

- National Council on Aging's Wisdom Works webpage. <http://www.ncoa.org/national-institute-of-senior-centers/nisc-news/training-helps-senior-centers.html>.

Fall Prevention

- Center for Disease Control, "Injury Prevention & Control: Home and Recreational Safety: Falls Older Adults), 2010 @ <http://www.cdc.gov/homeandrecreationalafety/falls/index.html> .
- The National Council on Aging's Fall Prevention webpage @ <http://www.ncoa.org/improve-health/falls-prevention/>.

Intergenerational Programming

- American Association of Retired Persons (AARP), Intergenerational Projects Idea Book, Washington, D.C., 1993.
- Epstein, A. S., & Boisvert, C., "Let's Do Something Together: Identifying the Effective Components of Intergenerational Programs," Journal of Intergenerational Relationships, 4(3), 87-109, 2006.

Person-Centered Care Model

- Gabel, M., "When Culture Change Meets Home and Community Based Services," FutureAge. January/February 2009 @ <http://www.aahsa.org/WorkArea/DownloadAsset.aspx?id=6736> .

Senior Center Resources

- Florida Department of Elder Affairs, "Senior Center Evaluation Toolkit," January 2010 @ <http://elderaffairs.state.fl.us/english/seniorcenter/toolkit.pdf> .
- Florida Department of Elder Affairs, "Best Practice's in Florida's Senior Centers," March 2006 @ <http://elderaffairs.state.fl.us/english/seniorcenter/BestPractices.pdf> .

Transportation

- Beverly Foundation website @ <http://beverlyfoundation.org/library/index.html> .
- National Center on Senior Transportation, "Choices for Mobility Options: Transportation Options for Older Adults" @ http://www.eldercare.gov/ELDERCARE.NET/Public/Resources/Brochures/docs/Trans_Options_Panels.pdf .
- Transportation Research Board, TCRP Report 119: "Improving ADA Complementary Paratransit Demand Estimation," 2007 @ http://onlinepubs.trb.org/onlinepubs/tcrp/tcrp_rpt_119.pdf .

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SNAPSHOT OF LOCAL DATA RELATED TO THIS GOAL

- Pennsylvania is ***ranked fourth among all states*** for the percentage of residents who are 65 and older. (<http://2010.census.gov/2010census/popmap/>) By 2020, Pennsylvania is projected to have more residents aged 65 and older than those under age 15. (www.wowonline.org/ourprograms/eesi/eess.asp)
- Montgomery County has the ***largest percentage of residents who are 65 and older*** among all Pennsylvania counties, while also being the ***third most expensive county in which to live***. (<http://www.rural.palegislature.us/clr2000.pdf>) From 2000 to 2015, the number of residents aged 60-65 is projected to increase by 57%. ([http://www.pcacares.org/Files/2015 report.pdf](http://www.pcacares.org/Files/2015%20report.pdf))
- The North Penn Area has the ***greatest density of residents who are 65 and older*** in Montgomery County. (<http://2010.census.gov/2010census/popmap/>) The number of North Penn ***residents aged 85 and older*** increased by 44% between 1990 and 2000. (Census 2000)
- Twenty-two percent (22%) – almost 1200 North Penn area older adults (65+) living below 200% of the poverty level – have ***one or more limitations*** with ***Activities of Daily Living***. (Includes eating, dressing, walking, getting out of bed). (2010 Household Health Survey, Community Health Data Base, Public Health Management Corp.)
- Thirty-nine percent (39%) – over 2000 North Penn area older adults (65+) living below 200% of the poverty level – have ***one or more limitations*** with ***Instrumental Activities of Daily Living*** (Includes shopping, preparing own meals, taking medications). (2010 Household Health Survey, Community Health Data Base, Public Health Management Corp.)
- Forty-four percent (44%) – over 2300 North Penn area older adults (65+) living below 200% of the poverty level – ***do not actively participate*** in any community group. (2010 Household Health Survey, Community Health Data Base, Public Health Management Corp.)

*Note: Nationwide, thirty-five percent (35%) of older adults have incomes under 200% of the 2007 Federal Poverty Guideline (<http://www.wowonline.org/ourprograms/eesi/>). “**Poverty level**” was defined by the US Department of Health and Human Services in 2007 as \$10,210 for a single person and \$13,690 for couples, regardless of location within the United States. A far more realistic view of poverty is presented by the ***Elder Economic Security Standard Index (EESS)***, an annual income deemed necessary for a basic and decent level of living in specific areas. For 2007 in Montgomery County, the EESS for a single adult in Montgomery County (with a mortgage) was \$30,921 and \$40,767 for a couple; \$23,386 for a single renter and \$33,232 for a couple renting. (www.wowonline.org/ourprograms/eesi/eess.asp)*



Results Based Accountability Testimonials from Local United Ways

Results-Based Accountability (RBA), as defined in the book, “Trying Hard is Not Good Enough,” is a framework for producing measurable improvements for customers and communities. A growing number of United Ways and other funders across the country are using RBA to achieve community improvements in education, income and health. Below are comments from some of the United Ways that are leading the way:

“RBA is such a clear and easily understood method for identifying the change we want to see in our communities and then for making a realistic plan to achieve that change. We have used RBA with our community partners to successfully reduce binge drinking among teens and young adults and to reduce childhood obesity in our county. The precision and discipline of RBA has made us favorably competitive for national foundation and government grants. I highly recommend RBA to United Ways.”

**Mary Lou Goeke, Executive Director
United Way of Santa Cruz County (CA)**

“The goal of all of our United Way community impact efforts is to improve the lives of people in our communities. The RBA process is a strategic, time-efficient, ongoing, easy to understand, and measureable way by which we can ensure that the efforts we undertake to help people are resulting in the outcomes we seek.”

**Ted Granger, President
United Way of Florida**

“Results Based Accountability provides a framework for the kind of long-term thinking required to truly change community conditions. The RBA structure enabled us within a six month time frame to realign our community impact agenda around Education, Income and Health and at the same time, build a culture of measurement and shared accountability for results. Through a community driven process we selected four population results and their key indicators. We then used the concept of performance measures to help guide our contract negotiations with our community impact partners. We now have the ability to track, improve and report the results of our strategies on a quarterly basis. Results Based Accountability helped us accelerate our community impact agenda.”

**Dan Duncan, Senior Vice President of External Relations
United Way of Tucson and Southern Arizona**



"United Way of Central Iowa has utilized Results Based Accountability (RBA) methods for the past several years. Using RBA with community partners helps us to look at what they will do and who is better off, ultimately helping us measure towards community goals. The evolution of this work has allowed us to reach common measures for focus areas and has allowed for a greater common understanding of the work across the community. Recently UWCI adopted the Results Scorecard which feeds RBA information into a common dashboard, allowing us to see progress on program performance measures of partners and how the collective is advancing the common good by reaching our community goals. We are extremely excited about this tool as a way to share with our staff, board and community partners about progress on our collective work to turn the curve."

Nicole M. Beaman, MSW, LISW
Vice President of Community Impact
United Way of Central Iowa

"One of the reasons that the North Penn United Way has chosen to use Results Based Accountability (RBA) is the fact that it provides a systematic yet simple to use platform to determine community and agency goals and to attain community level and agency level results. We believe that the simple and common language approach is crucial to the unified work of multiple agencies and organizations. The education and training of RBA will allow the community and the agencies to develop just a few results as well as indicators of those results so that we all can gauge the effectiveness of their work. We are looking forward to how this will assist our community in addressing its needs and turning the curve with results. We are also excited to be able to make more strategic investment decisions."

Cheryl Clarke, Director of Community Impact
North Penn United Way (PA)

"The need to achieve results and accountability within the nonprofit sector has become the measuring stick for success. Utilizing the RBA framework has helped me develop a greater understanding of what it takes to improve the performance of programs, agencies, and service systems."

Mark Johnson, Vice President,
Community Funding and Special Initiatives
United Way of South Hampton Roads (VA)

"Results Based Accountability helps us to refocus and concentrate our energy on what we want to achieve in the community and to tailor our strategies to make that happen. It will also enable us to demonstrate our effectiveness to investors and gives us the data we need to build the capacity and effectiveness of funded agencies and other partners."

Diane R. Bessel, PhD, LMSW, CNM
Director of Community Impact
United Way of Buffalo & Erie County (NY)

"Using the Results Based Accountability Framework has been tremendously significant in the work we do in the central Maryland region. We have been able to clearly and succinctly articulate our results in the areas of Education, Income and Health. Having offered community trainings to our partners, we are working with community partners to achieve those results. Equally important is the fact that we are able to show our funders, stakeholders and the general public the impact of our work - how much we are doing, how well we are doing our work, the number of people who are better off, and the positive changes in our communities"

Marian Amoa
Assistant Director, Outcomes & Evaluation
United Way of Central Maryland (UWCM)

"We decided to marry our Community Impact model to RBA some years ago, and this journey continues to bring focus and direction to how we plan, partner, invest, and hold both our grantees and ourselves accountable for making a difference. Most recently, a board member sponsored an after-work celebration to honor 19 agencies with programs receiving a "high green" rating for RBA performance. Key stakeholders and donors are looking to our United Way to spread this kind of "partnership with accountability" throughout the nonprofit community."

Janice Lovegrove, Vice President, Community Impact
United Way of the Greater Lehigh Valley (PA)

"Our United Way is just at the beginning of using RBA. RBA is a tool that we can (and will) use with our agencies and grants process to ensure we are getting the expected results. Or if we are not getting the results, to be able to recognize this and make appropriate adjustments."

Anne Bryant
Executive Director
Franklin-Southampton Area United Way (VA)

For more information on how to get started,
please contact:



www.resultsleadership.org

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