



# 2022

IMPACT REPORT

## FROM THE BOARD CHAIR

Dear Friends,

In November, our organization celebrated a notable milestone, five years of grantmaking to improve the quality of life for older adults and their caregivers. As one of only a handful of philanthropic organizations in the United States that exist exclusively to benefit the older population, we're honored to celebrate this milestone...and we recognize that this is just the beginning.

Our population of older adults is growing rapidly. Soon there will be more people aged 65 and over than children under the age of 18. We think of this demographic shift as a golden opportunity to harness the wisdom and experience of our older generations, to create age-friendly spaces that are welcoming to all, and to demonstrate our commitment to ensuring that all people can live and age with dignity and independence.

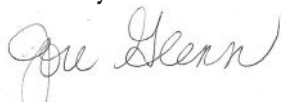
Our new funding & investment strategy, a summary of which you'll find on the following page, outlines a few of the ways in which NextFifty Initiative plans to achieve our goals of:

- Improving the quality of life for older adults
- Making sure organizations serving older adults have the resources they need to succeed
- Identifying, supporting, and replicating new and innovative approaches to aging
- Reducing ageism

We know we will be successful...we must! And we recognize that our success will be rooted in the deep, trust-based relationships that we build with grantees and other partners, especially those working to improve the lives of historically marginalized groups of older adults. We're working to reduce barriers to funding, be proactive in building relationships and trust with marginalized groups, and leverage our dollars and influence to change systems and policies so that all people have the opportunity to age well and with dignity.

Thank you to everyone who is with us on this journey. We look forward to working with you to create a world where older people are valued, cared for, and celebrated for their contributions to our communities and our world.

Warmly,



Joie Glenn

*Chair, Board of Trustees*





# WHO WE ARE

NextFifty invests in organizations, efforts, and systems that meet the needs of older adults – and that we all need to thrive in our next 10, 20 and 50 years.



## MISSION:

*To promote independence and dignity for the aging population, to include the needs of low and moderate income persons, encompassing individuals with physical, cognitive and/or behavioral disabilities, by encouraging and supporting innovative, affordable and coordinated services and initiatives.*

## VISION:

*NextFifty Initiative is a foundation that challenges thinking about aging by encouraging innovation. As a result of NextFifty Initiative's leadership, the lives of older adults will be enhanced.*

## VALUES:

*Accountability, Leadership, Learning, Innovation, Collaboration, Equity*



# FIVE YEARS OF IMPACT

In November 2022, NextFifty Initiative celebrated five years of grantmaking. Between 2017, when our first grant was awarded, and November 2022, we awarded more than \$50 million to organizations working to improve the quality of life for older adults and their caregivers. We partnered with hundreds of organizations to support a wide range of programs and efforts...from home-delivered meals to housing programs, creative aging activities, technology training, and more.

We're grateful for the organizations doing innovative, thoughtful work to create opportunities and meet the unique needs of older people. And we're excited to see what we can achieve together in our next five years.

## During our first five years of grantmaking, NextFifty Initiative...



Invested

**\$50.02 MILLION**

in the work of organizations that support older adults & their caregivers



Awarded

**755 GRANTS**

to organizations nationwide



Supported programs and projects in

**16 UNIQUE FUNDING AREAS**

(largest areas funded: Community Life, Health, Social Services, Housing, Technology)



Invested in organizations located in

**48 COLORADO COUNTIES**

and other states around the U.S.

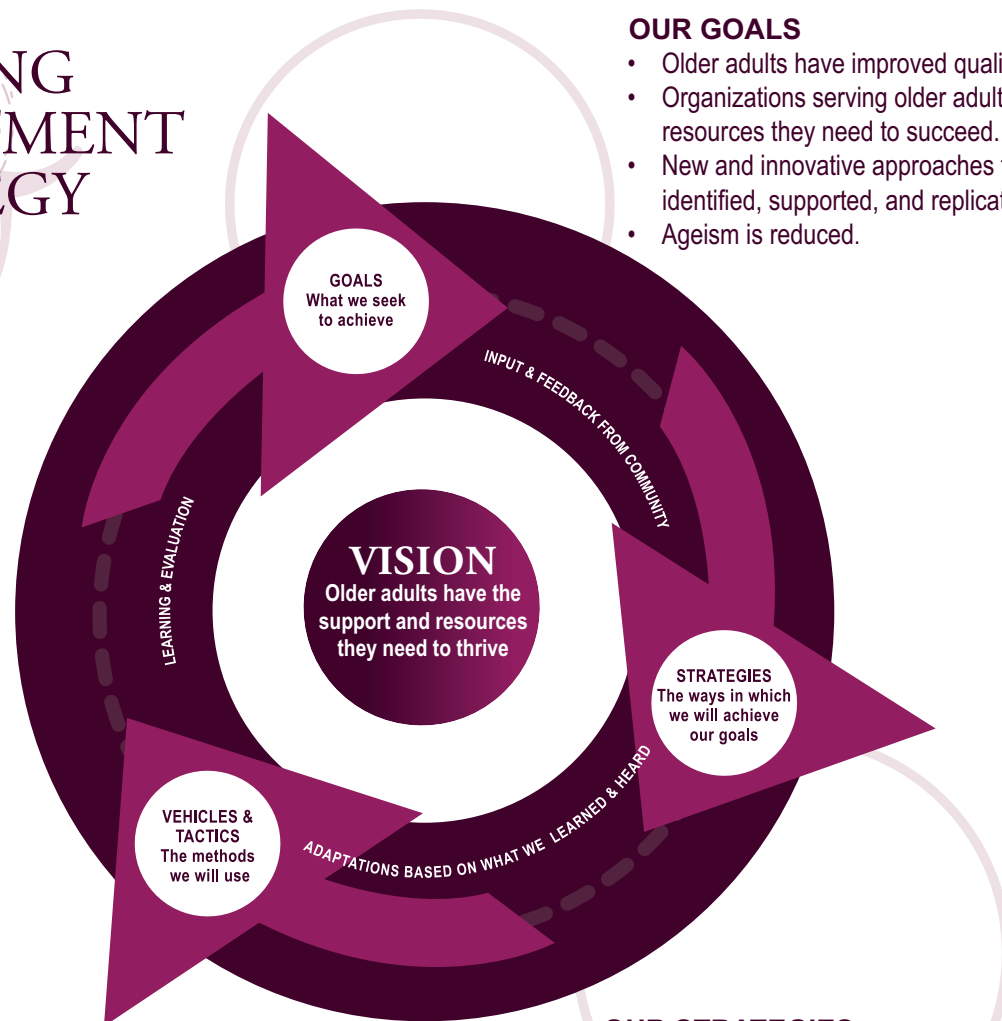
# A ROADMAP FOR THE FUTURE

As our organization has grown, we've worked to more clearly define our goals and strategy. We've also explored new ways to have impact, such as social impact investing and more intentional policy and advocacy efforts.

This work culminated in our Funding & Investment Strategy, which we announced in December of 2022. The strategy brings together what we've learned through our past grantmaking efforts as well as what we have heard from partners, grantees, older adults, and community leaders interested in issues related to aging and longevity.

This mission-driven strategy provides a roadmap for the future and helps ensure our financial and social capital is used in ways that helps us realize our vision.

## FUNDING INVESTMENT STRATEGY



### OUR GOALS

- Older adults have improved quality of life.
- Organizations serving older adults have the resources they need to succeed.
- New and innovative approaches to aging are identified, supported, and replicated.
- Ageism is reduced.

### OUR VEHICLES & TACTICS

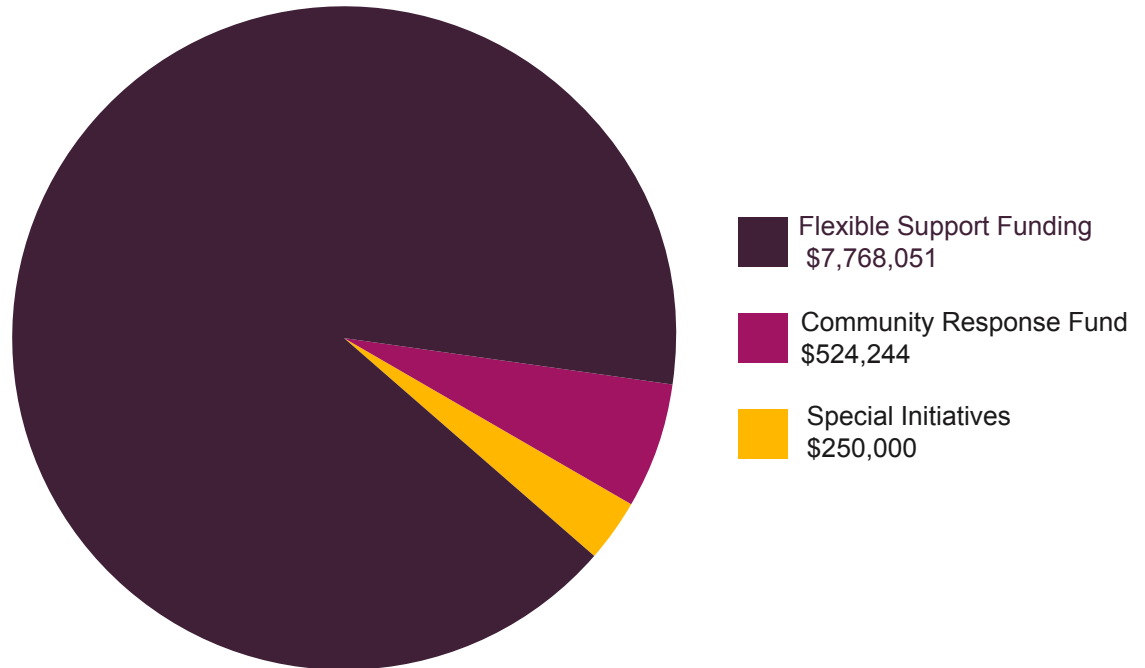
- Direct grants to organizations contributing to improved quality of life for older adults.
- Investments in innovation and technology that will advance longevity or enhance aging.
- Policy and advocacy work to educate and influence leaders on issues related to aging and longevity.
- Private sector partnerships that align with our vision and mission.
- Convenings to learn about community needs, connect people working on aging initiatives, and align efforts with others in the aging space and/or philanthropy for greater impact.
- Sharing our learnings to bring greater awareness to aging/longevity issues and advance the work.

### OUR STRATEGIES

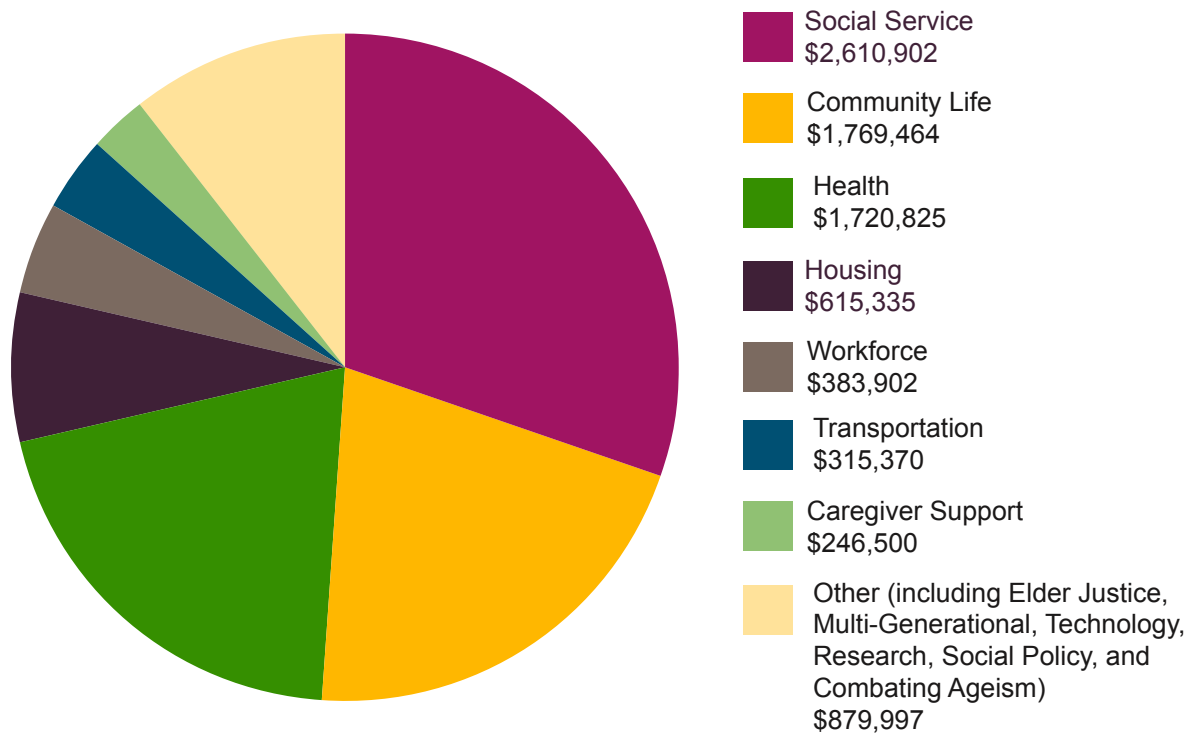
- Elevate issues related to aging and longevity.
- Financially support organizations and efforts meeting — or seeking to learn about — the needs of older adults.
- Promote equity by supporting initiatives that address the intersectional identities of older adults and acknowledge how those identities affect the way people age and access care.
- Identify and stimulate innovative approaches and initiatives to advance healthy aging.
- Serve as a leading voice and influencer on systemic issues impacting older adults.

## GRANTS AWARDED, 2022

### Grants Awarded by Type Total Awarded \$8,542,295



### Grants Awarded by Funding Area



# IMPACTING THE LIVES OF OLDER ADULTS

In recent years, we've leaned into the idea that prioritizing building solid relationships and trust with the organizations we fund can lead to more positive outcomes and greater capacity for those organizations. Through both Flexible Support funding and our Community Response Fund, we've sought to simplify processes for applications and reporting, as well as trust grantees to know how funds can best be used to meet their goals related to improving the lives of older people. The response has been incredibly positive.

“The unrestricted funds were invaluable, and the program officer was outstanding. Many funders don't wish to have a relationship with their grantees, making the process all online. NextFifty takes a personal approach to build relationships and a partnership to understand our strengths and challenges.”

— anonymous feedback from a current grantee,  
*GrantAdvisor.com*

## Home Repair Program Helps Older St. Louisans Remain in Their Homes

**Mission: St. Louis** wants to break the cycle of poverty in St. Louis--and they believe keeping older adults in their homes and neighborhoods is a key element of that work. But helping older St. Louisans remain in their homes can be a challenge. The city has an aging housing stock and 85 percent of older residents face a high housing cost burden, meaning owning and maintaining their home requires more than 30 percent of their income.

The organization's Home Repair Program provides the repairs and home modifications needed to help older adults continue living safely in their homes. They install grab bars, fix plumbing, put in window AC units, install new locks and security lighting, complete weatherization projects, and more. They also help connect residents to other services, like food programs and legal services, if needed.

With funding from NextFifty Initiative, Mission St. Louis was able to more than double its capacity, completing 2,978 home repair projects for 198 older adults. In addition to expanding their team dedicated to home repairs, a new work van and project management software helped make the team more efficient.

“...You trusted us and just gave us the funds and said, ‘go do good work’,” said Todd Martin, director of the Home Repair Program. “And we really take that seriously and really wanted to be good stewards. Even through small stories, you can really see the impact that you've had on our organization, on this team, but much more so on the city as a whole.”



*Mary Bobo, a client of Mission: St. Louis, had new handrails installed on her front steps by the Home Repair Team. Repairs and home modifications completed by the organization help area residents remain independent in their own homes. Photo: Colleen O'Connell Smyth, Mission: St. Louis.*



## Focusing on Needs of Older Immigrants Leads to Specialized Programs

Prior to partnering with NextFifty Initiative, the **Hispanic Affairs Project (HAP)** hadn't put much thought into how the needs of the older clients they served might differ from those of younger clients. The grassroots organization, which supports immigrant integration in Western Colorado, had always served older adults, but focusing specifically on this group was eye-opening.

Older adults were concerned about the lack of stability and security they might face when they were no longer able to work. Many who'd spent years paying into Social Security and Medicare needed help navigating the permanent residency or naturalization processes that would ensure they could access these benefits. Older adults living in mobile home parks were facing increasing housing costs at a time when they had fewer options for growing their income.

With support from NextFifty, HAP created specific goals for serving the older immigrant community. Through educational events, targeted communications, legal assistance, resource navigation, and leadership development, their older clients have had greater access to resources and felt more connected and empowered to speak up about the challenges they face.

“Older adults really add a lot to the community we work with—through their wisdom, experience, and commitment to family,” said Karen Sherman Perez, HAP's Community Relations & Development Director. “Our older population has always been actively engaged in our work and thanks to their participation, we've had a more visible impact in our efforts to advocate for equitable change.”

Sherman Perez credits HAP's success in working with immigrants in part to the organization's focus on building relationships and trust. Trust—including the flexibility to use grant funds as needed to support older clients—is a key piece of what's made the partnership with NextFifty Initiative work, as well. “We are learning as we go and oftentimes need to shift what we are doing because we hear about new community priorities,” said Sherman Perez.



*Juana and Marcelino Garcia of Montrose share a message about the importance of “liberty” for HAP's Immigrant Heritage Month gathering on June 20, 2022. Community members received an Immigrant Heritage Month proclamation from the Montrose City Council and, afterward, shared thoughts on the important contributions of immigrants to our community and nation. Photo: Hispanic Affairs Project.*



*Angela Uribe of Montrose became a U.S. citizen with support from HAP's immigration legal assistance program. Here, she shares a message about “tranquility” as part of HAP's 2022 Immigrant Heritage Month gathering.*



## Program Brings Outdoors and Wildlife to Residents of Care Facilities

When older adults have access to nature and a sense of the “wild,” they experience better mental, physical, and social health. But access to outdoor spaces and wildlife can be limited for residents of assisted living, skilled nursing, and memory care facilities, so horticulturalists from the **Butterfly Pavilion** created the Healthy Habitats Gardening program to bring outdoor experiences to residents.

With support from NextFifty Initiative, Butterfly Pavilion, the first Association of Zoos and Aquariums-accredited, stand-alone, non-profit invertebrate zoo in the world, was able to expand the program, bringing the joys of gardening and engaging with wildlife to older adults in more care facilities. Program participants learn about pollinator gardening, work with staff to plant a habitat garden, and raise and release butterflies into their garden.



*Residents of Good Samaritan Society's Fox Run Senior Living community in Greeley, Colorado, work together to create and maintain a pollinator garden. Butterfly Pavilion provides materials, education, and support to help older adults in assisted living and long-term care facilities access outdoor spaces and wildlife through their Healthy Habitats Gardening program. Photo: Butterfly Pavilions.*

“These small pockets of habitat are often the only link older adults residing in care facilities have to the outdoors, to their histories with gardens and the earth, and to the opportunity to care for something,” said Ashley White, Community Habitats Manager at Butterfly Pavilions.

As the program has grown, staff and volunteers have learned they must adapt the program to the unique needs of residents in each facility and were grateful that the flexible nature of the funding allowed them to do that, as needed. “The residents are colorful and wildly unique in each community,” said Ashley, “and care should be given colorfully and uniquely, accordingly.”

## Home Health Care Agency Explores Use of Robots to Augment Care

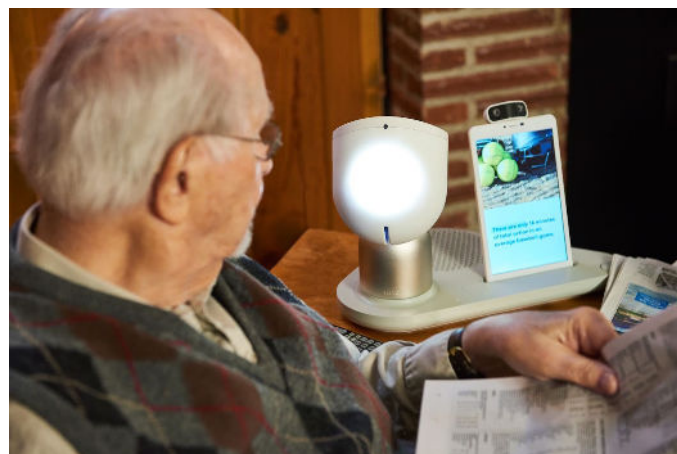
For years, Tim Leddy, CEO of **Visiting Nurse Services (VNS) in Westchester**, had been considering doing something a bit radical to address the shortage of home health aides he and other home healthcare agencies were experiencing. He wanted to research and pilot a home care robot program, and ultimately deploy a fleet of robots to complement the work of home health aides.

Leddy and his team saw this as a potential way to provide care to additional people as well as provide more total hours of care for patients. They also believed a home care robot program could reduce rehospitalizations resulting from patients forgetting to take medications and reduce rates of isolation and depression among home-bound older adults.

With funding from NextFifty, Leddy's team researched available options. While they discovered that few robots had been adapted especially for home care, they were able to identify and select a "social robot" to pilot with a small number of patients. The robot, ElliQ, reminds patients to take medications, provides social interaction, guides patients through breathing or chair yoga exercises, and even tells an occasional joke. They hope to work with technology companies in the future to customize robots to do other tasks more specific to home care.

“Our goal is to help people feel more independent,” said Leddy. “We have 14 [of the robots] out and now the fun stuff comes—the data collection.” The team will analyze how much patients interact with the robots as well as whether goals related to reduced hospitalizations and improved mental health are being achieved.

Flexible funds from NextFifty gave VNS Westchester the independence they needed to experiment with a unique way of providing care to older adults. “I’m excited,” said Leddy, referencing other organizations he’s talked to who are also exploring this option. “NextFifty Initiative opened doors for us, expanding our network. We’ve made lots of connections.”



*In response to a shortage of home care aides, VNS Westchester is piloting use of ElliQ, a companion robot that supplements the work of home health aides. ElliQ reminds patients to take medications, guides them through simple physical exercises, and provides companionship. Photo: Intuition Robotics.*

## Grants Help Colorado Nonprofits Respond to Sudden and Urgent Needs

a nonprofit organization's ability to serve their community.

In 2019, we launched the Community Response Fund, offering grants of up to \$25,000 to meet the urgent, one-time needs of Colorado nonprofit organizations serving older adults. Grants awarded funded wheelchair-accessible vehicles, specialized equipment, critical repairs, and other projects or items that would have an immediate impact on

In 2022, we awarded 28 Community Response Fund grants, totaling \$524,244. Here are two examples of organizations that received funding:

- **All Points Transit** provides safe, reliable, and accessible transportation in Montrose County, allowing residents to continue living independently and enhancing their quality of life. After several catalytic converters were stolen from vehicles in their fleet, All Points requested funding from NextFifty's Community Response Fund to purchase and install catalytic converter locks on vehicles in the fleet. The funds provided will help All Points Transit keep their vehicles on the road and in service to older adults in the area.
- In rural Ignacio, Colorado, older adults have relied on the **Southern Colorado Community Action Agency** for non-emergency medical transportation services. Unfortunately, when Medicaid's requirements for this type of transportation changed, the group had to discontinue many of their services. Funding from NextFifty's Community Response Fund helped the organization equip their vehicles with the newly required GPS and two-way radio systems needed to get back on the road.



# NEXTFIFTY INITIATIVE TEAM

(as of June 19, 2023)

## Staff

Rachel Angard  
*Administrative Manager*

Nate Beidler  
*Grants Manager*

Sydney Byer  
*Program Officer*

Su Chae  
*Director of Finance and Accounting*

Amy Daly  
*Director of Communications*

Gina Del Castillo  
*Community Engagement Officer*

Susan Hill  
*Program Officer*

Jillian Kelly  
*Senior Program Officer*

Chandra Matthews  
*Director of Programs*

Bria Ward  
*Director of People & Culture*

Roop Wazir  
*Program Officer*

Tiffany Welch  
*Program Operations Officer*

## Board of Trustees

Kristine Burrows  
*Trustee*

Marco Chayet  
*Trustee*

Joie Glenn  
*Chair*

Maureen Hanrahan  
*Vice Chair*

Vatsala Kapur  
*Trustee*

Eric Kuhn  
*Trustee*

Sekhar Paladugu  
*Trustee*

Kenneth D. Taylor  
*Treasurer*

## At-Large Committee Members

Todger Anderson  
*Investment Committee*

Donnell Heistand  
*Finance Committee*

Niels Jepsen  
*Investment Committee*

Gary Wagner  
*Investment Committee*



INITIATIVE

2000 S. Colorado Blvd., Tower 1, Suite 5500 | Denver, CO 80222 | [www.Next50Initiative.org](http://www.Next50Initiative.org) | 303.547.1800



next50initiative



@50initiative



NextFiftyInitiative