



INITIATIVE

# STRONGER STILL





## To say the last two years have been challenging

would be a tremendous understatement. And yet, what we've observed from organizations that serve older adults is a desire to stand tall. To adapt in innovative and thoughtful ways. To leverage partnerships to sidestep obstacles and meet community needs.

Inspired by our partners, we too have adapted to meet the challenges of this time. To be a better partner. To respond more quickly. To ask less and listen more. We're proud of what we accomplished in 2021, and we're proud of how we've changed and grown. **Like you, stronger still.**



## FUELING INNOVATION. TRANSFORMING GENERATIONS.

**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.



## FROM OUR LEADERSHIP

Dear Friends,

Last year, as the COVID-19 pandemic wore on, NextFifty Initiative quietly entered its fifth year as a philanthropic organization dedicated to supporting older adults and their caregivers. How much has changed—how much we have *all* changed—during that five years!

We've evolved, grown, and faced many challenges—from creating the systems and processes that will carry us forward as an organization to figuring out how best to prioritize and meet the needs of organizations dedicated to serving older adults. And, when the pandemic hit, we did what everyone did. We flexed. We adapted.

And we'd like to think NextFifty Initiative is stronger as a result.


In nature, strong winds cause trees to grow stronger. In fact, it's vital to their long-term survival. To compensate for the stress wind puts on the load-bearing structure of a tree, the tree grows reaction wood, which has a different cellular structure than regular wood. The reaction wood, which forms on the underside or top of a branch depending on the type of tree and its environment, prevents branches from bending and cracking under their own weight.

That's not all. Trees allowed to sway freely in the wind also grow deeper roots, making them more resilient to the next storm. And the storm after that.

We're grateful that the stiff winds that prevailed over the past two years pushed us to grow and adapt in deeper, more meaningful ways. And we're grateful to have witnessed the same thing happen with so many of the organizations we support. Roots are deeper. Branches are stronger. We continue to be impressed by the creativity, adaptability, and resiliency we see from organizations committed to supporting older adults.

We want to express gratitude to everyone who's made improving quality of life for older adults and their caregivers their passion and a part of their life's work. Together, we are building stronger communities and contributing to a more caring, intergenerational, and age-friendly world.

With gratitude,

  
Diana McFail  
President & CEO

  
Joie Glenn  
Chair, Board of Trustees



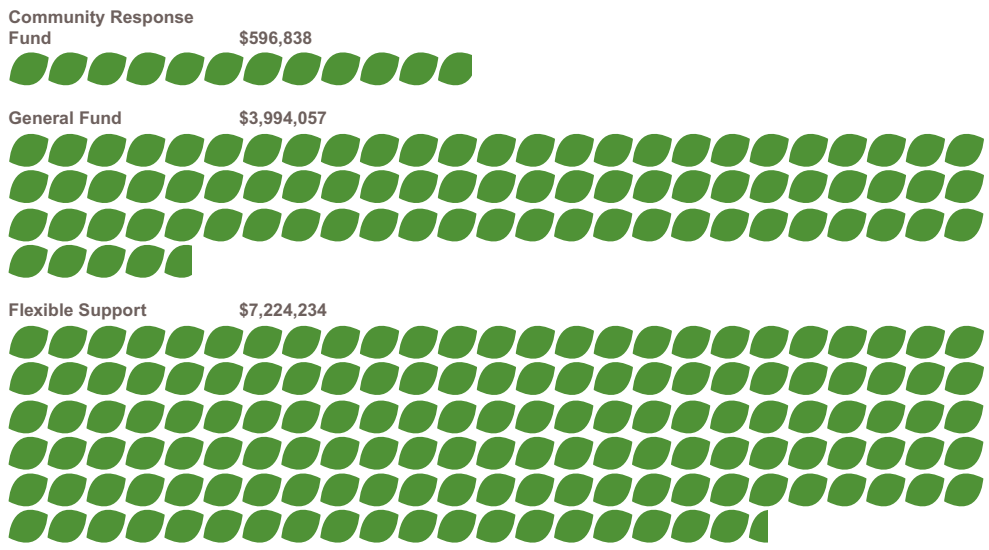
*Photos courtesy of  
Project Angel Heart,  
CLLARO, and  
Brothers Redevelopment.*



# IMPACTING THE LIVES OF OLDER ADULTS

In 2021, we offered three different types of funding to empower and enable organizations to meet the needs of older adults and their caregivers: General Funding, Flexible Support, and Community Response Fund.

**FUNDING**  
**IN 2021**  
DOLLARS  
AWARDED  
BY  
GRANT  
TYPE



**OUR**  
**REACH**  
DOLLARS  
AWARDED  
COUNTY  
TYPE



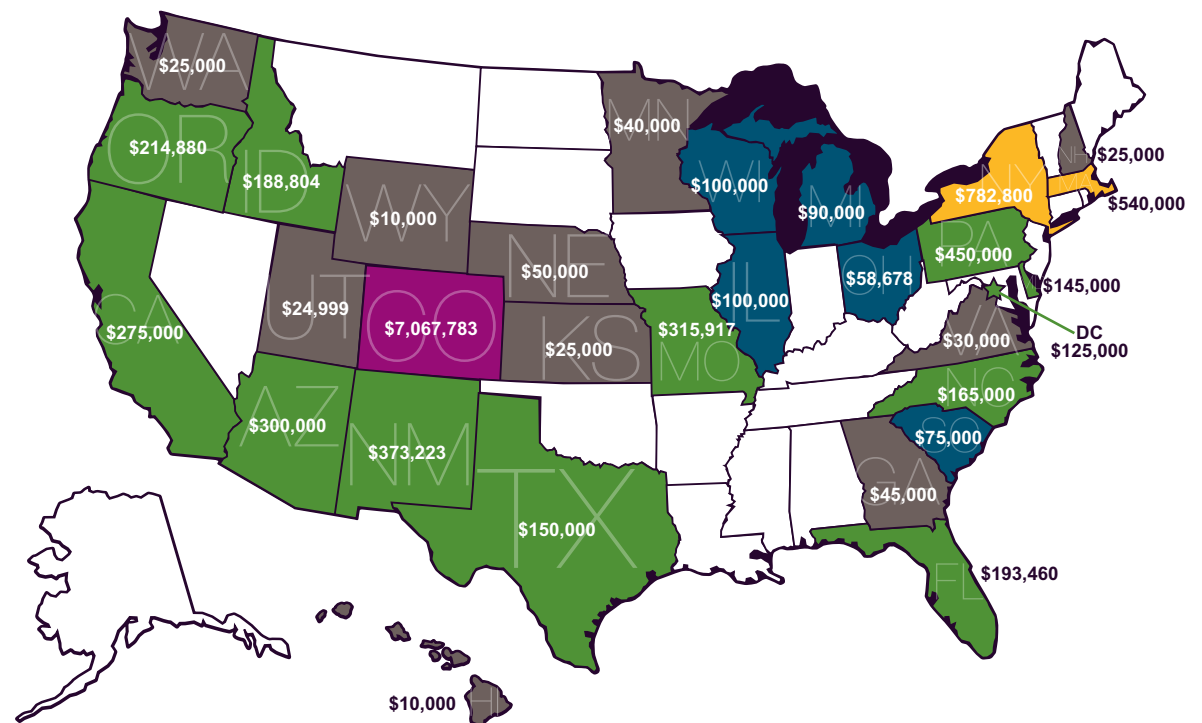
= \$50,000



AREAS  
OF  
IMPACT  
DOLLARS  
AWARDED  
BY  
FUNDING  
TYPE



AREAS  
OF  
IMPACT  
DOLLARS  
AWARDED  
BY  
STATE





**General Funding, our traditional funding opportunity, was created to support projects, ideas, technology, and innovations that improve the lives and capacities of people as they age.**

**Grantee Spotlight:**  
**Life Story Club**

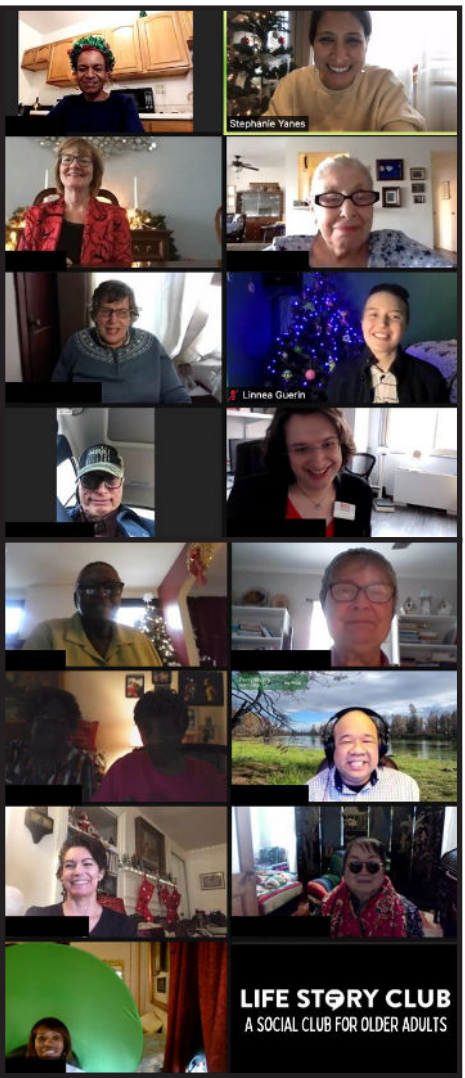
Even before the COVID-19 pandemic, many older adults were facing social isolation and loneliness, factors associated with higher rates of depression, increased risk of dementia, and higher incidence of cardiovascular diseases. Once the pandemic hit, loneliness became as big of a problem as the virus itself, especially for older adults particularly vulnerable to the virus!

One organization working to alleviate social isolation is Life Story Club, a New York-based nonprofit organization founded in 2019 to help end loneliness by involving older adults in small social clubs where they can share life stories and build friendships. They specifically sought to work with older adults most at-risk for loneliness and isolation, including the medically homebound and those requiring home care, and offered clubs in both English and Spanish.

When COVID-19 struck, Life Story Club swiftly shifted gears and began offering their in-person program virtually. To remove technology barriers, they created a staff-assisted phone dial-in feature, where facilitators could call an older adult’s phone directly and then merge them into a teleconference. The dial-in feature, which increased accessibility for low-income older adults with limited access to technology, is something the organization plans to continue post-pandemic.

“One of the most exciting things for our team is to see evidence of friendships and camaraderie born through our groups,” said Lily Zhou, founder of Life Story Club. “For instance, when someone provided verbal encouragement, others in the group reinforced the behavior, or when someone shared a funny memory, not only was the laughter contagious, but it tended to also ignite a memory from other members, helping individuals to feel less alone as they became aware of all the commonalities shared.”

“They don’t let the digital divide get in their way,” said Jillian Kelly, senior program officer at Next Fifty Initiative. “They’ve figured out a way to meet people’s needs and use the phone to connect clients to the meetings. They take a proactive approach in in getting people connected, and they’re getting people to build wonderful relationships.”



*Sharing their stories in virtual meetings helped Life Story Club participants build friendships and stay connected, even during COVID-19 lockdowns. Photo courtesy of Life Story Club.*



Grantee  
Spotlight:  
Gunnison  
Senior  
Center

Programming and services for older adults in the Gunnison Valley, a rural area in western Colorado, got a boost over the last few years due to a unique partnership between the city's Parks & Recreation Department, which operates the Gunnison Senior Center, and Western Colorado University (Western), a small university in Gunnison.

With an aim of helping the senior center better serve older adults in the area, the city created a 2-year graduate assistantship, funded by NextFifty Initiative, for a Western student. The plan? Combine academic research, input from health providers, and feedback from older adults to create richer, more engaging programming. The result? All that and more!

The first graduate assistant, Aaron Gouw, quickly got to work, getting to know the community, asking what older adults wanted and needed, and establishing priority areas that included fall prevention, mental health, and community engagement. And then...COVID-19 struck.

Gouw and the senior center team adapted, offering programming online and getting involved directly in the county's pandemic coordination effort. Outreach during the delivery of meals and medicine to older adults helped Gouw and the team uncover food security issues as well as an uptick in mental health needs. His fall prevention program, specifically requested by older adults, was a success, despite challenges posed by the pandemic.

When Gouw completed the assistantship, the city opted to continue the program. And, thanks to a new Western program focused specifically on rural health, the partnership will grow and engage even more students in working with older adults.

The best part, said senior center coordinator Elizabeth Gillis, is the intergenerational engagement taking place. "Having a young professional doing their master's degree to speak with, laugh with, go on hikes with, take classes from, have meals with—these [interactions] were just as beneficial as the programming, in my view," said Gillis.

"This is a great example of this organization that has come to life by listening to the voices of older adults and responding to them," said Susan Hill, program officer at NextFifty Initiative. "They created a win-win relationship between the university and the senior center. There's an intergenerational component, and they recognized that each brings something to the other."



Older adults in the Gunnison area are benefiting from a unique partnership between the Gunnison Senior Center and Western Colorado University. Photos courtesy of Gunnison Senior Center.



## Flexible Support

In 2021, we introduced Flexible Support, a uniquely flexible funding opportunity available to organizations that serve, or seek to serve, older adults. Instead of being asked to describe a specific project plan and budget, Flexible Support grant applicants were asked about their goals for improving the lives of older adults and how funding from NextFifty would help them achieve those goals.

### Grantee Spotlight: CLLARO

In the aftermath of COVID-19, leaders at the Colorado Latino Leadership Advocacy and Research Organization (CLLARO) could see that the Latino community had experienced compound losses: disproportionate loss of life, income, education, and resources. The impact on older adults was especially profound.

Since 1964, CLLARO has been helping Latinos in Colorado solve problems facing their communities. This includes creating equitable opportunities for all Coloradans and improving quality of life for Latinos in the state.

During the pandemic, CLLARO worked to connect older Latino adults with COVID-19 vaccines, make sure basic needs were met, and encourage 2020 census participation. Now, as the pandemic wanes and the rhythms of life shift again, CLLARO is working with older adults to find out what they need to move forward.

With funding from NextFifty Initiative, CLLARO conducted a series of focus groups with older adults and their caregivers. To put participants at ease, the focus groups included lotería games in addition to conversations about the needs they are experiencing.

They learned participants were concerned about chronic health conditions, oral health resources, financial stability, and loneliness. Based on what they learned, CLLARO created educational sessions and provided resources to address those concerns.

“CLLARO is having in-person gatherings with Latino older adults, their caregivers, and grandchildren, and I have learned that you can’t separate those three,” said Bibian Labra Reyes, program manager. “Many of our Latino older adults are still working and are taking care of their grandchildren.”

“Thanks to NextFifty’s funding, CLLARO is working to become an ally, resource, and a voice to our community of Latino older adults,” said Reyes.

“The work CLLARO has done and continues to do helps the Latino community have a voice that typically or often has not been heard,” said Gina Del Castillo, Community Engagement Officer at NextFifty Initiative. “This organization has made an impact for older adults in so many ways.”

*Lotería games put older adults at ease during focus groups designed to help CLLARO gather information about specific needs in the Latino older adult community. Photo courtesy of CLLARO.*



## Flexible Support

### Grantee Spotlight: SOS Meals on Wheels

“When the pandemic hit the week of March 16, 2020, our phone lines exploded with calls for help,” said Daniel Ashbrook, development director for SOS Meals on Wheels, a nonprofit in California’s Alameda County that provides home-delivered meals for older adults. Their clients are often homebound, low-income, and unable to shop or prepare meals due to health and disability issues and a lack of caregiver support.

Knowing older adults, especially those with health conditions, were vulnerable to the COVID-19 virus, the organization set a goal of saying “yes” to every eligible person who asked for help. They quickly went from serving close to 1,200 people per month to over 1,800. Delivery routes increased from fifty to over 90. By the end of that year, they’d delivered a record 566,773 culturally responsive meals to 3,047 people.

The rapid growth caused growing pains. SOS Meals on Wheels needed more space to store meals, accommodate additional staff, and allow for social distancing. With funding from NextFifty Initiative and others, they added an office suite and expanded the kitchen and warehouse. They improved their data tracking and reporting capabilities and improved efficiencies in areas like payroll, volunteer management, and fundraising.

The SOS Meals on Wheels team knew that clients relied on their meal deliveries. They couldn’t afford a closure or temporary service delay due to a COVID-19 breakout. So they took no chances with health and safety, implementing mask and vaccine mandates, temperature checks at building entrances, air purification systems, remote work arrangements, social distancing, virtual meetings, and other safety measures.

They also created a no-contact meal delivery policy, asking volunteers to hang meals on the doorknob, knock, and then step away from the door to greet clients and do a wellness check.

The organization committed to saying “yes” to every eligible client, and they did. Not one person was put on a waiting list, a remarkable feat during a turbulent time.

“This organization was willing to take on the challenges associated with expanding during the COVID-19 pandemic.” said Jillian Kelly, senior program officer at NextFifty. “They’ve been thoughtful about the way they’ve expanded, including increasing the diversity of meals to respond to cultural differences in the communities they serve.”



*SOS Meals on Wheels grew significantly during COVID-19 pandemic due to an increased need for medically tailored, home-delivered meals. Photos courtesy of SOS Meals on Wheels.*

## Community Response Fund

**When rural nonprofit organizations serving older Coloradans let us know they were having a hard time finding funding for urgent, one-time needs, we created the Community Response Fund. The fund offers grants of up to \$25,000 for things like wheelchair-accessible vehicles, specialized equipment, repairs, etc. that can have an immediate impact on a nonprofit organization's ability to serve older adults.**



### Grantee Spotlight: The Learning Council

The Learning Council, a nonprofit organization located in rural Paonia, Colorado, exists to support lifelong learning and education as a resource for everyone, including the area's older adult population. As often happens in small communities, that mission plays out in a variety of interesting—and sometimes unexpected—ways! And this was especially true as the organization adapted to the realities and community needs created by COVID-19.


Recently, the Learning Council received NextFifty Initiative Community Response Fund dollars to purchase and operate a wood fire pizza oven and other cooking equipment. The pizza oven has become an unconventional way to bring older adults together around a shared love...pizza!

The Council uses the oven to cook for Seniors on Farms, which is a program that brings older adults together to visit farms and enjoy a locally grown meal, and to produce meals delivered to older adults through the Learning Council's Buddy System. The Buddy System, created in response to COVID-19, pairs older residents and younger neighbors for deliveries of groceries and meals, companionship, and more. Due to the success of the program, the Learning Council plans to continue it even as COVID-19 evolves.

The oven is also an important fixture at the Arbol Farmers Market, a market started by the Learning Council to bring generations together, promote locally produced foods, and provide financial support to farmers hard-hit by the pandemic.

Alicia Michelsen, executive director of the Learning Council, noted one interesting effect of the organization's increased focus on involving older adults in their programming. "In the past two years as our services have reached more and more older adults, we are experiencing an increase in participation of older adults in our activities, as teachers, volunteers, and collaborators. We are excited to have a broad spectrum of participation in our events and a powerful team of older adults leading the way," said Michelsen.

"The pizza oven provides a unique way to engage older adults in the community," said Jillian Kelly, senior program officer at NextFifty Initiative. "We love that it is inspiring older adults to get more involved."



*The Learning Council's wood-fired pizza oven has become a unique way to engage older adults in the community. Photo courtesy of The Learning Council.*



### Grantee Spotlight: Steamboat Creates

Steamboat Springs, located in rural Colorado, is well-known as an art-friendly community and a place where many artists choose to make their homes. One reason for this is Steamboat Creates, an organization that exists to advocate for arts, creativity, and culture throughout the Yampa Valley.

When the COVID-19 pandemic struck, Steamboat Creates found that, through digital outreach and virtual programming, they could continue to serve their tight-knit community of artists, a significant percentage of whom identify as older adults. They offered monthly conversations to keep people engaged and help older community members avoid loneliness. They offered on-line exhibits and talks with renowned artists.

They also offered a specific arts program designed to help participants, artists and non-artists alike, deal with feelings of grief, isolation, and uncertainty, the need for which had grown during the pandemic. The program's virtual format helped organizers reach a key audience, people over age 50, including those in assisted living facilities.

To keep everyone safe, the Steamboat Creates staff worked mostly virtually, using personal computer equipment that wasn't ideal for the delivery of high-quality programs. They realized they needed better equipment and, with funding from NextFifty's Community Response Fund, they were able to get it. New computers and printers allowed the team to work safely at home while delivering programs that helped older adults stay connected.

Participation in some virtual programs was higher than when the programs were offered in-person. The virtual format increased access, allowing more people to participate in a way that felt safe and convenient. They also discovered that virtual outreach throughout the year led to tighter connections with older adult members and the greater community.

"They were really clever in figuring out ways the arts can be helpful, whether you're artistic or not!" said Susan Hill, program officer at NextFifty Initiative. "In these difficult times, in a rural community, older adults who were isolated--even before COVID--found happiness in this virtual connection."

*New computer equipment helped Steamboat Creates safely maintain relationships—and even build new ones!—with older adults in their rural community. Photos courtesy of Steamboat Creates.*

## NextFifty Initiative: Our Own Story of Adaptation

Organizations working with older adults already face myriad challenges – workforce disruptions, limited funding, and the complex challenges that come with meeting the needs of older adults in a world that doesn't always prioritize its oldest members. The additional challenges created by COVID-19 compounded these issues, causing burnout, fatigue, and in some cases, the closure of important programs.

We see these challenges. We hear and understand how difficult it has been. And so, like the organizations we fund, we too flexed and adapted in response to the COVID-19 pandemic. Here are a few of the adaptations we made to better meet the needs of grantees and the community of organizations working to improve quality of life for older adults:

**Based on what we heard from organizations serving older adults**, we created a flexible support funding opportunity to provide dollars that can be used flexibly. Instead of asking grant applicants to articulate a specific project plan and budget, we asked applicants about their goals for improving the lives of older adults and how the funding would help them achieve those goals.

**We sought to learn more about trust-based philanthropy** and how this approach might integrate into our funding strategy at NextFifty Initiative. Trust-based philanthropy is a nationwide movement to address the inherent power imbalances between foundations and nonprofits. It's rooted in a set of values that help advance equity, shift power, and build mutually accountable relationships. In line with these values and what we learned, we simplified our grant application and reporting processes, making room for more conversations, and paving the way for deeper relationships and mutual accountability.

**We worked on broadening our diversity, equity, and inclusivity efforts**, seeking ways to create more equitable opportunities within our organization and in the ways we invest our resources. We looked deeply at both our organizational culture and our approach to diversity, equity, and inclusion, and formulated plans for how to move forward.

**Lastly, we unveiled a strategic plan** that will help NextFifty Initiative move into a new phase of maturity and growth. The three-year plan included the following goals:

- Build the foundation for organizational diversity, equity, and inclusion.
- Create and implement a diverse and coordinated funding, investment, and partnership strategy.
- Develop, implement, and communicate organizational thinking around innovation in a way that advances NextFifty Initiative's mission.
- Demonstrate NextFifty Initiative's contributions towards positively impacting the aging population.
- Create an equitable organizational culture maximizing collaboration, respect, and growth.



*Photos courtesy of Gunnison Senior Center, Project Angel Heart, SOS Meals on Wheels, and CLLARO.*



## Statement of Financial Position

### Assets

Current Assets	\$1,089,263
Investments	\$259,917,420
Fixed Assets	\$49,422
Total Assets	\$261,056,105

### Liabilities and Net Assets

Current Liabilities	\$1,323,341
Net Assets	\$259,732,764
Total Liabilities and Equity	\$261,056,105

For the period ending December 31, 2021. Statement of Financial Position is based on draft audited financials. The board has approved the draft audit contingent on the receipt of year end Private Equity statements. Final audit will be released once these statements have been received.

## NextFifty Initiative Team (as of 6/20/22)

### Staff

Rachel Angard  
*Administrative Manager*

Nate Beidler  
*Grants Manager*

Su Chae  
*Director of Finance and Accounting*

Amy Daly  
*Director of Communications*

Gina Del Castillo  
*Community Engagement Officer*

Susan Hill  
*Program Officer*

Craig Kapral  
*Learning & Evaluation Officer*

Jillian Kelly  
*Senior Program Officer*

Sydney Langer  
*Program Officer*

Chandra Matthews  
*Director of Programs*

Diana McFail  
*President & CEO*

Bria Ward  
*Director of People & Culture*

Roop Wazir  
*Program Officer*

Tiffany Welch  
*Program Operations Officer*

### Board of Trustees

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Marco Chayet

Joie Glenn, *Chair*

Maureen Hanrahan, *Vice Chair*

Vatsala Kapur

Eric Kuhn

Debra Lappin, *Secretary*

Sekhar Paladugu

Andrew Selig

Kenneth D. Taylor

Molly Wink, *Treasurer*

### At-Large Committee Members

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*Investment Committee*

Donnell Heistand  
*Finance Committee*

Niels Jepsen  
*Investment Committee*

Gary Wagner  
*Investment Committee*



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