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Summary of Foundations' Support to the Elderly

Senior Consulting ("SC") has conducted many related research projects in 2006, summarized in the Report "Senior Housing and Long Term Care, Shortfalls for Low-Income Americans." SC researched owner/operators of five or more properties of primarily a) Skilled Nursing Facilities ("SNF"), 2) Assisted Living Facilities ("ALF") and 3) Senior Housing options including affordable senior housing ("SH"). Of 334 SNF and ALF operators, only 18 were nonprofit while 154 of 223 SH operators were nonprofit.

One conclusion from the Report was that nonprofit providers provide better quality care overall in a long term care setting, but with few nonprofit operators, there is limited opportunity without greater support within specific communities and operators. A not surprising second conclusion was that nonprofit and church organizations in particular were the majority of sponsors and operators of affordable and low-income senior housing. Nonetheless, by some estimates, the country needs millions of low-income senior housing units for seniors alone. Lastly, while for profit providers rarely "partner" as providers, collaboration in the nonprofit sector is commonplace between multiple providers for the common good. Therefore, as part of this research, SC conducted two separate analyses of charitable giving and collaborative support to senior related charities, an analysis of the 100 largest Community Foundations ("CFs") and the 50 largest Private Foundations ("PFs") based on assets, as well as over 30 smaller foundations that have charitable purposes in support of elderly initiatives.

As of 12/31/03 and research of the Foundation Center, there were 699 CFs nationwide organized to provide charitable giving for defined regions. CFs have been experiencing outstanding growth in assets for many years in the form of funds from private donors they control under specific or general guidelines, as well as proportionate growth in charitable giving. They fund many needs in their communities, making it difficult to assist many issues including limited support for our burgeoning elderly population, yet ironically seniors make up a disproportionately larger share of CF donors. Findings from our CF research include the following:

- In reviewing the 100 CF Web sites, 85% listed at least a summary of programs, focus areas or initiatives and a list of grants within the last year to draw the conclusions.
- Only five of 100 CF, or 5%, had a substantial commitment to the Elderly that included a program or initiative dedicated to the elderly. Only four made substantial commitments to senior affordable housing, with 20% making commitments to affordable housing in general.

SC advised senior executives of these CF of these findings, and others in general, as well as of specific findings as to how their CF fared in its commitments to seniors. Approximately 20% responded, with half expressing an interest and concern for expanding senior initiatives. We find

this an encouraging start, and will continue to inform nonprofit providers with the expectation that with our assistance, an alliance with a major provider(s) can lead to new and expanded models to address needs for low-income housing for the elderly, develop Assisted Living type supportive services, and increase the number of nonprofit long term care operators.

PFs have substantially more assets than the CFs. Since CFs received many one-time donations compared to PFs, they have a somewhat higher percentage of charitable giving than PFs. However, that asset to giving differential does not offset the huge amount of assets controlled by PFs compared to CFs. To demonstrate that difference, The Foundation Center has total assets as of the end of 2003 of almost 400 billion dollars for private foundations, while community foundations has assets of slightly more than 34 billion dollars.

The missions of PFs vary substantially when compared to CFs, with one primary difference the lack of geographical boundaries that allow PFs to address third world basic needs of the poor in healthcare and food such as the work of the Bill and Melinda Gates Foundation or the Rockefeller Foundation. These missions are beyond admirable, and all of the top 50 PFs researched provided some support within the US, and a minority were only in the US, sometimes focused on the needs of children like the two large affiliated PFs, the Anne E. Casey Foundation and Casey Family Programs, or are locally focused like the Lilly Endowment, Inc. the fifth largest PFV that supports so much in the Greater Indianapolis area including elderly needs. Among the top 25 PFs, only Lilly and the Harry and Jeanette Weinberg Foundation, Inc. committed resources aimed at the Elderly, and only four more within the top 50 made commitments to the elderly. Several others supported healthcare initiatives, with the fourth largest foundation, the Robert Wood Johnson Foundation, being the only one of the top 25 Foundations to solely focus on health care, yet they exclude all end of life and long term care program assistance which is so needed by the elderly.

Conclusions

As a society swept up in the uncertainty of a world of turmoil, we fail to prioritize the issues of our tomorrows that are also the present day compromised quality of life of today for millions of elderly Americans. We are still a great nation, a nation of compassion, but if we cannot take care of our own, how can we continue to do our best to benefit those beyond our borders? We can do better as individual citizens, and so can our government to support our growing elderly population. Public advocacy is needed, but that is a slow process with inherent conflicts in the lobbying of big business without a senior focus, let alone the needs of many for the government to address, but there are efforts that are worthwhile such as expanding government insured loans for affordable senior housing and the added availability of 9% tax credits.

Another answer is increased collaboration between nonprofit providers and Community Foundations in combination with increased support of Private Foundations such as a 2005 initiative of the James Irvine Foundation. One major initiative with regular substantial funding from a major Private Foundation could lead the way for others to follow, such as a commitment to fund targeted collaborative leveraged senior housing development, increased services to existing senior housing for the poor, increase the too low percentage of nonprofit nursing home operators, and expand intergenerational programs to help the elderly and access the great resources of seniors helping all of us, including children first and foremost.