

# Senior Services Study

December 2014



This report was produced by the Jewish Community Association of Greater Phoenix. The Study was conducted by Janice Friebaum, Senior Services Consultant, and overseen by Lisa Kaplan, JCA Director of Planning and Organization Relations.

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Jewish Community Association of Greater Phoenix



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## **I. Executive Summary**

### **Jewish Community Association of Greater Phoenix Senior Services Task Force Executive Summary**

#### **Introduction**

In 2012 the Board of Directors of the Jewish Community Association allocated funds to study the growing population of Jewish seniors in the greater Phoenix area. Study objectives were to define the size of the population that will require services, what will seniors want, what seniors will need, what we will have resources to provide and what seniors will accept.

In early 2013 a consultant was hired and the study initiated. The study was completed in June 2014. The main goals of the study were to:

- Better understand the current demographics and population trends of the local senior population;
- Assess the range of local services available to Jewish seniors;
- Identify the services that are most needed; and
- Develop recommended actions to address the unmet needs of local Jewish seniors.

#### **Study methodology**

An exhaustive attempt was made to identify existing resources and services for seniors in the Valley of the Sun from both Jewish and non-Jewish service sectors.

Interviews were conducted with service providers, service professionals, rabbis and other relevant agencies.

Focus groups were held in various areas of the Valley. In addition, an online survey was conducted which had responses mainly from seniors but also from family members and members of the general population. Responses from over 1100 individuals were received, analyzed and included in the study.

Federations in multiple areas of the country were queried as to how they have identified and approached similar problems and innovative solutions described.

#### **Study results**

Prior studies and existing resources were reviewed and suggested that in excess of 100,000 Jews currently live in the Valley of the Sun. The suggested demographics were:

68% are living in central or North Phoenix Scottsdale and Paradise Valley

23% of Jews are living in the East Valley

6% of Jews are in the West Valley

The remaining small population is scattered.

Consistent with the country as a whole, the segment of the population greater than age 55 is expanding at a much higher rate than the general population.

A wide variety and impressive number of services for seniors were found in various parts of the Valley. These were much greater than anticipated. However, many services have restrictions related to age, location, ethnicity and other qualifying factors. While a compendium of these services was listed in the study, the list of restrictions was not as well defined.

Cutting edge strategies in cities around the country larger than Phoenix, the same size and smaller were listed and discussed.

### **The task force**

At the request of the JCA board Dick Gottlieb was asked to convene a task force to evaluate the validity and worth of the study and recommend action plans to the Board of Directors. The task force formed included a wide variety of lay professionals from the general community both Jewish and non-Jewish. The task force read the study in depth and met three times.

The task force recommended the study be accepted. In addition, it felt the underlying theme exposed was the need to help seniors “age in place” by providing services that would allow seniors to remain active, healthy and continue to live independently in their communities as long as it is safe.

The task force felt that it would be important for the JCA to consider in any future planning the following principles. First, that the study did not adequately define the client base by numbers in each service area. That The JCA recognize that all needs and solutions to satisfy these needs must be viewed as interrelated. Also, that the JCA consider when crafting solutions, to use the wide variety of existing services. Additionally, the task force felt that the JCA should identify and utilize potential collaborations between services and service providers already existing.

The task force made three specific suggestions to the Board of Directors for implementation at this time and as funds become available:

1. That a compendium of existing services and how to obtain them as well as relevant information be collected including restrictions, qualifications for service and limitations of services provided. The task force felt that an individual knowledgeable in this area needed to be hired to maintain the database and advise and refer people to existing service providers as needed. The task force made no specific recommendation as to whom or what agency would best provide the service.
2. Existing transportation resources were cumbersome for seniors, inadequate and difficult to use and sometimes expensive. There was very little cooperation noted between municipalities. The task force recommended that a solution to this problem be studied, formulated and implemented.

3. That the JCA recognize socialization needs for seniors are under-appreciated especially for seniors who have limited transportation options and or are homebound. An effort needs to be made to augment the availability of existing services for seniors and, where necessary, expand them as needed emphasizing Jewish social cultural and religious activities.

## II. Introduction

The Jewish Community Association of Greater Phoenix (JCA) initiated this Senior Services Study in March, 2013. The main purposes of the Study were to:

- a. Better understand the current demographics and population trends of the local Jewish senior population;
- b. Assess the gamut of local services available to Jewish seniors;
- c. Identify the services that are most needed and those that are insufficient; and
- d. Develop recommended actions to address the unmet needs of local Jewish seniors.

The impetus for the Study was, in part, the notable trend of aging in the overall American Jewish population. Changes in the Jewish population of Greater Phoenix, from 1984 to 2002, also reflect this trend.<sup>1</sup> Although there has been no local Jewish population study since 2002, anecdotal observations have led community leaders and planners to believe the average age of Jews in Greater Phoenix continues to creep upward. To fulfill its mission, to strengthen and sustain a vibrant, inclusive Jewish community, the JCA commissioned this Study to address the imminent needs of Jewish seniors and to stay a step ahead of – *and plan for* – future needs.

Janice Friebaum, a consultant with experience in Jewish community planning and senior services, was commissioned to conduct the Study. Lisa Kaplan, Director of Planning and Organization Relations, supervised the Study's execution.

While there are varying age definitions for "senior," for the purposes of this Study "senior" is defined as 65 years and older.

How to reference, as a group, those who are 65 and older is sometimes a point of contention. The terms elderly, aged, seniors, senior citizens, older adults, and mature adults are all used in academic, funding, service provider and colloquial language. Rationales abound for using one term versus another. For ease of communication in the course of conducting this Study, as well as in preparing this report, many terms for those 65 and older were used. The intention was that these terms are equal in meaning and value, and always invoked with respect.

The accuracy of data and information contained in this Study can only be guaranteed as far as the sources utilized. Additionally, a significant portion of the information obtained and presented in this Study about local senior services providers includes fluid data. Details about timeframes, costs, locations, and sometimes the existence of the provider organizations themselves can change.

Research and information gathering, reported in Section III of this report, comprised the bulk of effort involved with the Study. A Senior Services Task Force was formed by the JCA in 2014 to:

- Evaluate the results of the research and information gathering;

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<sup>1</sup> The 2002 Jewish Community Study of Greater Phoenix, Summary Report, December, 2002, Ukeles Associates, Inc. (UAI).

- Identify the priority unmet needs of Jewish seniors in Greater Phoenix (Section IV); and
- Develop recommended actions to address the unmet needs (Section V).

Task Force members are listed in Appendix 1.

The intent of this report - through examining the local landscape of available senior services, thoughts and perceptions of stakeholders, needs that remain unmet, and possible actions to improve the lives of Jewish seniors - is to guide the JCA in its critical planning and funding allocation decisions.

### **III. Research and Information Gathering**

Identifying the most pressing unmet needs for local Jewish seniors requires determining where there are gaps between the existing service infrastructure and the needs.

To achieve this, the following tasks were undertaken:

- A. Review and analysis of existing relevant demographic data and senior needs assessments
- B. Researching and gathering information on local resources and services available
- C. Compiling the perceptions and opinions of local stakeholders/key informants
- D. Gathering information on innovative and/or highly effective senior services or programs

## **A. Demographic Data and Senior Needs Assessments**

Demographic and population data often serve as the foundation for senior needs studies. Data such as age, household income, household structure (whether or not one lives alone), and the absence of adult children living nearby are strong indicators for social and supportive service needs.

Ample and relatively current demographic and senior needs assessments data exist from national studies. At the state (Arizona) and county (Maricopa) levels, there is also a fair amount of data. Information is spottier for individual cities within Maricopa County. The only cities for which demographic data were reviewed were Scottsdale and Phoenix, where it is believed the majority of Jews reside. Looking specifically at Jewish older adults, recent detailed national data is lacking. Locally, the two most recent Jewish population studies for Greater Phoenix were conducted in 2002 and 1984. In order to gather more information about local needs and demographics the Jewish Community Association conducted an online survey of the Phoenix Jewish Community. Over 1100 people participated in the survey. The information learned in the survey is shared below in its own section within the demographic information section.

### **i. Online Senior Services Survey**

A senior services survey was made available online, via the JCA website, from June 1–30, 2014. The survey was advertised in the Jewish News of Greater Phoenix as well as via email messages from the JCA and many of its funding partners. Responses were received from 1,130 individuals, of which 95% were Baby Boomers and seniors. The survey questions are listed in Appendix 7 and details of the responses are found in Appendix 8. A general summary of the survey results is reported below.

More than 75% of the survey respondents reside in Scottsdale (44%), Phoenix (29%), or Paradise Valley (3.5%); the balance resides in the East Valley (17%) and West Valley (6%). An incidental number of respondents reside in outlying areas such as Fountain Hills, Anthem, Cave Creek, and Maricopa.

The most concentrated response rates came from three central Scottsdale zip code areas, 85254 (8%), 85258 (8%) and 85260 (6.5%), and one north Scottsdale zip code area, 85255 (8%).

The age group with the highest response rate (41%) was from “younger” seniors, ages 65-74. The majority of respondents was female (69%), married (62%), and live with a spouse, partner or significant other (62%). Almost half (49%) of the respondents are fully retired. The vast majority (82%) reports having adult children. Of those with adult children, 59% have at least one child who resides locally.

Current caregiving responsibilities were reported by 18% of the respondents. Of those who reported being caregivers, 56% care for adult parents and 26% care for a spouse, partner or significant other. Almost half (45%) of the respondents believe they will become (or continue being) a caregiver in the near future. Most of these respondents (61%) believe they will be caring for a spouse, partner or significant other.

When asked about the best method to receive information about senior services or programs, the top four responses were email, US mail, internet (websites), and newspapers.

When asked about services currently utilized or ones that may be utilized in the near future (respondents could select up to five), responses were (in order of highest numbers):

1. Cultural events (62%)
2. Social activities (60%)
3. Health, wellness and exercise programs (55%)
4. Recreational activities (50%)
5. In-home supportive services (30%)
6. Transportation (25%)
7. Senior housing (24%)
8. Social services supports (19%)
9. Respite care (11%)
10. Adult day health programs (8%)
11. Low-income senior housing (6%)

Asked which services for seniors are most important for the Jewish community to address now, responses were (in order of highest numbers):

1. Information and referral (57%)
2. Socialization programs (56%)
3. Transportation (54%)
4. In-home supportive services (50%)
5. Jewish senior housing options (43%)
6. Senior/community centers with quality programming (41%)
7. Affordable senior housing (37%)
8. Health and wellness programs (30%)
9. Case management (23%)
10. Adult day health programs and caregiver respite (21%)
11. Adult education (21%)
12. Counseling and support groups (19%)

The survey concluded by asking for any additional thoughts or comments on how the Phoenix Jewish community can best meet the needs of its seniors. Most comments received fell into one of the following general categories (for more details see Appendix 8):

- Transportation
  - providing rides at night, to synagogues, JCCs and other community events
  - lacking options in the NW Valley and north of the 101 in Scottsdale
- Jewish senior housing - CCRCs, assisted living, groups homes, skilled nursing facilities
  - Location of Kivel Campus of Care is not relevant to current Jewish demographics
  - Should be located in East and Northeast Valleys, and in Scottsdale

- Need facilities with kosher meals
- Need affordable or subsidized housing
- Need high-end housing
- Need high quality assisted living and skilled nursing facilities
- Need senior residences connected to senior/community centers or universities
- Need group homes for adults with special challenges
- Geographic programming issues
  - Services and programs lacking in West and East Valleys
  - Scottsdale JCC is the hub for most Jewish programming and is too far for many seniors
- Kosher food
  - Needs to be available and affordable
- Adult day health programs
  - Need to address early to mid-stage Alzheimer’s disease
  - Need to serve people with physical – and not just cognitive - impairments
- Vulnerable and needy older adults
  - Financial assistance
  - Advocacy for those without local family
- Affordable in-home services
  - Volunteers should make home visits
- JCCs
  - Valley of Sun JCC
    - needs more and better older adult programming, including counseling and support groups
    - Needs to provide adult day health programs
    - Needs to adjust membership and program fees for low-income older adults
  - East Valley JCC does not need a Holocaust museum; instead it should raise funds to provide traditional services and amenities such as a gym, pool, tennis courts, etc.
- Information and referral
  - Need “one-stop” service for information
  - Need an accurate and up-to-date resource guide
  - Need to educate community about available services
- Caregivers need more resources
- Synagogues
  - Don’t support seniors as well as churches
  - Should offer subsidized memberships to seniors
- Senior programming
  - Create more multigenerational programs
  - Avoid night time scheduling unless adequate transportation can be provided
  - Senior centers need to improve quality of programming
  - Create a community Bikkur Cholim for homebound adults
  - Need educational programs on legal, financial and tax issues for seniors

- Chris Ridge Senior Enrichment Center has had too many funding cuts
- Issues with the JCA
  - Has not sufficiently reached out to seniors
  - Closing Kivel’s skilled nursing facility and ending the senior kosher program was shameful
  - Financial contributions are solicited but there is no follow-up with attention and programming (especially in the NW Valley)
  - Jewish seniors are treated as a lower priority than youth and families
  - Give more funding to Kivel and JFCS and let them take the lead on serving Jewish seniors in Greater Phoenix; they are the experts
  - Do more outreach to seniors living in remote locations, such as Casa Grande, Maricopa, Apache Junction, etc.

**ii. Worldwide**

By 2050, for the first time in human history, seniors 60+ will outnumber children 14 and younger. Those 65+ will comprise 17% of the global population, from 810 million in 2012 to 2 billion in 2050.

Today the average life expectancy for seniors in developed countries is 78. By 2050, it will rise to 83.

**iii. National**

The Numbers

- 65+ population
  - 1900 - 4.1%
  - 2000 - 12.4%
  - 2010 – 13% (40.2 million); 14.2% of white people 65+
  - 2011 - 13.3% (41.4 million)
  - 2030 (projected) - 19.3% (72 million); 20.7% of white people 65+
  - 2050 (projected) - 25% (88.5 million)
  - 2056 (projected) - first time 65+ will outnumber those 18 and older
- 85+ population – the “super-elderly”
  - 2010 – 1.9% (5.8 million)
  - 2030 (projected) – 2.3% (8.7 million)
  - 2050 (projected) – 4.3% (19 million)
- 2011 - Florida led all states with 65+ comprising 17.6% of the population
- 2010 - for 65+ population, 90.5 males for every 100 females
- Older population increasing most rapidly in US West

### Support/Residential Circumstances

- 2012 – 58% of those 65+ were married
- 2012 - 26% of those 65+ were widowed
- 75% of those 65+ have an adult child living within 35 miles
  - distance between parents and adult children is related to age of parent (80+ more likely to live closer to adult children)
- 9 of 10 older adults prefer to remain living in their own homes
- 2000 - 10% of those 65+ resided in assisted living facilities/group homes
- 22% of 85+ will live remainder of their lives in a skilled nursing facility
- greater than 20% seniors do not drive

### Health

- 8 of 10 seniors live with one or more chronic health conditions (50% have 2 or more conditions)
- 25% of older adults are obese
- 20% of older adults have diabetes
- 60% of older adults have arthritis
- 10%+ of all older adults and roughly 50% of those 85+ have some form of dementia
  - Most (80%) with dementia have Alzheimer's Disease (number one cause of institutionalization and likely, though incompletely reported, the most common cause of death second to heart disease and cancer)
  - 2014, 5.2 million Americans have Alzheimer's Disease today
  - By 2050, 16 million Americans will have Alzheimer's Disease
- Substantial increase in use of hospice services over past decade
  - 1999 - 19% of decedents used hospice services during their last month of life
    - 2009 – 43%
  - 1989 - 49% of older adult deaths occurred in hospitals
    - 2009 - 32%
  - 1989 - 15% of older adults died at home
    - 2009 - 24%
- life expectancy of a 65-year-old in 1940 was almost 14 additional years; today it is 20+ years

### Socioeconomics

- 1965 - 24% of older adults were high school graduates and 5% college graduates
- 2012 – 81.1% of older adults were high school graduates; 24.3% were college graduates or higher
- 1974 to 2010 – proportion of older adults with:
  - income below poverty level *decreased* (15% to 9%)
  - low income *decreased* (35% to 26%)
  - high income older adults *increased* (18% to 31%)

- 2011 –median income for household with person 65+ was \$33,118
- 2011 – 8.7% of those 65+ lived at or below poverty level
- 2011 – median net worth of householders 65+ was \$170,128
- 2012 – 81.1% of those 65+ owned their own home
- Social Security benefits
  - major source of income for most of the elderly
    - 75% recipients 65+ depend on Social Security for all or most of their monthly income
  - benefits represent about 39% of the income of all elderly combined
  - unmarried elderly women
    - 26% rely completely (100%) on Social Security
    - 42% depend on Social Security for 90% of their income
  - 9 of 10 individuals 65+ older receive benefits
  - Average older adult receiving Social Security benefits gets \$423/month
    - Older women receive ~\$4,000 less/year in benefits than men
- 2013 – economic insecurity
  - greater than 23 million of those 60+ are living at or below 250% of federal poverty level (\$28,725/year for a single person)
  - 51% of the workforce has no private pension coverage
  - 34% of the workforce has no savings set aside specifically for retirement
  - 14% of those 65+ face retirement with negative net worth
  - Millions of older adults are struggling to meet expenses because they are not considered poor (they are above federal poverty level of \$11,490/single elder)

#### Work/Jobs

- Those who are 65+ in the labor force:
  - 1990 – 12.1%
  - 2010 - 16.1%

#### Lesbian, Gay, Bisexual and Transgender (LGBT) Seniors

- Lesbian, Gay, and Bisexual population (all ages) estimated at 3-8% of total US population
- Greater than 3 million LGBT who are 65+; number will double by 2020
- 1 in 10 same-sex couples include someone 65+
- greater than 1 in 4 same-sex couples include someone 55+
- Aging support for LGBTs
  - twice as likely to age as single person
  - twice as likely to live alone
  - 3-4 times less likely to have adult children for support
- Caregiving
  - 36% care for parents
  - 18% care for partners
  - 14% care for friends

- caregivers of LGBTs are more likely to be a friend or “chosen family” than a relative or child
- Mental health and substance abuse issues are more likely

Baby Boomers (born 1946 - 1964)

- Boomers presently turning 65 at a rate of one every 8 seconds
- 2010 - 78 million Baby Boomers
  - 60 million will still be alive by 2030
  - 20 million will still be alive by 2050
- Baby Boomer generation is more racially diverse and better educated than previous generations
- “The 2030 problem” presents a caregiver shortage
  - By 2030, there will be four potential caregivers (age 45-64) for each person 80+, down from a high of seven in 2010
  - By 2050, when boomers are 86-104, the caregiver ratio will drop below 3:1
  - Why?
    - Boomers have fewer children
    - Boomers are most numerous age cohort
    - Boomers are living longer

Caregivers

- 75%+ of adults needing long-term care depend on family/friends for sole source of help
- Presently there are 45-65 million caregivers (for family or friends)
  - Nearly two-thirds are women and greater than 80% of those they care for are people 50+
  - The “average caregiver” today is a 49 year-old woman with some college education who works outside the home and spends ~20 hours/week caring for her mother who lives nearby, without pay
  - 2013 - 39% of adults care for someone with significant health issues (30% in 2010)

**iv. Arizona State**

The Numbers

65+	2012	968,000 (13.9%)	
	2032	1.8 million (19.4%)	(+86% change from 2012)
	2050	2.16 million (19.5%)	(+123% change from 2012)
65-74	2012	528,000 (7.6%)	
	2032	865,000 (9.3%)	(+64% change from 2012)
	2050	833,000 (7.5%)	(+58% change from 2012)

75-84	2012	301,000 (4.3%)	
	2032	648,000 (7.0%)	(+115% change from 2012)
	2050	770,000 (6.9%)	(+156% change from 2012)
85+	2012	140,000 (2.0%)	
	2032	287,000 (3.1%)	(+105% change from 2012)
	2050	559,000 (5.0%)	(+299% change from 2012)

- 2009 - 6.6 million people – all ages (increased by 10.3% from 2005)
  - second fastest population growth in the nation
- Snowbirds inflate the elderly population by almost one-third during winter
  - they are predominately married couples in good health
  - more than two-thirds come from the mid-west
  - one-sixth come from Canada
- By 2020 - 1 in 4 Arizonans (25%) will be 60+ (up from 1 in 6 in 2000)
- Between 2015 and 2030, the 65+ population is projected to increase 101% (highest projected increase in nation)
  - older adult population growth due to
    - continued migration of retirees
    - aging of Baby Boomers
    - longer life expectancies
- Between 2000 and 2020, the 85+ population is projected to increase 102% (faster than any other age group)
- Elderly growing increasingly old (age cohorts growing at dramatically different rates):
  - 1990-2000
    - 33.2% growth for 60-64
    - 25.4% growth for 65-74
    - 55.9% for 75-84
    - 81.8% for 85+
- National rank in percentage of population 65+
  - 2000 - 22nd
  - 2010 – 18<sup>th</sup>
  - 2030 - 14<sup>th</sup> (projected)

#### Support/Residential Circumstances

- large migration of retirees and snowbirds
  - reasonable to assume a lower number of adult children available as caregivers
- number of older adults living alone has increased over past two decades
- 2000 - 25% of those 65+ lived alone (expected to grow as Boomers age)
- 2008 – of those 60+
  - 60% married
  - 22 % widowed

- 13% divorced
- greater than 90% of those 65-74 desire staying in their own homes
- 2010 - 6% of children (106,000) are being raised by grandparents (doubled since 2000)
- grandparents raising grandchildren (under 18)
  - 2000 - 96,000+ (74% increase from 1990; trend expected to continue)

### Health

- 75+ people with significant health care needs
  - projected to grow from 7% of the total population in 2000 to 12% in 2050
- 2011 - greater than 30% of those 60+ have one or more disabilities
- 2005 – for those 75+, the most commonly experienced limitation of daily living is walking, especially outside
- 2005 - estimated that 25% of those 65+ have significant mental or behavioral health problems (e.g. memory disorders, depression, sleep disorders, substance abuse)
- older Arizonans have the highest suicide rate in US
- 2000 - women who reached 65 could expect to live until 84, and men until 81
- 2008 - median age of death was 80 (females) and 73 (males)
- Today, of those 65+, almost 1 in 5 have diabetes
- Alzheimer’s disease in those 65+
  - 2010 - 97,000
  - 2025 – 130,000 (projected)

### Safety

- 2004 - property crimes accounted for 92% of all crimes affecting households headed by persons 65+ (does not include fraud, elder abuse, neglect or financial exploitation)
- estimated 1 in 14 cases of elder abuse are reported to authorities; only 1 in 5 victims receive services
- Typical Adult Protective Services (APS) victim in Arizona is 65+, low income, and lives alone
  - those with some cognitive impairment are especially vulnerable

### Socioeconomics

- 2012 - 85% of older adults received social security (average benefit \$15,300/year)
- Social Security accounted for 49% of typical older adult Arizona family income
  - Low-/middle-income older adults even more reliant on Social Security (71% of income)
- 2011 - 68,000 Arizonans 65+ are below 100% of federal poverty level
- 2005 - 8.4% Arizonans 65+ live below poverty line
- Arizona has lower rate of seniors living below poverty than US (retirement destination for affluent seniors)
- Almost half of retirement age residents moved to Arizona after turning 55

- This cohort is, on average, younger, wealthier, more highly educated, most independent of all retirees, and tend to be non-Hispanic whites

### Work/Jobs

- Number of seniors in labor force:
  - 2000 - 64,200
  - 2009 - 116,200

### Baby Boomers (born 1946 - 1964)

- By 2020 almost 1 in 4 Arizonans will be a Baby Boomer
- Boomers in Arizona follow national trends
  - More educated
  - Have half as many children
  - Expect to have long retirement
  - Have saved relatively little compared with previous generations
- Do not envision retirement like previous generations
  - Particularly interested in flexible work; desire balanced life
  - Retirement as a way to repurpose their skills in meaningful ways, beyond traditional volunteerism
  - Desire “encore careers” - older adults applying their talents, desires and skills to social causes and needs on their own terms
  - Want to be connected to civic engagement opportunities

### Caregivers

- 2005 - 59% of adult population either is or expects to be a family caregiver
- 2009 - 885,000 are family caregivers
  - One-third provide care to an aging parent
  - On average, provide 20 hours care/week
  - Almost 75% are employed at some point while caregiving
    - 70% of those make changes to their work hours, take leave or quit as result of caregiving role
  - Provide almost 80% of the long-term care support needed
- As population ages, fewer family caregivers will be available

### Needs Assessments/Community Input

From Aging 2020: Arizona’s Plan for an Aging Population, August 2005 – *community input*

- Understanding and navigating Arizona’s long-term care system is difficult/overwhelming
- Need for one-stop resource center for seniors and families, especially for transportation, health care and financing options

- Affordability of services is important; provide sliding scales and other financing help
- Bring services to community rather than make older adults go to the services

From Governor's Advisory Council on Aging 2013 Senior Action Day

Top Issues of Concern - *Input from Seniors*

- #1 – availability and cost of aging in place/long-term services and supports
- #2 - availability of transportation options/transportation
- #3 – access to information and resources/lack of knowledge - how to look for help
- #4 - fraud, scams, abuse, or neglect
- #5 – health
- #6 – mobility management
- #7 – social connectedness (versus isolation)
- #8 – access to health services providers
- #8 – funding for transportation options
- #8 – respite/support for caregivers
- #8 – basic needs (money, food, shelter, etc.)

From Governor's Advisory Council on Aging 2013

Top Issues of Concern to Seniors - *Input from Stakeholders*

- #1 – cost of health care
- #2 – availability and cost of aging in place/available long-term services and supports
- #3 – financial sustainability: “Will I outlast my money?”
- #4 – access to health services/providers
- #5 – health
- #6 – transportation
- #7 – social connectedness (versus isolation)
- #8 – basic needs (money, food, shelter, etc.)
- #8 – lack of knowledge – how to look for help

**v. Maricopa County**

- 4<sup>th</sup> among nation's counties in population; approximately 4 million
- Arizona's most populous county (60% of state's population)
- One of largest counties in US (area): 9,200 square miles
- One of fastest growing counties in nation, especially West Valley (Surprise, Goodyear, Buckeye)
- Greater Phoenix region expected to add 2.2 million between 2010 – 2030
- Sunbelt destination for snowbirds and retirees

The Numbers

- 2012 - 3,942,169 total population (compared with state population of 6,551,149)
  - 3.3% increase from 2010 (3,817,117)
  - 25% increase from 2000 (3,072,149)
- Median age is 37.4 for total population; median age for 60+ is 69.5
- Percentage of those 65+ of total county population:
  - 2000 – 11.68%
  - 2010 – 12.12%
  - 2025 – 25% (projected)
- 2010 – 85+ was fastest growing segment of county’s older adult population
- 2000 – Maricopa County cities with high median ages and high percentages of people 60+:

<u>City</u>	<u>Median Age</u>	<u>% of 60+ Residents</u>
Carefree	55.2	38.9%
Fountain Hills	46.4	26.3%
Litchfield Park	44.7	27.8%
Paradise Valley	46.3	29%
Scottsdale	41	22.1 %
Sun City	75	89%
Sun City West	73.2	92.3 %
Sun Lakes	69.3	80.4%
Surprise	46.1	34.7%
Youngtown	65.3	65.3%

Support/Residential Circumstances

- 2010 – nearly 25% of all older adults in county live alone
- 2012 – 60+ county residents:
  - 57.7% married
  - 21% widowed
  - 40.1% live alone
  - 5.4% live with grandchildren
  - 1.6% responsible for grandchildren
  - 78.5% live in owner-occupied housing

Health

- 2020 (projected) - 80,638 older adults will have Alzheimer’s disease
- 2012 - 31.2% not living in an institution have a disability (of any kind)

Socioeconomics

- 2012 – of those 60+, 9.8% live below 100% of poverty level

Needs Assessments/Community Input

From the Maricopa Associated Governments (MAG)/ETC Institute, "Municipal Aging Services Inventory," *survey of 55+ residents* to determine service priorities in Maricopa County, 2012

- 59% of those 55-59 are not satisfied with opportunities to meet peers
- Almost 75% of those 55-90 do not use indoor public or nonprofit facilities (83.6% for those 55-59)
- 73% do not go to senior centers
- Top concerns include
  - affordable health care
  - outliving financial resources (Baby Boomers and young seniors most concerned)
  - losing the ability to drive
  - inability to continue living at home
- Survey respondents' top funding priorities to improve services
  - health care
  - social services
  - public transportation
  - financial support
- Almost half of those surveyed cited lack of awareness (of services) as the reason preventing them from using older adult services
- Mode of transportation used
  - Car (personally drive) – 89%
  - Walk - 27%
  - Carpool - 24%
- Services and activities most often used
  - Public parks and trails - 46%
  - Active recreation opportunities -29%
  - Arts and cultural amenities - 26%
  - Volunteer opportunities - 14%
  - Public transportation - 14%
  - Senior centers - 12%

From MAG's 2011-2012 Municipal Aging Services Project  
*Interviews with older adults and service providers*

- Transportation and socialization emerged as the most important needs
  - transportation needs to be safe, dependable, unrestricted and affordable
  - more senior centers are needed throughout Valley, with
    - transportation options
    - accommodations for different levels of mental/physical abilities
    - longer hours (later in day, evenings, weekends)

Thoughts of *providers and case managers* about people 60+:

- Services not being adequately received
  - #1 – dental care
  - #2 – door-to-door transportation
  - #3 - financial assistance
  - #4 – housekeeping services/home maintenance help
- Services that will be most needed over next 5 years
  - #1 – door-to-door transportation
  - #2 – dental care
  - #2 – financial assistance
  - #3 – meals or meal preparation assistance
  - #4 – housekeeping services/home maintenance help

Thoughts of *congregational nurses and social workers* about people 60+:

- Services not being adequately received
  - #1 - Door-to-door transportation
  - #2 – behavioral health counseling
  - #3 - dental care
  - #4 – meals or meal preparation assistance
  - #5 – housekeeping services/home maintenance
  - #6 – legal services
- Services that will be most needed over next 5 years
  - #1 - behavioral health counseling
  - #2 - housekeeping services/home maintenance
  - #3 – door-to-door transportation
  - #3 – financial assistance
  - #4 – meals or meal preparation assistance
  - #4 – medication management
  - #5 – dental care
  - #5 – personal protection (abuse, scams, exploitation, safety)

Thoughts of the *general public* about people 60+:

- Services not being adequately received
  - #1 - housekeeping services/home maintenance
  - #2 - door-to-door transportation
  - #3 - meals or meal preparation assistance
- Services that will be most needed over next 5 years
  - #1 - meals or meal preparation assistance
  - #2 - door-to-door transportation

- #3 - housekeeping services/home maintenance
- #3 – social interaction

Thoughts of *elderly/caregiver support group* about people 60+:

- Services not being adequately received
  - Caregiver respite
  - Social interaction for person receiving care
  - Managing doctor appointments
- Services that will be most needed over next 5 years
  - Transportation, especially with wheelchairs (paratransit)
  - System to evaluate assisted living homes
  - Education about care facilities and what one needs to know
  - Live person to dispense information on services
  - Reliable person to do home repairs

Thoughts of *South Phoenix Revitalization Group* about people 60+:

- Services not being adequately received
  - Information on services
  - Senior centers need to have more information on services
  - Services for families on weekends and evenings
- Services that will be most needed over next 5 years
  - Help with understanding technology and devices
  - Financial assistance with utility bills, transportation, food
  - Local transportation and delivery services for grocery shopping
  - Home repair services
  - Assistance to grandparents raising grandchildren
  - Financial assistance with eyeglasses, hearing aids, dental services
  - Job opportunities for older workers

Thoughts of *Alzheimer's/Caregiver Support Group/Alzheimer's Association and R&R Respite* about people 60+:

- Services not adequately being received
  - Socialization
  - Home repairs
  - Assistance for long-distance caregivers
- Services that will be most needed over next 5 years
  - Stimulating activities for “young old” and “old old”
  - Free tech services to help with electronic devices
  - Counseling
  - Safety checks for elderly, those living alone and caregivers
  - Education on caregiving topics

- Transportation

From 2008 Maricopa County Adult Survey on Volunteerism and Career Changes

- Respondents still working did not anticipate full retirement until age 69
- Current economics a big motivator to continue working past 65 (compared with the joy of working)
- 54% believe retirement is a time to begin a new chapter of being active and involved (significantly lower percentage of low income respondents believe this)
- 36% believe retirement is a time to relax and enjoy (significantly higher percentage of low income respondents believe this)
- Volunteer work is the most attractive activity for retirement (also appealing is returning to school to take courses of personal interest)
- 41% find the human services field most appealing for volunteer work

**vi. Scottsdale**

- 6th largest city in Arizona; 94th largest in the U.S.

The Numbers

- 2013 - 219,713 total population (1990 – 130,069)
- 90% of population is non-Hispanic white
- Median age is 46.4
- 2010 – largest percentage (20%) of people 65+ for US cities with a population of 100,000+ (national average was 13%)
- greater than 40% of the population is 50+

Socioeconomics

- 2013
  - 82% in owner-occupied housing
  - Educational level:
    - 23% graduate or professional degree
    - 29% bachelor's degree
    - 29% associate's degree/some college
    - 17% high school graduate
    - 3% less than high school
  - Annual household income
    - 10% greater than \$200,000
    - 21% \$100,000 - \$199,999
  - Median household income: \$65,020

- Average household income: \$98,442
- Median house value: \$430,500

**vii. Phoenix**

The Numbers

- 2012 - 1,488,750 total population
  - Most populous state capitol in the U.S
  - 6<sup>th</sup> most populous city in the U.S.
- 2010 - 65+ comprised 8.4% of population (462,000), compared with 13.8% statewide
- 2020 (projected) - 65+ expected to increase to greater than 700,000

Support/Residential Circumstances

- One-third of households with at least one resident 60+ is a senior living alone
- 35,000 households have a grandchild living with a grandparent
- 13,977 grandparents shoulder financial responsibility for grandchildren

Socioeconomics

- 2010 - 7.1% of older adults live below poverty line

Work/Jobs

- 2010 - older adult employment
  - greater than 41% of the 55+ population is employed
    - 62.5% of people 55-64
    - 26.7% of people 65-74
    - 6.8% of people 75+

**viii. Jewish Data**

From “American Jewish Population Estimates: 2012,” Brandeis University Steinhardt Social Research Institute

- 6.8 million – US Jewish population (includes those who self-identify by religion or other criteria)
- 24% (greater than 1 million) are 65+ (of those who self-identify as Jewish by religion)
- 52% of Jews 65+ are college graduates
  - compared with 24% of US adults who are 65+

From the National Jewish Population Study 2000-2001

- Percentage of 65+ in the Jewish population has increased:
  - 1990 - 17%

- 2000 – 19% (considerably more Jews 65+ than in the total U.S. population (12%))
- 9% of Jewish population is 75+ (compared to 6% of the total US population)

From the Berman Institute’s North American Jewish Data Bank, “Comparisons of Jewish Communities – A Compendium of Tables and Bar Charts, Comparison Series: Section 25, Social Service Needs of the Elderly,” June 2013

Data from the National Jewish Population Study 2000-2001 and local Jewish community studies (conducted at different times) from around the country were compared. Below are selected community comparisons from the “Comparisons of Jewish Communities” document. The information presented below has been selectively excerpted (from available data) to enable comparisons with nearby or somewhat similar Jewish communities. Data utilized to make these comparisons came from the following sources:

- the Greater Phoenix Jewish Community Study, and/or
- other Jewish communities with similarities to the Greater Phoenix Jewish community
  - San Diego (2003 study)
  - Tucson (2002 study)
  - Las Vegas (2005 study)
  - South Palm Beach (2005 study)
  - West Palm Beach (2005 study)
- Phoenix is well below the national average of elderly Jews who live alone
  - 65+            National – 33% Phoenix – 12% Tucson – 27% San Diego – 20%
  - 75+            National – 39% Phoenix – 14% Tucson – 35% San Diego – 27%
- Needed in-home health care in the past year (of Jewish households with person 65+)
  - National – 15.4% Tucson – 13.1% Las Vegas – 10.9%
- Needed senior transportation in the past year (of Jewish households with person 65+)
  - Las Vegas – 11.9%
- Needed home-delivered meals in the past year (of Jewish households with person 65+)
  - Las Vegas – 1.8%
- Needed adult day care in the past year (of Jewish households with person 65+)
  - Tucson – 2.3% Las Vegas – 1.3%
- Jewish households that needed help coordinating services for an elderly person in past year
  - Phoenix – 20% Tucson – 13.8%
- Caregiver households (of Jewish households in which respondent is 40+)
  - Tucson – 10% Las Vegas – 7%
- Households with a 75+ person with local adult children (of Jewish households with person 75+)
  - Tucson – 51% Las Vegas – 40% South Palm Beach – 21%
  - West Palm Beach – 16%
- Preference for Jewish-sponsored adult day care facilities (of Jewish respondents 40+)

- Tucson – 43%      Las Vegas – 40%

From “The 2002 Greater Phoenix Jewish Community Study,” commissioned by the Jewish Federation of Greater Phoenix in December 2002. It is the best and most current source of data on the local older adult Jewish population. Highlights include:

#### General

- 83,000 Jews in 44,000 households (4% of total Greater Phoenix households)
- 138% population increase since 1984
  - out-paced Greater Phoenix general population growth (78% increase)
- Distribution of the Jewish population
  - NE Valley – 41% (Scottsdale, Paradise Valley, Fountain Hills, Cave Creek, Carefree)
  - Phoenix – 30%
  - Northwest Valley - 13% (Glendale, Peoria, Sun Cities, ASU West)
  - Tri-Cities - 16% (Mesa, Tempe, Chandler, Gilbert, Ahwatukee, Sun Lakes, Ocotillo)
- Only 7% were born in Greater Phoenix
- 42% moved to Phoenix in the last 10 years
- Central/North Phoenix is the most stable (long-term residency)
- Greater Phoenix Jewish community is wealthier than most other Jewish communities in the Western US, with average annual household incomes:
  - Greater Phoenix – 36% is greater than \$100,000
  - Western US – 23% is greater than \$100,000
- Tri-Cities households reported the highest annual incomes:
  - 49% greater than \$100,000
  - 6% <\$25,000
- Northwest Valley households reported the lowest annual incomes:
  - 12% greater than \$100,000
  - 32% <\$25,000
- Percentage who said being part of Greater Phoenix Jewish Community is very Important:
  - Northwest Valley – 36%
  - Phoenix – 32%
  - Northeast Valley – 23%
  - Tri-Cities – 17%

#### Older Adults

- Percentage of Jewish population 65+ (in Jewish households)
  - 1984 - 12%
  - 2002 - 20%
    - Children 18 and younger also comprised 20% of Jewish population

- Older adult age cohorts:
  - 1984 - 65-74 was three times greater than the 75+ group
  - 2002 - 65-74 was two times less than the 75+ group
    - 75+ cohort was 12% of total Jewish population
- Tri-Cities area is exceptionally young (4% were 65+)
- Northwest Valley had the highest percentage of those 65+ (40%)
- Annual household income of those 65+:
  - 26% <\$25,000
  - 20% greater than \$100,000
- 13% of those 65+ live alone and, of those:
  - almost 70% are 75+
  - almost half have no adult child living in Greater Phoenix
- 6% of all Phoenix Jewish households are seniors living alone
  - 2% is between 65 -74
  - 4% is 75+

	<b>Ages 65-74</b>	<b>Ages 75+</b>
<b>Estimated number</b> of seniors living in Jewish households	8,300	13,000
<b>Estimated number</b> of seniors living alone	800	1,900
<b>Estimated number</b> living alone without an adult child in Phoenix	400	850
<b>Percentage</b> of seniors in age grouping who live alone	10%	15%
<b>Percentage</b> of seniors in age grouping who live alone and do not have an adult child living in Greater Phoenix	5%	7%

- 20% of households needed assistance for an elderly relative in the past year
  - 56% of those felt it was difficult to obtain assistance
- Percentage who say it is "very important" for Jewish community to have programs/assistance for
  - Frail elderly – 80%
  - Jewish widows and widowers – 59%
  - Active seniors – 52%
- 65+ had highest percentage (40%) of all age groups who donated to the Jewish Federation of Greater Phoenix

ix. Summary and Highlights

Worldwide, national, state, county, and local trends all reveal current and projected future dramatic increases in the numbers and proportions of older adults. The data for Jewish older adults – nationally and locally – follow suit to an even greater degree: *the Jewish population is aging faster than the general population (the percentage of those 65 and older is increasing faster).*

Direct statistical comparisons between national, state, local and Jewish data are extremely difficult. There are typically differences in data collection methodology, the point in time (year) research was conducted, and numerous permutations to how data are categorized and questions are asked. In spite of this, it is possible to compare the following data for useful effect.

Percentage of those 65+

National - 13.3% (2011)

Arizona – 13.9% (2012)

Maricopa County – 12.1% (2010)

Scottsdale – 20% (2010)

Phoenix – 8.4% (2010)

Jewish National – 24% (2012)

*Jewish Greater Phoenix – 20% (2002)*

*Phoenix – 19%*

*Northeast Valley – 23%*

*Northwest Valley – 40%*

*Tri-Cities - 4%*

For the Jewish community and its organizations concerned with meeting the needs of Jewish older adults in Greater Phoenix, the following issues emerge from the demographic data and needs assessments reviewed.

- Numbers – Services are needed for current and projected large numbers of Jewish older adults, including:
  - The increasing proportion of the “super-elderly,” those 85+
  - Baby Boomers entering their senior years
- Geographic “hot spots” – Particular consideration should be given to the following areas:
  - Northeast Valley (specifically Scottsdale and Paradise Valley) and Phoenix (central and north); these areas had the greatest number of Jews in 2002
  - Carefree, all Sun City communities, Sun Lakes, Surprise and Youngtown; these areas had very high percentages older adults, Jewish and non-Jewish

- Scottsdale, Fountain Hills, Paradise Valley and Litchfield Park; these areas have notable older mean ages
  - Northwest Valley, which includes the Sun Cities; these areas had the highest percentage of people 65+ and the lowest annual income of all Jews in Greater Phoenix
- Baby Boomers - Needs and desires are different from previous generations of older adults and will require new approaches to providing services. Boomers:
  - Have fewer children available to provide caregiving support
  - Are more highly educated and desire meaningful community engagement in their senior years
  - Have not saved as much money for retirement compared with previous generations
- Caregivers and Support for Older Adults:
  - Family and professional caregivers available will not keep pace with the number of older adults needing supportive services
  - A significant number of Jewish older adults do not have an adult child living locally
  - As most older adults wish to remain living in their own homes as long as possible, support for caregivers (who make aging in place possible) is critical
- Significant migration of Jews to Arizona, either permanently or as snowbirds (from other regions of the country), at the time of retirement can mean:
  - Fewer local adult children available as caregivers
  - Fewer dependable or stable social connections
  - More affluent, on average, than other retirees in the US
- Many local Jewish seniors live alone (particularly older seniors) and have no adult child living in Greater Phoenix, making them more likely to experience additional challenges as they age and decline
- In general, Lesbian, Gay, Bisexual and Transgender older adults are more vulnerable and experience additional challenges as they age and decline
- The high incidence of dementia (particularly Alzheimer's disease), arthritis, and diabetes warrant extra attention when considering services for older adults
- Utilization of hospice care has increased markedly in recent decades, indicating a need to ensure adequate service delivery for Jewish older adults

- Senior needs studies and assessments conducted nationally, in Arizona, and in Maricopa County highlight common perceptions:
  - Older adults often don't know where to turn for assistance (lack of knowledge) and understanding the system of care and services is difficult
  - Financial sustainability is a concern for many older adults ("Will I outlive my resources?"), as is cost for many services (dental care is often cited as a critical unmet need for this reason)
  - Extremely important needs are
    - Accessible (including door-to-door) and affordable transportation
    - Supportive services to continue living at home
    - Social interaction
    - Financial assistance
    - Caregiver respite
    - Enticing and meaningful social and community engagement for Baby Boomers and young seniors, as well as for the "older old"
  - The vast majority of Jews in Greater Phoenix (in 2002) believed providing services for the frail elderly was very important. Also viewed as very important (though to a lesser degree) were services for Jewish widows and widowers as well as active seniors.

x. **FOOTNOTES: POPULATION, DEMOGRAPHIC DATA AND SENIOR NEEDS ASSESSMENTS**

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## **B. Landscape of Local Senior Services**

The array of services researched for this Study includes those that are supportive, social, educational and recreational.

Providers of these services are grouped into one of the following categories:

- Jewish organizations
- Governmental agencies
- Nonprofit organizations
- For-profit providers (categories of services only)
- Synagogues and Jewish congregations

The service area deemed “local” for the purposes of this Study includes all of Maricopa County with the exception of the following jurisdictions: Wickenburg, Buckeye, Gila Bend, Goodyear, Litchfield Park, New River, and Tolleson. The 2002 Jewish Population Study data for Greater Phoenix and recent anecdotal observations indicate that while the Jewish population is notably denser in certain areas of Greater Phoenix, it is also fairly well dispersed throughout the region.

Even with the elimination of some jurisdictions (listed above), the geographic area covered in this Study remains extensive (Maricopa County is the fourth largest county in the U.S.). Consequently, it would be nearly impossible to research and report on all service providers in this area. The intention, therefore, was to focus on the larger, more well-known, unique and/or most geographically relevant providers.

### Methodology

A variety of methods was utilized to gather information about local providers of senior services:

- In-person meetings/on-site visits
- Questionnaires
- Telephone conversations
- Email communications
- Internet research

In-person meetings were conducted with every local Jewish organization that provides services to seniors. For non-Jewish nonprofit and governmental service providers from whom information was sought, considerable effort was made to meet in-person with those deemed “key providers.” Appendix 2 lists the agencies and organizations with whom in-person meetings and site visits were conducted. Appendix 3 lists the Jewish congregational leaders interviewed.

As it was not possible to meet with all service providers in the Study area, a questionnaire was developed (see Appendix 4) and emailed to 99 organizations/programs serving seniors. After issuing reminder emails and making phone calls to encourage completion of the questionnaire, the final response rate was 28%. Almost all providers who returned questionnaires are included in this section of the report.

Telephone and email interviews were occasionally utilized in place of in-person interviews or completed questionnaires. Internet research supplemented the material gleaned for nearly all service providers mentioned and, for a few, served as the sole source of information.

i. **JEWISH ORGANIZATIONS**

Jewish Family & Children's Service  
Jewish Family Home Care of Arizona (under the auspices of JFCS)  
Kivel Campus of Care  
The Retreat (under the auspices of Kivel)  
Valley of the Sun Jewish Community Center  
East Valley Jewish Community Center  
Bureau of Jewish Education  
Jewish Free Loan  
Smile on Seniors  
Phoenix Holocaust Survivors' Association  
Jewish War Veterans  
Jewish social clubs  
    Sun City Grand Shalom Club  
    Jewish Social Connection  
    Jewish Singles Group of the Sun Cities  
    Pebble Creek Shalom Club

**Jewish Family & Children's Service (JFCS)**

JFCS is a non-sectarian organization that provides behavioral health and social services to families, adults and children of all ages throughout Maricopa County. Their Jewish Community and Older Adult Services programs provide the following services.

**Case Management and Counseling**

JFCS provides comprehensive counseling and case management, advocacy and referral to appropriate resources to help Jewish older adults, 65+ (and the disabled) strengthen their support systems, improve emotional health and develop community connections. This service is critical to helping many seniors live independently. Services are provided in clients' homes or at the offices of JFCS. Bereavement support is provided in two locations in the Sun Cities area, including a support group that meets weekly. Approximately 300 Jewish clients are served in this program; two-thirds are female, 85% live alone, about half are 75-84 years old, 80% are low or middle-low income and in fair or poor health, and most reside in Phoenix, Scottsdale and the Sun Cities area. There is no fee for this service.

**Helping Hands**

This is JFCS' emergency assistance fund to provide short-term financial assistance to Jewish individuals or families who are otherwise unable to meet their basic needs (based on an income and expenses evaluation). An average of 25 families are served by this program each year; including slightly more women than men, 90% live alone and at or below the poverty level, almost all are in fair or poor health, and clients generally reside in the East Valley, Phoenix, Glendale, Peoria and the Northwest Valley, the Sun Cities and Surprise area, and South

Scottsdale. This program is unusual in its ability to provide financial assistance for a broad array of needs and there is no fee to clients for this service.

#### Holiday Programs

Services include free tickets to seniors for High Holiday services at area synagogues, gifts, groceries, meal delivery and gift cards on holidays such as Thanksgiving, Chanukah, and Passover. Approximately 100 Jewish seniors, already clients of JFCS, receive one or more of these free services; 80% are female, most live alone and are low or middle-low income, and most live in the West Valley, Northwest Valley, Central Phoenix or South Scottsdale.

#### Information and Referral

Most requests for information and referrals are received by telephone and email. Approximately 600-1,000 seniors contact JFCS each year for this kind of assistance; almost all are Jewish; most live alone; 80% are female and over the age of 75; 75% are in fair or poor health; and they are of every income level and reside throughout the metropolitan area. There is no fee for this service.

#### Holocaust Survivor Services

JFCS provides Holocaust survivors throughout Arizona with emergency financial assistance and help with securing and managing war reparations. JFCS also facilitates applications for The Blue Card (direct financial assistance for needy Holocaust survivors through a non-profit organization by the same name). Approximately 10 survivors are served in this program; 80% are female, live alone, and are over 85; and all are in fair or poor health. There are no fees for these services.

JFCS, in partnership with the Phoenix Holocaust Survivors' Association (described later in this section of the report) and its subsidiary group Generations After, recently launched *Care Across Generations (CAG)*, a pilot program to provide comfort and assistance to survivors. Volunteers provide friendly visits, phone calls, assistance with shopping, transportation, using a computer, paperwork, etc. CAG recruits and trains adult children and grandchildren of Holocaust survivors to serve as volunteers. The unique concept of the program is to pair survivors in need with descendants of survivors so that this inter-generational connection may bring special comfort to all involved. Non-descendant Jewish volunteers are welcome to participate as well.

Participating organizations, with whom CAG volunteers may sign on, include Benevilla, Duet, Hospice of the Valley and Smile on Seniors (descriptions of each organization are included later in this section of the report).

#### Hospital Chaplaincy

Spiritual care and support is provided to Jewish patients and their families in 22 metropolitan Phoenix area hospitals. Two part-time rabbis serve patients who are not affiliated with a

specific Jewish congregation. They proactively seek out patients and respond when “on-call” and for emergencies.

#### The Center for Senior Enrichment at Chris Ridge

Located at Chris Ridge Senior Living Community in Central Phoenix, JFCS operates the only Jewish senior center in the Phoenix metropolitan area. The Center offers seniors 60+ (and those who are physically or developmentally disabled) educational, health and wellness, holiday and Shabbat programs, as well as recreation, exercise classes, entertainment, cultural outings, and lunches (kosher meals available). Due to its location at a senior residential facility, Center participants may avail themselves of the on-site rooms for exercise, arts and crafts, cinema, and games, as well as the swimming pool.

Approximately 275 people are served at the Center; 80% are female and 75+; 95% are Jewish; most are middle-low to middle income and in good to fair health; and almost all come from the central or north Phoenix area. Although many Center participants are residents of the Chris Ridge Senior Living Community, many also live elsewhere and arrive at the Center utilizing Phoenix Dial-A-Ride or taxi voucher services, a van service administered by the Senior Companion Program of Area Agency on Aging (AAA) and Northern Arizona University (NAU), or drive themselves. The AAA/NAU van will also drive seniors to doctor appointments within a specified geographic catchment area. All programs and services are free except for meals. Lunches are \$4 and holiday meals are \$8.

#### **Jewish Family Home Care of Arizona**

Operated under the auspices of JFCS, Jewish Family Home Care is a private pay program that provides personalized, non-medical in-home care services for the Jewish community and the community at large. Services include an initial consultation and comprehensive needs assessment, as well as referral to and coordination of additional services. Personal care aides provide personal care, meal preparation, transportation, companionship, housekeeping, shopping and errands, respite for family caregivers, and fall prevention education.

Jewish Family Home Care was launched in November 2010 and presently has approximately 25 clients; 75% are female and half are 85+, 90% are Jewish, most are middle to high income, and 65% reside in Scottsdale. Fees for personal care aides range from \$18-\$21/hour with a minimum four-hour shift. Transportation services do not require an hourly minimum. There are flat fees for 24-hour care on a weekly or monthly basis.

#### **Kivel Campus of Care**

Kivel is the only Jewish senior residential facility in Greater Phoenix. Located in central Phoenix, Kivel provides 210 independent living and 45 assisted living apartments for low-income seniors (62+) and/or mobility impaired adults (residents must meet the federal government H.U.D. Section 202 senior housing criteria). After detailed calculations of residents’ incomes and expenses, they pay a percentage of their income for monthly rent and HUD subsidizes the remainder.

There are three separate buildings on Kivel's campus. Independent and assisted living residents can choose between studio and one-bedroom apartments. Assisted living residents are provided with three kosher meals per day whereas independent living residents, for an additional fee, are offered an optional kosher meal plan (one meal/day). All residents are provided with weekly housekeeping services and a 24-hour emergency call system, and all can participate in a full slate of social and recreational programs well as exercise and health classes, and use Kivel's library and computer resources (some recreational events require extra fees). A social services coordinator is on staff to assist all residents. Kivel employs a part-time rabbi who provides chaplaincy and Jewish religious services on the Sabbath and on all Jewish holidays.

Assisted living residents can receive medication management services, bathing and dressing assistance, and laundry service. Residents pay for these additional services either through Arizona Long-Term Care System (ALTCs)/ Medicaid or private pay.

Kivel has one mini-bus and one van, each with a 10-person capacity, that provide residents with transportation for recreational or shopping purposes. For medical appointments residents utilize municipal transportation, such as Dial-A-Ride, or cabs. Approximately 15% of independent living residents have their own vehicles.

A new memory-care unit was added to the assisted living area in December 2012 to provide secure areas with appropriate services and amenities for residents with Alzheimer's disease, dementia, and other memory problems. Monthly fees are higher for this level of care.

Independent living residents are predominately female (80%), the average age is 85 and 25-30% are Jewish. The majority is in good or fair health. Assisted living residents are also predominately female (85%), the average age is older than 85, and 50-55% are Jewish. Most are in fair or poor health.

### **The Retreat**

Operated under the auspices of Kivel, The Retreat is a 10-bed assisted living facility located in a residential neighborhood in central Scottsdale. Opened in September, 2012, The Retreat has 8,400 square feet of space, an activity room and library, beauty salon, sitting areas, landscaped patio and backyard. Residents can be visited by the Kivel rabbi, Jewish holidays are celebrated, and kosher food is available upon request. The home provides 24-hour staffing, medication management, entertainment, educational programs, and other social and therapeutic activities.

Most of the current residents are female, half are Jewish, all are over 85, and most are in fair health and use wheelchairs. All residents are middle-high to high income and, depending on the level of care required, monthly rates currently range from \$4,500 - \$5,500.

### **Valley of the Sun Jewish Community Center (VOSJCC)**

Located on the Ina Levine Jewish Community Campus in North Scottsdale, the VOSJCC provides a wide range of educational, cultural, social, fitness and recreational programs for people of all ages and backgrounds.

VOSJCC facilities include an Olympic-sized outdoor pool, cardio-vascular, weight training, flexibility and balance equipment, indoor sport courts, exercise classrooms, sauna/steam room/whirlpool, outdoor sports fields, classrooms for educational programs and recreational activities (such as card playing), and a kosher café. In addition to seniors availing themselves of the physical exercise amenities, the VOSJCC also offers adult programming, including art, crafts, mah jongg, bridge, local excursions, book and current events discussions, and Jewish topics.

Of the seniors who utilize the VOSJCC, 80% or more are Jewish, most are in the age range of 75-85, the majority are women, most are middle to high income are in good health and reside in Scottsdale or Paradise Valley. There is no designated transportation service to bring people to the VOSJCC. Cabs and Dial-A-Ride are recommended to those who need transportation. To utilize the gym and related exercise facilities, a membership fee is required (for seniors 65+: \$52/month single; \$82/month couple). Some adult classes and programs are free but most have fees (VOSJCC membership is not required; anyone can participate). Two free brunches for seniors are offered each year to introduce them to classes and programs at the VOSJCC (50-150 typically attend).

### **East Valley Jewish Community Center (EVJCC)**

Located in the City of Chandler, the EVJCC provides children, families, seniors and community members with a wide range of services and programs. Seniors can attend group exercise classes, educational presentations, cultural events, and field trips and outings. The EVJCC has a multipurpose room and classrooms for hosting classes and events.

The EVJCC offers Terrific Tuesdays, a group for seniors that meets once a week for educational presentations, field trips and socializing. Approximately 100 unduplicated Jewish seniors participate in this program over the course of one year; most are 75-84 years old, low to middle income, and in good to fair health. The EVJCC mini-bus is available to transport people to Terrific Tuesdays events as well as to cultural events at the nearby Chandler Center for the Arts. The JCC also sponsors occasional book discussions in Sun Lakes (a 55+ residential community).

There are no membership fees; programs and services are free or have specific fees. A \$2 donation is requested for participation in Terrific Tuesdays events. Seniors may be required to purchase tickets and cover expenses for outings and field trips.

### **Bureau of Jewish Education of Greater Phoenix (BJE)**

Located on the Ina Levine Jewish Community Campus in Scottsdale, BJE is a center for lifelong Jewish learning for people of all ages and stages of life. In addition to a Jewish Community Library and

Resource Center (with books, DVD's, CD's, and an online catalogue), BJE offers a myriad of school, teen, family and adult learning programs, as well as the Passages lecture series and annual conferences.

Adult Learning classes are held mornings, afternoons and evenings in different locations around the Phoenix Valley. At the Ina Levine JCC in Scottsdale, approximately 225 seniors participate annually; 75% are female, almost all are Jewish, 70% are 65-75, most are middle to upper income, in good health, and the most reside in Scottsdale and Central Phoenix (including an unknown but notable number of "snowbirds, "part-time residents). Adult Learning classes held at the Ina Levine JCC have fees for enrollment. Prices vary (\$30-\$160) depending on number of sessions and length of class times.

Adult Learning classes are also held in the Sun Cities area in collaboration with Temple Beth Shalom and Congregation Beth Emeth (where classes are held), and in Peoria (in the Trilogy residential community). Of the approximately 100 seniors participating in the Sun Cities area, most are female and 75-85 years of age. Class fees are similar to those offered at the Ina Levine JCC. At Trilogy in Peoria, approximately 35 seniors participate; almost all are 65-75, most are middle to upper income and in very good health. Currently there is a fee of \$35 for three sessions.

BJE used to offer the following special programs for seniors: Shabbat program twice each month for Jewish residents of Pueblo Norte, a senior residence in Scottsdale; Grandparents Circle, a class and discussion group for people whose grandchildren are being raised in interfaith homes; and Pieces of Our Past, an inter-generational program held at four different synagogues for Jewish seniors to share their life stories with Jewish children. The latter program is presently proposed for re-invention as Hand-in-Hand: Pieces of Their Past – A Program for Seniors. A major change from its previous incarnation, if the program is funded, it is to have story sharing occur at senior living residences.

The BJE Passages Lecture Series occurs during the winter months when major speakers give presentations on seven Sunday nights at different venues throughout the community. Audiences are largely comprised of seniors. Tickets are \$18/lecture or \$200 for the lecture series.

BJE's annual Women's Symposium is a half-day of presentations at the Ina Levine JCC on a wide-range of topics of interest to Jewish women. The symposium typically attracts 100-150 women, two-thirds of whom are seniors, largely from the Scottsdale area but also from Phoenix, the Sun Cities, and the East Valley. Cost is approximately \$40/person.

The BJE annual Educators' Conference on the Holocaust, held at the Ina Levine JCC, attracts a large number of teachers from all over Arizona. Many local Holocaust survivors (typically 10-12) participate informally as speakers, sitting and sharing information with conference attendees during the conference luncheon.

### **Jewish Free Loan (JFL)**

JFL is the primary agency in Greater Phoenix where anyone in the Jewish community, meeting and agreeing to certain criteria, can turn for interest free loans. This service allows people a fresh start or

gives them the opportunity to bridge a difficult time in their lives in a process respectful of their dignity. JFL makes loans to individuals and families for a wide range of circumstances, including emergency and critical needs (e.g. financial crises, home eviction, loss of utilities, medical/dental issues, abuse/neglect), adoption, starting businesses, job training, buying homes, Jewish identity development, student costs and Jewish burials.

Jewish seniors most often utilize the following loan categories: emergency and immediate critical needs, medical/dental needs, burials, and funerals. Approximately 30 Jewish seniors currently receive assistance from JFL; 50% are female; half are 65-74 and half are 75-84, all are within 150% of the federal poverty level, and reside throughout the Phoenix metropolitan area.

A new JFL loan fund was developed and launched in 2014 specifically to address the needs of seniors: the Senior In-Home and Care Needs Loan Fund. Interest-free loans are available for expenses related to home health aides, safety equipment, home modifications, therapeutic programs and other services that help seniors continue living at home. Loans may also be used to assist with expenses related to relocating one's residence. JFL is currently working on outreach to inform local senior services providers and the Jewish older adult population that the new In-Home and Care Needs Loan Fund is available.

In order to qualify for a JFL loan, all borrowers must meet general as well as specific requirements for certain loan funds. Among the general requirements is that loans have a guarantor (a back-up individual to repay the loan in the event a borrower defaults), and sometimes more than one guarantor (depending on the loan amount). Both borrower and guarantor(s) must be Jewish, reside in Arizona, be at least 18 years of age, and show evidence of ability to repay the loan. There are stipulations about how many loans may be obtained from JFL, in what period of time, and under what conditions. Certain loan criteria are waived for economic crisis situations.

There are maximum amounts of money that may be borrowed for each loan category. Loan repayment schedules depend on the category of loan and amount borrowed.

Applying for a loan involves submitting a "short form," followed by an in-person interview at the JFL office in downtown Phoenix. Final loan approval requires meeting all loan criteria and a consensus of the JFL Board of Directors.

### **Smile on Seniors (SOS)**

SOS is a volunteer-fueled organization dedicated to enriching the lives and meeting the needs of seniors throughout the Phoenix metropolitan area. A variety of services and programs are offered in seniors' homes, at their senior living residential facilities, and at the Chabad Jewish Center in Central Phoenix.

Services received in a senior's home include friendly visits from trained volunteers of all ages, "Tea and Talk" (friendly visits from SOS co-director, Chani Levertov), "Shabbat-in-a-box," "Chicken Soup for the Soul" (meal delivery to those who are ill), and chaplaincy from SOS co-director, Rabbi Levi Levertov. There are approximately 50 seniors currently receiving this service; 75% are female, all are Jewish, 95%

are over the age of 85, most are middle to middle-upper income, most are in fair health, and about one-third reside in a senior residential facility (independent or assisted living). There is no fee for this service.

SOS also brings programs to senior facilities, such as Shabbat services and dinners, Jewish holiday programs, challah baking workshops, discussions and classes with the rabbi, and “It’s Your Birthday” celebrations. Approximately 400 seniors participate in these programs over the course of one year; 80% are female, 90% are Jewish, and the vast majority is over the age of 85. Programming is presently conducted at over 25 different senior residential facilities, largely located in Phoenix, Scottsdale, and Paradise Valley. There is sometimes a fee to facilities for these programs but no fee for the residents.

Shabbat dinner and Jewish holiday programs are offered throughout the year at the Chabad Jewish Center in Central Phoenix. Approximately 250 seniors participate in these programs each year (some are participants of other SOS programs and services); about two-thirds are female, 25% are 65-74, 25% are 75-85, and 50% are 85+, most are middle to middle-upper income, most are generally in fair to good health, and about half come from senior residential facilities (transportation is sometimes provided by the facilities or SOS volunteers). All programs at the Chabad Center are free but a suggested donation of \$5 is requested for Shabbat dinners.

### **Phoenix Holocaust Survivors’ Association (PHSA)**

PHSA is an organization for Holocaust survivors, their descendants and others interested in preserving memory of the Holocaust, bringing Holocaust awareness to the community, and serving the needs of survivors.

There are presently 216 members of the organization (membership is \$18/person; free for Holocaust survivors), approximately 120 are survivors (all seniors, by definition). Of PHSA’s total membership, 90% are seniors; about 60% are female, 95% are Jewish, about half are 75-85, most are middle income and in fair or good health, and the majority resides in Phoenix and Scottsdale.

PHSA hosts monthly “Café Europa” gatherings where kosher lunches/dinners are served (educational programs/entertainment are often included). These gatherings are held at either the VOSJCC in Scottsdale or Temple Beth El in Phoenix and typically 40-90 people attend. Meals are free to survivors; other PHSA members pay \$18 and non-members pay \$25. Annual funding for Café Europa comes from the Claims Conference (The Conference on Jewish Material Claims Against Germany).

PHSA provides speakers to the community; survivors share their Holocaust experiences with students, civic, religious and other groups. No fee is charged to groups requesting a speaker. PHSA plans and executes the annual community-wide Yom HaShoah Commemoration (held at different venues, typically synagogues, each year). Attendance averages between 300-700; at least half are seniors. Additionally, PHSA is a co-sponsor of the annual “Days of Remembrance,” several days of activities, largely centered at the VOSJCC, related to Holocaust memory and education. PHSA also occasionally co-sponsors other

community activities that in some way involve or are of benefit to Holocaust survivors, or promote Holocaust awareness and education in the community.

Generations After (GA) – Descendants of Holocaust Survivors in Greater Phoenix, is a newly formed group operating under the auspices of the PHSA. Part of its mission includes providing assistance to aging Holocaust survivors. In that vein, GA's Assistance to Survivors committee is planning to:

- arrange for rides to help survivors attend Café Europa and other Holocaust related events
- create a resource list of professional service providers (attorneys, financial consultants, tax preparers, medical and dental providers, car repair shops, etc.) who offer free or discounted services to Holocaust survivors

Additionally, in conjunction with JFCS, PHSA and GA are co-sponsoring the *Care Across Generations* program, described above under JFCS.

### **Jewish War Veterans (JWV)**

There are currently three active posts in the JWV's Department of the Southwest:

- Post 194, Valley of the Sun (Phoenix)
- Post 210, Scottsdale
- Post 619, Copper State (Chandler)

JWV posts are civilian organizations for Jewish veterans (with honorable discharges from the Armed Services) and non-veterans interested in supporting veterans and Jewish causes. Individual posts (chapters) draw members from a distinct geographic area and typically offer monthly meetings (with special topics or speakers), a newsletter, and occasional social events. Member dues are largely sent to the national JWV organization, with a small amount given to the regional (Southwest) department and retained for the local post.

Post 210 (Scottsdale) currently has 138 members: almost all are seniors (with an average age of 82), 97% are male, and most are in fair health.

### **Jewish Social Clubs**

There are many Jewish social clubs for seniors and baby boomers in the Phoenix area. Most are affiliated with an active adult retirement community (age-restricted, e.g. 55+). It was not possible to research all Jewish social clubs for seniors and therefore the following groups do not constitute a complete listing.

#### **Sun City Grand Shalom Club**

The Sun City Grand (SCG) Shalom Club is a social group for residents of the Sun City Grand residential community. In addition to monthly meetings (at the SCG clubhouse), the Club

sponsors an annual “Welcome Back” brunch, book discussions, a movie club, outings to casinos, theaters, sporting events, pot luck meals, game nights, entertainers, speakers on various topics, and holiday functions. The Club initiated a “Helping Hands” project, to assist those in need of support during illness, incapacity, or bereavement but, to date, no one has availed themselves of the service.

There are currently over 200 members in the Club; most are 75 or younger. Annual membership is \$20/person; events and outings occasionally have additional costs. The Club has a newsletter and website.

### **Jewish Social Connection**

A social club centered in Sun City West, the Jewish Social Connection is the result of a historical merger between the Jewish Social Club and the Oneg Shabbat Club. In addition to monthly meetings at the Sun City West Community Center, the Club offers bi-monthly restaurant outings, themed luncheons every other month at the Community Center, and holiday events. The Club has a monthly newsletter

There are presently over 100 members and most are in their 80’s. Annual membership is \$15/person.

### **Jewish Singles Group of the Sun Cities**

Just six years old, the Jewish Singles Group of the Sun Cities offers activities once or twice each month, including miniature golf, stick bowling, holiday and game parties, and progressive dinners. There is an annual meeting to plan events for the year.

There are presently more than 40 members of the group; 85% are women and all are between the ages of 66 and 84. Annual membership is \$10/person.

### **PebbleCreek Shalom Club**

Membership of the PebbleCreek Shalom Club is open to all PebbleCreek residents (an active adult community in Goodyear) with an interest in Jewish heritage. Monthly meetings are held at the PebbleCreek club house and include programs with speakers and entertainers. Additionally, the club sponsors three annual holiday events, monthly bowling and golf, parties and dances, theater outings, book groups, progressive dinners and many other social events. Group members also coordinate High Holiday services.

ii. **GOVERNMENTAL AGENCIES**

Arizona Department of Economic Security (AZDES) – Division of Aging and Adult Services  
Office of the Arizona Attorney General – Taskforce Against Senior Abuse (TASA)  
Office of the Arizona Attorney General – Community Outreach & Education  
Arizona Department of Health Services – Bureau of Long Term Care Licensing  
AHCCCS and ALTCS – Arizona Health Care Cost Containment and Long Term Care Systems  
Arizona Commission for the Deaf and the Hard of Hearing (ACDHH) – AzTEDP (Arizona  
Telecommunications Equipment Distribution Program)  
Maricopa County – Human Services Department (HSD)  
Maricopa Associated Governments (MAG)  
Valley Metro Regional Public Transportation Authority (RPTA)  
City of Scottsdale Senior Services  
City of Phoenix  
Public Libraries  
(City) Senior Centers  
(City) Lifelong Learning Programs  
New Frontiers for Lifelong Learning (Mesa Community College)  
RISE Learning for Life (Rio Salado Community College)

**Arizona Department of Economic Security (AZDES) – Division of Aging and Adult Services (DAAS)**

AZDES is the state’s primary agency to address senior needs. Their Division of Aging and Adult Services (DAAS) provides some direct services to Arizona residents but most are provided through contracting with Area Agencies on Aging organizations (see AAoA in next section on nonprofit organizations) throughout the state.

**Adult Protective Services (APS)**

APS works in partnership with law enforcement, the courts and community based service providers to help protect vulnerable adults from abuse, neglect or exploitation. A Central Intake Unit receives reports of abuse, neglect, and exploitation 24 hours a day, seven days a week via a statewide toll-free phone line and online reporting.

**Long-Term Care (LTC) Ombudsman**

Through the LTC Ombudsman, DAAS identifies, investigates and resolves complaints related to individuals in long-term care facilities. The Ombudsman educates, promotes and advocates for residents and assists with obtaining needed services.

**Aging and Disability Resource Consortium (ADRS) – AZLinks.gov**

The DAAS created a virtual ADRS by creating the website, AZLinks.gov, a single, coordinated system of information and access to services for seniors, people with disabilities, and caregivers.

### Independent Living Supports

AZDES funds and provides administrative support to the Area Agency on Aging (AAoA) - Region One, to implement the following services locally (see AAoA in the Nonprofit Organizations section for further information).

- Home and Community Based Services
  - adult day care and day health care
  - home delivered meals and congregate meals
  - home health aides (personal care/homemaking/housekeeping)
  - visiting nurses
  - respite care
  - transportation
- Arizona's Legal Assistance Program (information, advice, assistance and advocacy to persons 60 years of age and older)
- Family Caregiver Support Program (services to family caregivers, including grandparents raising grandchildren)
- Senior Community Service Employment Program (part-time training opportunities for unemployed, low-income seniors)

### **Office of the Arizona Attorney General – Taskforce Against Senior Abuse (TASA)**

In 2011, under the auspices the Arizona Attorney General's Office, the Taskforce Against Senior Abuse (TASA) was formed. TASA responds to reports of elder abuse and financial exploitation, and implements and develops elder abuse educational and prevention programs. TASA provides a dedicated phone number or email address for the public, city and county law enforcement agencies, caregivers or family members to report any suspected abuse or fraudulent activities. Reports are forwarded to, and handled by, authorities with the appropriate expertise.

### **Office of the Arizona Attorney General - Community Outreach & Education**

The Arizona Attorney General's Office provides information on Life Care Planning as well as documents to assist individuals with making choices about who will manage their affairs in the event of an emergency. The AG's Office provides:

- a short video (via their website) to encourage people to engage in open discussions about their life care plans
- a Life Care Planning packet of materials, including
  - general information about Arizona laws related to future incapacity
  - frequently asked questions on Life Care Planning
  - planning documents (with instructions for completion):
    - Durable Health Care Power of Attorney
    - Durable Mental Health Care Power of Attorney
    - Living Will (End of Life Care)
    - Letter to My Agent (Representative)

- Pre-Hospital Medical Directive (Do Not Resuscitate)

### **Arizona Department of Health Services – Bureau of Long Term Care Licensing**

The Bureau of Long Term Care Licensing provides an online Complaint Submittal Form that allows anyone with knowledge or concerns about a suspected violation to submit a complaint. A complaint is a suspected violation of Arizona state rules and/or statutes or federal rules governing the operations of licensed Long Term Care Nursing Homes. Most complaints are filed by residents, family members, concerned friends, guardians of residents, facility staff members, other health professionals and ombudsmen.

### **AHCCCS (Arizona Health Care Cost Containment System) – Medicaid**

#### **ALTCS (Arizona Long Term Care System)**

AHCCCS is Arizona's Medicaid agency that offers health care programs to serve Arizona residents. Individuals must meet income requirements (below a certain gross monthly amount) to be eligible for services. For older adults who meet the income criteria, AHCCCS offers health insurance with no monthly premiums. Also offered is assistance with paying for Medicare premiums.

For those needing long-term care services, AHCCCS provides the ALTCS program, Arizona Long Term Care System for those who are 65 and older or blind or disabled. Eligibility criteria are restrictive regarding income and financial assets. A partial list of services provided includes:

- Skilled nursing facility
- Assisted living residence
- Attendant care
- Hospice
- Adult day health care
- Home delivered meals
- Case management

### **Arizona Commission for the Deaf and the Hard of Hearing (ACDHH) – AzTEDP (Arizona Telecommunications Equipment Distribution Program)**

Serving the Deaf, Hard of Hearing, Deaf-Blind, and people with speech difficulties, through the AzTEDP the ACDHH provides a comprehensive telecommunications loan program including amplified telephones, TTYs (TeleTYpewriter), captioned telephones, and speech devices. There is no cost for borrowing the equipment. To be eligible, clients must complete an application that is signed by a certified professional verifying hearing and/or speech impairment.

A primary device (used telephone or TTY; or a voucher used to purchase one new) and secondary devices (such as an extra ringer or light signaling device) may be requested. The AzTDEP main office in Phoenix assists people with selecting and using the equipment.

### **Maricopa County – Human Services Department (HSD)**

The Community Services Division of the County’s HSD administers various programs and services for special populations, including older adults. Eligible individuals and families may receive:

- Emergency Services Assistance - temporary financial assistance for basic needs, including utility payments, home rents or mortgages, food/clothing/shelter, case management and information and referral
- Home weatherization and energy conservation - repair and replacement of heating/cooling appliances
- Sessions and workshops through the “Boomers and Beyond Club,” for older adults seeking employment. Networking opportunities are provided and issues specific to the mature working population are addressed at two Maricopa Workforce Career Centers (Gilbert and Phoenix).

The flagship program for seniors (and adults with disabilities) offered through the County’s Community Services Division is SAIL (Senior Adult Independent Living). Case management is provided by SAIL for those 60 and older and who meet criteria related to income, resources, family support, and ability to perform activities of daily living (ADLs). Priority is given to those with greatest economic and social need.

SAIL case managers conduct in-home evaluations to determine needs and make referrals to appropriate local service providers. Case managers coordinate services and continuously monitor an individual’s progress and changing needs. Referred services may include:

- Home delivered meals (for those who are homebound)
- Personal care/home health aide
- Homemaking services
- Visiting nurse
- Adult day health center programs
- Transportation
- Legal assistance
- Caregiver support
- Recreation/senior centers
- Counseling
- Minor home repairs
- Volunteer opportunities

- Older worker programs

Almost 7,000 people received SAIL services in State Fiscal Year 2012. Over 40% needed assistance at the nursing home level of care but in-home services contributed to their ability to remain at home.

On average the cost per client receiving SAIL services is \$2,200/year, drastically lower than the cost of an older adult in an assisted living facility or on Medicaid in a skilled nursing facility (on average \$5,000/month).

The Area Agency on Aging (AAoA) Region One contracts out the SAIL program to the Maricopa County HSD (see AAoA in the Nonprofit Organizations section). *All SAIL services presently have significant wait lists.*

### **Maricopa Associated Governments (MAG)**

MAG is a Council of Governments that serves as the designated Metropolitan Planning Organization (MPO) for regional planning in Maricopa County. MAG provides planning and policy decisions in areas of transportation, air quality, water quality, and human services. Through its Human Services Division MAG addresses the needs of many special populations, including seniors.

MAG facilitates the Regional Aging in Place Network (municipalities, nonprofit organizations, faith-based entities, community groups, residents and the Virginia G. Piper Charitable Trust) to coordinate efforts to help seniors age in place. Network projects include:

- 2011-2012 Municipal Aging Services Project - Developed an aging services model for local governments from the results of an inventory of older adult services, focus groups, survey of older adults, and a regional community forum.
- 2012-2013 (Round 1) and 2013-2014 (Round 2) City Leaders Institute on Aging in Place - Cities of Phoenix, Tempe, Northwest Valley and City of Scottsdale participated in aging in place pilot projects.
- 2012-2014 Community Agenda Initiative - A national pilot project funded through the Pfizer Foundation to provide technical assistance to the City Leaders Institute sites.

A complementary effort of the Community Agenda Initiative is a recently launched website, hosted by MAG, called Connect 60 Plus ([www.connect60plus.com](http://www.connect60plus.com)). The site is designed as an interactive space for:

- Participation in forums on various topics
- A regional map of important facilities and resources
- A calendar of events
- Information on community initiatives
- Resource listings for
  - Aging in place services

- Transportation
- Arts and culture
- Volunteering opportunities
- Lifelong learning programs
- Health and safety
- Home modification
- Legal services

### **Valley Metro Regional Public Transportation Authority (RPTA)**

Valley Metro is the regional transit system in the Phoenix metropolitan area. Local governments (Avondale, Buckeye, Chandler, El Mirage, Gilbert, Glendale, Goodyear, Maricopa County, Mesa, Peoria, Phoenix, Scottsdale, Surprise, Tempe, Tolleson and Wickenburg) help fund the Valley-wide transit system. Valley Metro provides commuter bus service (local, LINK, Express and RAPID), light rail, neighborhood circulators, rural route, Dial-a-Ride, East Valley Ride Choice, vanpool service, and an online carpool and vanpool matching system.

Fixed route bus service is generally available throughout most of metropolitan Phoenix within the 101/202 freeway loop. Some areas beyond the 101/202 freeway loop also receive service, including Fountain Hills, Goodyear, Buckeye, Estrella, South Mountain, Ahwatukee, and Sun Lakes.

Most local and rural bus fares are \$2/ride. Express and RAPID rides are \$3.25. Reduced fares are available for those who qualify, including seniors (65+). In most cases, all-day passes, 7-day, 15-day or 31-day passes are available for purchase at a cost savings. All Valley Metro vehicles are 100% mobility accessible and have ramps or lifts to accommodate wheelchairs. Instructions to riders are available in Braille and by spoken/audio systems. Service animals are welcome.

Light Rail Service is currently one line, from downtown Mesa to West Phoenix (Bethany Home Road, just east of I-17). The fare is \$2/ride and, as with bus fares, all-day and multi-day passes, as well as reduced fares (including for seniors 65+), are available. A new, free Phoenix Sky Train links the light rail directly to Sky Harbor airport.

Dial-a-Ride is a paratransit service available to those with disabilities and seniors 65 and older (a few cities offer Dial-a-Ride to the general public under specific conditions). It is a door-to-door service designed for people unable to access local bus service. Dial-a-Ride operations are located in the following service areas:

- East Valley (Tempe, Mesa, Chandler, Gilbert, and limited areas of Scottsdale)
- El Mirage (administered by Northwest Valley Dial-a-Ride)
- Glendale (administered by the City of Glendale Transit Service)

- Paradise Valley (depending on trip destination, administered by either East Valley Dial-a-Ride or Phoenix Dial-a-Ride)
- Peoria (administered by the City of Peoria Transit Division)
- Phoenix (administered by the City of Phoenix Public Transit Department)
- Southwest Valley (administered by Phoenix Dial-a-Ride)
- Sun City, Sun City West, and Surprise (administered by Northwest Valley Dial-a-Ride)
- Tolleson (administered by City of Tolleson Senior Transportation)
- Youngtown (administered by Northwest Valley Dial-a-Ride)

Riders can be picked up and taken to anywhere *in the service area*. Transfers are required to travel into another service area; Dial-a-Ride assists passengers with coordinating transfers.

As a shared ride service, other stops occur to pick up and drop off passengers. Consequently, passenger pick-ups and arrivals occur within windows of time. Dial-a-Ride fares vary depending on service area and distance travelled, but generally range from \$1-\$4/one-way trip. Monthly passes are available for purchase. Reservations are required (one to 14 days in advance). Personal care attendants are allowed to accompany riders and may ride for free. Companions may also ride with qualified passengers but must pay the same fare.

East Valley RideChoice Program is a taxi service available to seniors (65+) and persons with disabilities residing in Chandler, Gilbert, Mesa or Tempe. A RideChoice Fare Card is provided and allows customers to load value (via payment) onto their card, with a portion of the total value subsidized by their city of residence. City subsidies range from two-thirds to three-quarters of the card's total value. Riders book their taxi trips directly with any of the eight participating taxi providers. A RideChoice Medical Trip Card is also available for no charge to dialysis patients to and from the closest dialysis center. Program participation may be limited depending on city of residence.

All municipalities within the Greater Phoenix area offer services to their residents and often include services specifically to address the needs of older adults. For example, the most populous cities (Phoenix, Mesa, Chandler, Scottsdale, Tempe, Glendale, and Gilbert) all provide senior centers, public libraries, transportation and supportive services for older adults. It was not possible to research and report on all city government services. Consequently two cities were selected for in-depth review, Scottsdale and Phoenix, where it is believed the majority of the Valley's Jewish population resides.

### **City of Scottsdale**

In addition to providing usual city services, such as emergency financial assistance, subsidized housing, rent/utility assistance, shelters, clothing, meals/nutrition programs, etc., Scottsdale also offers a free Trolley service and an integrated system of Senior Services to help older adults, including:

- Social services and case management

- Two senior centers and one neighborhood center (with senior programming)
- Cab Connection Program
- Adopt-a-Senior and Beat the Heat
- Home Safe Home
- “All Things Senior” Annual Senior Expo
- Walking History Books
- Entertainment Extravaganza

#### Social Services and Case Management

Social workers and case managers are available via telephone or in-person at the Granite Reef and Via Linda Senior Centers, and the Paiute Neighborhood Center to provide seniors and their families with information and referral, education and resources free of charge. Seniors are connected with services and programs provided by the City or through partner agencies, including - but not limited to - support groups, health, wellness and safety classes, insurance, legal advice, medical benefits and tax filing assistance, transportation options, emergency food boxes (“brown bags”) and meal/nutrition programs. Social workers can make home visits and assessments upon request (limited to Scottsdale residents only).

Granite Reef and Via Linda Senior Centers offer a variety of programs, recreational and educational classes, health and wellness checks, special events, support services and other opportunities, all geared toward senior adults. Both Centers are open six days a week and have state-of-the-art fitness facilities with weights and cardiovascular equipment, as well as computer labs. A wide array of recreation and fitness programs occur daily, including dancing, table tennis, billiards, games, bingo, cards (bridge, pinochle, etc.), mah jongg, art programs, and exercise classes (yoga, dance, strength training, tai chi, chair exercises, etc.). Senior softball is also offered and takes place at rotating ball fields throughout Scottsdale. A large selection of educational classes is offered, under headings such as art, communication/language, computers, and personal development. Matter of Balance sessions are offered at both centers, a program to reduce falling (and fear of falling) and increase activity levels.

The Centers sponsors many support groups, topics include specific medical diseases, bereavement, people with disabilities, depression, etc. There are also numerous social groups, various kinds of discussion groups, music groups, hiking clubs, films, karaoke, and other entertainment.

There is no membership fee for either Center. Some individual programs and services require fees.

Granite Reef Senior Center is located at Granite Reef and McDowell Roads in South Scottsdale, at the nexus of several cities and many important community facilities. It is a 37,500 square-foot facility, built in 2006, with an adjoining one-acre a courtyard connected to McDowell Village, a senior living facility (many residents of McDowell Village walk to Granite Reef to participate in programs and services).

Granite Reef, through its partnership with the Tempe Community Action Agency (see Not-for-Profit Organizations section), offers hot congregate meals during the week (typically five days/week; budget cuts can impact the frequency). Seniors 65+ are asked to pay \$3.50/meal (younger participants pay \$5/meal). On average, 50 people take advantage of the congregate meals. A medi-loan program is also offered through Granite Reef, providing assistive devices (such as walkers, wheel chairs, canes shower benches, etc.) to Scottsdale residents for a small monthly rental donation fee (if unaffordable, fee may be waived).

The Center had as many as 900,000 annual “customer contacts” in 2011/2012. All age brackets of seniors are well-represented at Granite Reef and there is a notable presence of Baby Boomers (ages 50-67). Similarly, the estimated income range of customers is quite wide. While Granite Reef is located in the zip code with the lowest median income residents in Scottsdale, it also attracts high income customers from downtown Scottsdale. An estimated 10-15% of the Center’s visitors is Jewish.

Public transportation options to Granite Reef include The City of Scottsdale Neighborhood Trolley. Dial-a-Ride is also available for qualified riders (see Valley Metro above).

Via Linda Senior Center is located at Via Linda Road, just south of Shea Boulevard, in east-central Scottsdale. It is a 20,000 square-foot facility, adjacent to Scottsdale Ranch Park and close to many important medical and senior-related facilities.

Approximately 141,000 “customer contacts” at Via Linda were tracked in 2011/2012. An average day will see 500 people visit the Center (more in winter; less in summer); two-thirds are female, more than half are estimated to be Jewish, the majority are 75-84 years old and middle to middle-high income, equally in very good, good, or fair health, and while most live in their own homes, some come from neighboring senior residences such as Sierra Pointe and Tuscany. The vast majority of customers reside in central or north Scottsdale but some also live in Fountain Hills, Cave Creek, and north Phoenix.

In the winter many classes fill up and have waiting lists; classroom availability can become tight.

It is estimated that more than 50% of the seniors who utilize the Center for social services/case management assistance are Jewish.

There are no public transportation services to the Via Linda Senior Center, except for Dial-a-Ride qualified riders (see Valley Metro above).

Paiute Neighborhood Center is located downtown Scottsdale and offers a variety of senior programs with a building dedicated to senior services and recreational activities (open 10 AM – 4 PM, Monday-Friday). Paiute’s senior programming includes outings, movies, social events, book discussions, educational presentations, exercise classes, health/wellness workshops, and recreational activities such as games, card playing and mah jongg. There is no membership fee. Individual programs and services may require fees.

In 2011/2012 Paiute saw an estimated 14,000 “customer contacts” at their senior center. The majority of center participants is female, between the ages of 75-84, middle-low income, in good health, living alone in South and Central Scottsdale, and as many as 10% may be Jewish.

Public transportation options to Paiute include The City of Scottsdale Neighborhood Trolley. Dial-a-Ride is also available for qualified riders (see Valley Metro above).

Cab Connection is a taxi voucher subsidy program for Scottsdale residents who are disabled or seniors. Cab Connection is a transportation alternative offering more flexibility and independence at a relatively inexpensive cost.

Participants may request up to 16 one-way vouchers per month. The City of Scottsdale pays 80% of the fare, up to a maximum of \$12.49 per trip. The rider is responsible for the balance of the fare and the tip.

Participants contact one of the participating cab companies to schedule their trips. Unlike Dial-a-Ride, the program serves the full city limits of Scottsdale. Travel is permitted outside Scottsdale as long as the ride begins or ends within the city limits.

In 2013 more than 1,200 seniors participated in the Cab Connection program. The majority reside south of Bell Road and are 80+ years old.

Adopt-a-Senior and Beat the Heat Programs serve low-income, homebound seniors in Scottsdale. Seniors are referred by City of Scottsdale social workers and home-delivered meal programs. For Adopt-A-Senior, a collection of donated items begins each year in October and gift bags are delivered to recipients before Christmas. For Beat the Heat, a collection of donations begins each year in April and care packages (with items providing relief from summer heat) are delivered in late June. Over 225 recipients are served by these programs each year.

Home Safe Home is offered through the Scottsdale Fire Department and is part of the citywide “2 Fit 2 Fall Initiative” to reduce falls among seniors. Home Safe Home involves trained fire department volunteers visiting seniors in their homes to identify potential tripping and falling hazards. Volunteers can replace smoke alarm batteries or install a new alarm and offer free nightlights.

“All Things Senior” Annual Senior Expo and Tradeshow is held in the winter to provide informational resources to those 50 and older. In 2013 it was held at the Scottsdale Center for Performing Arts. Representatives from government, nonprofit organizations and for-profit companies staff tables to provide information on their services, including senior housing, healthcare, recreation, transportation, supportive in-home and community services, financial management, lifestyle and entertainment, etc.

Walking History Books is an oral history program, administered as a partnership between the Scottsdale Public Library and Senior Centers, that aims to collect, preserve and share the stories of Scottsdale’s seniors. Oral history interviews, conducted by trained volunteers, include collecting and digitizing photographs and documents that are uploaded to the Scottsdale Public Library’s website.

Entertainment Extravaganza is Scottsdale's annual signature variety show that features Scottsdale's talented seniors.

Scottsdale Trolleys/Neighborhood Circulators The City offers a number of different trolley services, free for all riders. The various trolley lines go to schools, recreational facilities, shopping areas, hotels, libraries, the Granite Reef Senior Center and Paiute Neighborhood Center, hospital/medical facilities, sporting venues and special event sites. Trolley routes were designed based on census information that targeted low-income, disabled and senior segments of the community to better serve these populations. Many of the trolleys connect to Valley Metro fixed bus routes or other municipal trolley services, such as Tempe ORBIT. Three trolleys operate year round (all share connection points) and one seasonally. Separate trolley services are added for special events and baseball spring training at the Salt River Fields at Talking Stick.

The trolley fleet is currently comprised entirely of hybrid vehicles with low-floors that board at sidewalk level and have ramps for passengers in wheelchairs or who cannot climb steps.

Neighborhood Trolley makes a loop through south Scottsdale and runs every 20 minutes, seven days/week, 7 AM – 9 PM, except for major holidays.

Downtown Trolley makes loops through Old Town Scottsdale, the Arts District, Fashion Square, etc., running every 15 minutes, seven days/week, 11 AM – 6 PM (until 9 PM on Thursdays), except for major holidays.

Miller Road Trolley has replaced the former Valley Metro fixed Route 76, and runs from Scottsdale Community College to McDonald and Miller, south along Miller to McKellips, every 30 minutes, 5:30 AM – 11 PM, Monday-Friday, and 6:30 AM – 8:30 PM, Saturday and Sunday.

Day Tripper is a seasonal trolley, running along Scottsdale Road from Princess Boulevard (north end) to Fashion Square (south end), every 30 minutes, 11 AM – 10:20 PM daily, after Christmas to March 31.

### **City of Phoenix**

Phoenix offers usual city services, such as emergency financial assistance, subsidized housing (six H.U.D. homes for seniors and adults with disabilities), rent/utility assistance, shelters, clothing, meals/nutrition programs, etc. The City's Senior Services Division provides a variety of programs and services specifically to meet and enhance quality of life for older adults. Most of these programs and services are offered at one of the City's 16 senior centers. Phoenix also provides transportation services available to or exclusively for seniors.

Senior Centers There are 16 senior centers located throughout the City of Phoenix. All are open 8 AM – 5 PM, Monday – Friday, and provide case management, information and resources for a wide

variety of services. The centers also offer recreational, social, and educational programming, such as exercise and educational and classes, fitness opportunities, games, card playing, mah jongg, dancing, entertainment and club activities. Congregate meals are provided five days/week (free for people 60+ or disabled; donations are encouraged). Home delivered meals are arranged for those who qualify. The Centers are widely distributed throughout the City, as far south as Pecos Road and I-10 (Pecos Senior Center), to as far north as Pinnacle Peak Road, west of I-17 (Goelet A.C. Beuf Senior Center).

An annual fee of \$10 is assessed to Phoenix residents, and \$20 to non-residents, to use the senior centers. For all 16 centers combined, approximately 8,500 seniors pay these fees on an annual basis; slightly more than half are white/European-American, 10% Latino-American, 8% Asian-American, 5% African-American; and more than one-third are 65-74, slightly less than one-third are 75-84. The centers located where a higher population of Jews *may* reside (presumed from data in the 2002 Greater Phoenix Jewish Community Study) include Paradise Valley Senior Center (near 40<sup>th</sup> Street and Bell Boulevard, east of Rte. 51), Shadow Mountain Senior Center (near 36<sup>th</sup> Street and Thunderbird Road, east of Rte. 51), and Devonshire Senior Center (between Camelback Mountain and Rte. 51).

Senior Companion Program provides volunteer opportunities to seniors who are 55+ and on a limited income. Volunteers provide friendship and support services to City clients who are usually homebound, who may also have physical and/or mental health limitations and may be at risk of being institutionalized. Senior Companion volunteers strengthen their clients' capacity to live independently and enable them to remain in their own homes for as long as possible.

Transportation Services are provided by the City of Phoenix to assist older adults with their transportation needs.

Senior Center Shuttle (replaced the city's Reserve-a-Ride program) provides transportation to and from Phoenix senior centers for seniors (60+) and adults who are disabled. Members of Phoenix senior centers are provided with flexible transportation through the use of taxi service between their personal residence and their nearest senior center during center operating hours.

Passengers must register at their senior center to receive a fare card. Once a fare card has been issued, passengers may call any of the contracted cab companies for rides to their nearest senior centers. Rides may be requested as little as 30 minutes before desired pick-up time. Fare cards are scanned by taxi drivers. Passengers pay a \$1 co-pay for each one-way ride and co-pays may be waived due to need. Wheel chair accessible taxis are available.

Senior Cab Coupon Program helps Phoenix residents 65+ reduce the out-of-pocket cost for taxicab trips. Participants must register by mail and can then order coupons on a monthly basis. Coupons are sold in batches of 20 (\$6), 40 (\$12), 60 (\$22) and 80 (\$32) and each is worth \$1 toward cab fare. Therefore, depending on the number of coupons purchased, participants end up paying 30-40% of full cab fare. Participants schedule rides directly with cab companies and can travel anywhere in the area. Wheel chair accessible taxis are available.

Phoenix Dial-a-Ride is operated by Phoenix Public Transit. See Dial-a-Ride section under Valley Metro RPTA, above.

Neighborhood Circulators, operated by Phoenix Public Transit, are mini-buses that take residents a short distance to their favorite local places such as the grocery store or the community center. This is a free transit service that runs daily and is available in three Phoenix communities - Ahwatukee Foothills, Maryvale/Desert Sky, and Sunnyslope, as well as the Business Circulator in downtown Phoenix.

The ALEX (Ahwatukee Foothills) and MARY (Maryvale/Desert Sky) are approximately 20-mile routes that run seven days/week, every hour, during specified hours of operation. The SMART (Sunnyslope) is an 8-mile loop that runs every 35 minutes, seven days/week, during specified hours of operation. The DASH (Business) is a short route between the State Capitol and Central Station that runs every 12 minutes, Monday-Friday, 6:30 AM – 6:30 PM.

### **Public Libraries**

Maricopa County and most municipalities in Greater Phoenix have public library systems that provide programs and services of benefit to older adults. In addition to books, CDs, DVDs and other traditional resources, most libraries provide computers with internet access and wireless service. Many have free study rooms available, meeting rooms that can be rented, and volunteer programs.

Larger public library systems, such as Maricopa County (19 branches or regional libraries), Phoenix (17 libraries) and Scottsdale (five libraries), offer a vast array of educational services and programs, such as computer and English as a Second language (ESL) classes, book discussions, health and wellness, learning specific crafts, and job and business skills training. Phoenix and Scottsdale library systems have a regular schedule of art exhibitions, author presentations, and special events. The Scottsdale Public Library hosts sessions for Scrabble players, musicians, writing groups, poetry readings and storytelling, as well as a program called Scottsdale Senior Academy where groups of two to five older adults gather on a regular basis to study community issues.

### **City-Run Senior Centers**

In addition to the JFCS Center for Senior Enrichment at Chris Ridge, the City of Scottsdale and the City of Phoenix Senior Centers reviewed above, many other cities also operate senior centers, including but not limited to Avondale, Chandler, Fountain Hills, Gilbert, Glendale, Guadalupe, Peoria, Surprise, Tempe, and Tolleson. Information on senior centers in Fountain Hills, Surprise and Tempe are included below. These cities responded to the Study's service provider questionnaire. A smaller number of other senior centers in the metropolitan area are run by not-for-profit or Christian-based organizations, some of which are covered in the next section of this report.

A wide variety of programs and amenities are found at senior centers. Each center differs in the specific services provided but may include the following:

- Congregate and/or home-delivered meals
- Information and referral
- Case management and connection to supportive services
- Support groups
- Fitness centers/equipment
- Exercise classes
- Educational classes
- Health and wellness programs
- Recreational classes and programs
- Games, cards, mah jongg
- Social events and clubs
- Outings to destinations of interest
- Volunteer opportunities

Some centers charge a membership fee and some do not. Fees are typically required for certain amenities, classes, trips, etc. Most are open Monday-Friday or Saturday, during varying “business hours,” and most do not have a specially designated transportation system (a notable exception being City of Phoenix) to bring people to the centers (meaning clients must use public or private transportation or drive themselves).

#### Fountain Hills

##### Fountain Hills Activity Center

Located just a few blocks from Fountain Park in the heart of Fountain Hills, the Activity Center is open Monday-Friday, 9 AM – 4PM. A full slate of programs and classes is offered, including educational topics, languages, SeniorNet computer classes, arts and crafts, exercise, dancing, discussion groups, movies, card playing, mah jongg, ping pong, and other games. The Center also offers many support groups, health screenings, dances, social events, social services, legal and medical insurance consultations, and a medical equipment loan program.

Home delivered meals are also offered to Fountain Hills residents, a hot noon-time meal seven days each week. Those who receive home delivered meals must meet eligibility criteria. Approximately 50 clients receive meals each year and pay \$7/meal; financial assistance is available if clients cannot pay.

Membership in the Center is open to anyone 18 and older; \$20 annual fee for residents of Fountain Hills and \$30 for non-residents. Currently there are 1,225 Center members.

#### City of Surprise

Surprise Senior Center is located north of the intersection of W. Grand Avenue and W. Greenway Road, on Hollyhock Street, and is open 8 AM – 4 PM, Monday–Friday. The Center receives approximately 20,000 participants (must be 50+) annually: most are women, in the 65-74 age bracket, lower-middle income, in very good or good health, and live with a spouse or partner in Surprise. There is a \$12 annual membership fee for Surprise residents (\$15 for non-residents), with an additional \$30 annual fee for Surprise residents to use the fitness center (\$35 for non-residents). A special six-month winter membership is also available. Some classes require additional fees. Congregate hot meals are available for those 60+; donations are requested (\$3.50).

#### City of Tempe

Escalante Multi-Generational Center is a 30,000 square-foot facility located on E. Orange Street, just west of the 101 Loop and south of University Drive. There is a fitness center as well as recreational and educational facilities. Congregate meals are offered through the Tempe Community Action Agency (see Nonprofit Organizations section).

Cahill Senior Center is located on W. 5<sup>th</sup> Street, south of E. Rio Salado Parkway and north of W. University Drive. The Center is open 8:30 AM – 8:30 PM, Monday –Thursday, and 8:30 AM – 2:30 PM on Friday, and offers a full schedule of educational and recreational senior programming. Over 2,200 older adults utilize the Center annually; the overwhelming majority is female, most are between 75-84, in good health, and live with a spouse or others in Tempe. Some programs operate at capacity due to facility space limitations. Small fees are charged for some programs and for hot congregate meals (\$3.50) provided by the Tempe Community Action Agency (see Nonprofit Organizations section).

#### **Lifelong Learning Programs**

Lifelong learning programs are geared toward older adults who wish to engage in university-quality learning experiences. Programs typically include short courses, lectures, participation in community initiatives, and field trips.

New Frontiers for Lifelong Learning - Mesa Community College (MCC), Center for Continuing & Community Education

New Frontiers was created through the auspices of MCC's Center for Continuing & Community Education. It is a peer-led, self-governing organization dedicated to advancing learning and social opportunities for active adult members in the East Valley and metropolitan Phoenix. New Frontiers provides classes, social events, hiking, travel, dancing and volunteering.

Classes and activities are held at various MCC campuses as well as at the Red Mountain and Mesa Active Adult Centers. Membership is open to anyone interested in lifelong learning. Most

members reside in the East Valley and some are snowbirds. Dues are \$80/year or \$60/semester (three per year). Some activities and classes have additional fees.

RISE Learning for Life – Rio Salado Community College Lifelong Learning Center (Surprise)

RISE is a grassroots community-based educational organization created for and by seniors to afford them the opportunity for intellectual stimulation, enlightenment and interaction with peers.

Classes are held at the Rio Salado Community College campus in Surprise and require membership, which is open to any Maricopa County mature adult resident for \$45/person/year.

### iii. NONPROFIT ORGANIZATIONS

The number of nonprofit providers of older adult services in Greater Phoenix is vast. Consequently, it was not possible to do a comprehensive review of all providers in this category. Key providers were selected for inclusion in this Study, based on one or more of the following:

- total numbers of seniors served;
- belief that a notable number of Jewish seniors may utilize these services;
- location of services provided relative to where Jewish older adults reside;
- completion of a service provider questionnaire for this Study; and/or
- breadth and/or uniqueness of services provided.

Area Agency on Aging Region One

East Valley Adult Resources

Benevilla

Foundation for Senior Living

Duet

Neighbors Who Care

Foothills Caring Corps

Additional Providers of Volunteer-Based Aging in Place Services for Older Adults

About Care

Gilbert Cares

Tempe Neighbors Helping Neighbors

Verde Cares

Y-OPAS (Outreach Program for Ahwatukee Seniors)

Sun City West Foundation, Inc.

John C. Lincoln Adult Day Health Care

Hospice of the Valley

Banner Olive Branch Senior Center

Valley of the Sun YMCAs

Arizona YWCA Metropolitan Phoenix

Alzheimer's Association – Desert Southwest Chapter

Banner Alzheimer's Institute

Arizona Caregiver Coalition

Lifelong Learning Programs

Osher Lifelong Learning Institute

Tempe Connections – Friends of the Tempe Library

AARP (American Association of Retired Persons)

One Voice Community Center

Justa Center

St. Mary's Food Bank Alliance

Tempe Community Action Agency

Rebuilding Together – Valley of the Sun  
Sun Sounds of Arizona  
Arizona 2-1-1 - Community Information and Referral Services  
www.LawforSeniors.org  
Right Path Health Screenings (Cathedral Health Services)  
Experience Matters  
Creative Aging Programs – Mesa Arts Center and West Valley Arts Council

### **Area Agency on Aging (AAoA) Region One**

The national system of Area Agencies on Aging (AAoAs) was established under the Older Americans Act in 1973. There are eight AAoAs located throughout the state of Arizona, including rural, urban, and tribal communities. AAoA Region One advocates, plans, coordinates, develops and delivers home and community-based services for 90,000 individuals annually in five client populations in Maricopa County:

- adults, 60 years and older;
- adults, 50 years and older with special needs, such as grandparents raising grandchildren, victims of late-life domestic violence and elder abuse;
- adults, aged 18 and older, with disabilities and long-term care needs;
- persons of all ages with HIV/AIDS; and
- family caregivers.

AAoA Region One is a private nonprofit organization but the bulk of its funding comes from government sources, notably from the federal Older Americans Act, Social Services Block Grant and Arizona Long-Term Care System.

### **Services and programs of the AAoA Region One**

#### **Information and Assistance**

##### **24-Hour *Senior* HELP LINE (602-264-4357 or 888-264-2258)**

The *Senior* HELP LINE provides information, referral and assistance to older adults, persons with disabilities, caregivers, concerned friends and neighbors, and caring professionals. Assistance is available 24 hours a day/seven days per week in English and Spanish. The *Senior* HELP LINE serves as the central intake point for nearly all of AAoA's programs and services. The *Senior* HELP LINE serves approximately 3,000 clients each month, three-quarters of which female.

##### **Aging and Disability Resource Connection (ADRC)**

The ADRC provides information and assistance related to long term care services and support to individuals, professionals, or concerned community members. The ADRC is a collaborative effort involving six other partner agencies.

### Options Counseling

Support and action planning are offered to people considering long term care options (may include family, friends and others identified by the client). This service can be provided in-home or in-office, by appointment.

### Benefits Assistance Program

Part of the national network of State Health Insurance Assistance Programs (SHIP), the Benefits Assistance Program provides education, information and assistance to people on Medicare. Assistance includes information regarding Medicare and Medicaid, Medicare drug plans and supplemental insurances, and paperwork. Staff and trained volunteers assist approximately 1,000 clients each month by telephone or in-person.

### Arizona Fall Prevention Coalition

Coordinated by AAoA Region One, the AZ Fall Prevention Coalition provides education, awareness and outreach to reduce the risk of falls through medication management, physical activity, and home and environment modification. An informational website, [www.azstopfalls.org](http://www.azstopfalls.org), is available in English and Spanish.

### **Home and Community Based Services**

#### SAIL – Senior Adult Independent Living

The purpose of SAIL is to help people (60 or older or adults who are disabled) live in their own homes as long as possible by providing case management and specific services, such as home-delivered meals, homemaker and home health aide services, home nursing, adult day health care, and home repairs.

SAIL is contracted out to the Maricopa County Human Services Department (see Governmental Agencies section, above). *All SAIL services presently have significant wait lists.* Diminished funding over the past six years has had a significant impact on the ability to provide services.

Last year over 4,000 individuals were served by the SAIL program: the majority was female; almost half were under the age of 74; and 72% lived alone.

#### North Scottsdale/Paradise Valley Home-Delivered Meals

Homebound elderly residents in need, living in these specific communities, can receive hot meals delivered five days each week by a volunteer. This is a private-pay program based on eligibility.

#### Care Transitions

Also known as Healing@Home, this new program is part of an initiative mandated by the federal Affordable Care Act. Its objective is to reduce 30-day hospital readmissions by 20%. AAoA Region One is the local administrator for the program, in partnership with four Maricopa County

hospitals, and serves Medicare beneficiaries who are at high risk for readmission. Services are provided during a 30-day post-hospitalization intervention period, and include home visits, follow-up reassurance calls, a home safety check, depression screening, and a complete assessment to link clients to other needed programs and services.

### **Family Caregiver Support**

#### **Family Caregiver Support Program**

In-home family consultations are provided to determine caregiver needs, provide education and emotional support, and to serve as a link between the caregiver, AAOA and other social service agencies. Other services include:

- **Respite**  
Caregiving relief services (by skilled professionals) provide a break from the role of caregiver. *There is presently a significant wait list to receive this service.*
- **Lifespan Respite Care Program**  
Respite services for caregivers who do not qualify for services under other respite programs due to age or financial restrictions, diagnosis of person being cared for, etc.
- **Caregiver support groups**  
Throughout Maricopa County groups are conducted to provide information, support, and assistance to caregivers of older adults. Some groups are tailored to specific situations, such as caring for those with Alzheimer's or Parkinson's disease.
- **Caregiver forums**  
At different locations throughout the County, forums are offered to provide useful information to caregivers on legal and health issues, resources for care receivers, family relationships, etc.
- **CarePRO (Care Partners Reaching Out)**  
A workshop series spanning ten weeks, CarePRO is designed to improve caregivers' skills and coping mechanisms. There are five in-person group workshops as well as personalized calls from a "coach."
- **Kinship Care**  
This is a program to assist grandparents (as well as aunts and uncles) raising grandchildren with legal, financial and parenting issues. Support groups are offered as well as an annual full-day program of education and information.

### **Elder Rights**

### DOVES Program

DOVES assists adults 50 and older who are victims of late-life domestic violence or elder abuse. The following services are provided:

- Support groups
- Emergency housing – a combined effort with community partners to provide free emergency housing for up to two weeks. A care plan is initiated during this time, including crisis intervention, community referrals and a plan for discharge.
- Transitional housing – housing for up to two years in the DOVES facility (15 small, one-bedroom furnished apartments in a building with laundry facilities, computer center and community room). Case management is provided to assist with applying for benefits, job training, becoming self-sufficient, etc.
- Interim housing – three apartments are located away from the transitional housing facility to provide DOVES “graduates” a place to live while awaiting affordable housing, finishing school, or certification, etc.
- Community education and awareness – outreach about late-life domestic violence to older adults and the larger community, including presentations and educational materials.

### Long-Term Care Ombudsman Program

Ombudsmen serve as advocates for and provide assistance to long-term care residents, their family and friends, facility staff and the larger community to resolve issues affecting the quality of life and care of residents in skilled nursing and assisted living facilities.

### **Supportive Services**

#### Legal Assistance

AAoA contracts with the Senior Citizens Law Project to provide free legal advice, representation, referral and education to older adults, primarily those who are low-income.

#### ElderVention

This program provides basic services related to behavioral health issues in older adults;

- Prevention/community education – Workshops and distribution of program materials at senior centers or other locations for older adults at risk for depression, anxiety, or substance abuse.
- Clinical treatment – Clinical services, during normal business hours, are typically offered in clients’ homes (limited office appointments are also available). Payment can be on a sliding scale basis and insurance is accepted.

### Multipurpose Senior Centers

AAoA supports (with funding) various services at 25 different senior centers throughout Maricopa County. Additionally, AAoA operates the Mosaic Senior Center in Phoenix, for refugees 60 and older.

#### Health Promotion

AAoA contracts out presentations and activities at senior centers related to disease prevention, chronic disease management, exercise, medication management, mental health, dental hygiene, nutrition, health screenings, and fall prevention. Several of these programs were developed by universities or foundations and are nationally recognized and utilized, such as Matter of Balance, Chronic Disease Self-Management, and Walk With Ease.

#### Assistive Devices Coordination

AAoA provides eligible low-income seniors (60+) with hearing aids, eye glasses or low-vision devices.

#### **Life Enrichment**

##### AgeWORKS

AAoA is the local implementer of AgeWORKS. Low-income older adults (55+) seeking employment can participate in the Senior Community Service Employment Program (SCSEP) which provides paid training opportunities. Trainees typically work 20 hours/week at minimum wage for a nonprofit organization or public agency.

##### RSVP (Retired Senior Volunteer Program)

RSVP engages older adults (55+) in volunteer activities and settings, at nonprofit organizations and public agencies. RSVP enrollees receive volunteer placement, mileage reimbursement (when needed), accident and liability insurance, and volunteer appreciation and recognition. RSVP in the East Valley (Tempe, Chandler, Mesa, Gilbert and other communities) is administered by East Valley Adult Resources (see below).

#### **East Valley Adult Resources (EVAR)**

EVAR provides a variety of services to older adults residing communities throughout the East Valley. Service categories generally include:

- **Outreach**  
The goal of EVAR outreach is to link older adults and their families to helpful community resources by providing information and making referrals via phone calls, office and in-home visits, community presentations, and providing flyers and pamphlets. Outreach specialists also help seniors by initiating applications for benefits programs.
- **Home Delivered Meals**

Hot meals delivered Monday-Friday, available for elderly or disabled persons living alone and often homebound, for private pay or with a subsidy.

- **Transportation**  
Different options are available in the cities of Apache Junction, Mesa, Chandler, Gilbert and Tempe. They are run by the cities, Valley Metro, or other transportation companies, including East Valley RIDE Choice (which includes cab coupon programs, mileage reimbursement in Mesa, and Dial-a-Ride), Apache Junction RIDE Choice (mileage reimbursement), and free local bus circulators. EVAR coordinates with these entities to meet the needs of its clients. Additionally, EVAR has vans that take people to and from the Apache Junction Active Adult Center, as well as to medical appointments.
- **In-Home Services/Assistance for Independent Living (AIL)**  
EVAR provides non-medical in-home assistance to homebound or disabled seniors (55+). Professional services (provided by a home care agency) include light housekeeping, personal care, meal preparation, medication reminders, and in-home respite care. Average cost for professional services is \$18-\$21/hour. EVAR also provides volunteer in-home services, called Caring Corps, which includes transportation for medical appointments and grocery shopping, prescription pick-ups, phone reassurance calls, friendly visits, and visual assistance. All volunteers are background checked and fingerprinted.
- **Caregiver Assistance**  
EVAR sponsors three free Caregiver Forums each year in Mesa to provide education, resources and tools for family and friends who are caregivers, as well as a six-class session called "Powerful Tools for Caregivers."
- **Affordable Housing**  
EVAR provides the Discovery Point Retirement Community, southwest of the intersection of E. Main Street and N. Power Road in Mesa, a 182-unit independent living residence for adults 55 and older. Residency qualifications stipulate maximum annual incomes for one person or a couple. All residents pay the same rent, and utilities are included. Discovery Point provides amenities and services typical of independent living residences, such transportation, two meals/day, weekly housekeeping, linen service, entertainment, outings, recreational activities, exercise classes, lectures, socializing and reading rooms, courtyards, swimming pool, hair salon, and a wellness clinic. If needed, additional supportive services are available, a la carte. The average age of Discovery Point residents is approximately 86. Most residents are non-Hispanic white, female, and single.

EVAR is in the process of building a new affordable senior housing facility downtown Mesa. It will have 81 units and will be geared toward active adults 62 and older. It will not provide many services due to its downtown location and proximity to services.

- RSVP (Retired Senior Volunteer Program)  
 EVAR has operated the RSVP program (part of AAoA services listed above) in the East Valley for the past ten years and presently has about 300 volunteers. EVAR also has volunteers serving in the AAoA Senior Companions program, specially trained “volunteers” who provide respite care and who receive \$2/hour as compensation.

Many specific services are provided at or through one of three active adult centers operated by EVAR, but owned by the municipalities in which they are located:

- Mesa Active Adult Center (southeast of the intersection of N. Country Club and W. University Drives)
- Red Mountain Active Adult Center (Mesa; inside the Red Mountain District Park, just south of E. Brown Road)
- Apache Junction Active Adult Center (north of Highway 60, on N. Idaho Road)

At each of these centers, programs and services can include:

- benefits assistance
- legal assistance
- transportation
- congregate meals
- meal preparation for home-delivery
- health and wellness checks/programs (including weekly *Vital Signs* presentations)
- support groups (for specific diseases, grief, loss, caregiving, disabilities, etc.)
- presentations on topics of interest (finances, Medicare, law, fraud prevention, etc.)
- outreach services:
  - home visits/resources
  - Assistance for Independent Living (see above) case management

There is a suggested donation of \$3.50 for congregate meals. Annual membership is \$15 and is encouraged but not required. The average age of EVAR active adult center participants is 75 (somewhat younger at the Apache Junction facility). The Red Mountain Center serves 550-750 people each month; 80% are female, 70% are between 75-84, and most are in good health.

### **Benevilla**

Benevilla serves the West Valley, providing human and social services to help keep people independent and in their own homes for as long as possible. Services include:

- Information and Referral (I&R)

Trained specialists assist individuals and families with understanding and finding resources in the community. Referrals are made to Benevilla's services as well as those provided by other agencies. Benevilla receives approximately 600 I&R phone calls each month.

- **Adult Day Programs**

Benevilla's Adult Day Programs provide physical, mental and social activities for adults with chronic physical conditions, dementia-related illnesses or developmental disabilities in six centers serving the Northwest Valley:

- **Mary's (Memory Care) Place** – located in the heart of Sun City, Mary's Place serves those with mid-late stages of dementia and is the only location in Arizona that specializes in day services for those with advanced stages of Alzheimer's or dementia-related disorders.
- **Lucy Anne's (Memory care) Place** – located in Surprise, on the main campus of Benevilla, Lucy Anne's Place serves those with early to mid-stages of dementia and is the first adult day center in Arizona to feature an optional intergenerational program where adult participants interact with children enrolled in Wirtzie's Preschool and Child Care (also a program of Benevilla on its main campus).
- **Sun City Restorative Care** – located in the heart of Sun City, this facility serves adults requiring physical therapy after a stroke, injury, extended hospital stay or having other long-term care needs.
- **Helping Partners Program** – is located at two separate centers, one in Sun City and the other in Peoria, and serves adults with intellectual disabilities. Helping Partners provides stimulating activities, exposes participants to volunteer opportunities and provides employment skills training and opportunities.
- **Peoria Day Center** – located on W. Cactus Road just east of the 101 Loop, the center provides general day services to a diverse group of people with a wide range of care needs. Activities are adapted to include everyone's participation.

All centers are open weekdays and provide full and part-time participation options. Staff includes nurses, activity and physical therapists, and aides. Meals and snacks are provided and prepared on Benevilla's main campus in Surprise. Door-to-door transportation is available for a small fee and is provided in Benevilla's wheelchair accessible vans. Almost 400 adults are served by Benevilla's adult day programs each year. There are 25-30 participants each day in each center; the majority are over 80 and almost half reside in the Sun Cities. Full-day daily fees range from \$70-80, depending on the level of care required. Benevilla has contracts with agencies that provide financial assistance for those in need.

- **Caregiver Education and Support Groups**

Forums are hosted to provide caregivers with helpful information and resources. A variety of caregiver support groups are offered in Sun City, Sun City West, and Surprise for general

caregiving, caregivers of those with Alzheimer's and memory disorders, and caregivers of adults with developmental disabilities. Benevilla can arrange respite care during select support group meeting times.

- Family Resource Center/Grandparents Raising Grandchildren

Outreach and education services are provided to support grandparents raising grandchildren. It is believed there is a particularly high incidence of this in the Northwest Valley. There are presently four support groups offered; two in Surprise, one in Peoria, and one in Wickenburg (one is slated to begin soon in Glendale). Benevilla has a resource lending library and offers seminars for grandparents raising grandchildren. Additionally, they offer family events, child play groups, activities and parenting resources through its Wirtzie's Child Development Center.

- Other Support Groups

Benevilla also offers support groups for those experiencing bereavement and grief (Surprise), and those living with Parkinson's disease (Sun City West).

- Volunteer Home Services

Presently Benevilla engages 700 volunteers to assist older adults who need help with transportation, grocery shopping, emergency errands, business (organizing home financial affairs), minor home repairs, or who need a friendly visitor or phone pal. These services are provided at no charge but donations are accepted.

- Home Delivered Meals

Volunteers deliver mid-day meals to homebound adults. Meals are prepared at a commercial scale kitchen on the main campus of Benevilla and special diets are accommodated. Meals can be delivered to residents in Sun City, Sun City West, Surprise, El Mirage, Peoria and Youngtown. Meal costs range from \$8-10. They are full, multi-course meals. Costs may be lowered for those with financial need.

- Transportation

Benevilla has a fleet of ten vans (most are wheelchair accessible). They are used primarily to transport people to adult day programs but are also occasionally utilized for other purposes, such as holiday shopping. The cost is \$12/ride/passenger.

- Community for All Ages

On Benevilla's main campus in Surprise there is a community garden with intergenerational activities, a monthly farmer's market, a lifelong learning partnership with Rio Salado Community College, which abuts Benevilla's campus, and an arts center featuring:

- a performance stage
- arts and culture programming (artist receptions, book signings, lectures)
- sensory garden

- Birt's Bistro, Bookstore and Catering

A café and bookstore provide social and entertainment opportunities for the community. Proceeds are reinvested into Benevilla's services. Books and artisan items are sold; meals and snacks are served; and live music is performed two evenings each week by local artists. Birt's also offers catering services to the community.

- Emergency Response System

Benevilla offers a 24-hour medical alert service (a button to push in one's home) and provides professional installation through a partnership with Philips Lifeline.

### **Foundation for Senior Living (FSL)**

FSL is one of the largest nonprofit organizations in Arizona with 550 employees in 33 corporations, producing an exceptionally diverse income stream, and is the sole member of the Roman Catholic Church, Diocese of Phoenix. Its mission is to improve quality of life for seniors, adults with disabilities and their family caregivers, and especially those most vulnerable. Its service area is Maricopa County, though some services are currently expanding to Prescott and Flagstaff, and its clients are served without regard to race, religion or socio-economic status. Services provided to older adults fall into the following categories:

- Adult Day Health Programs

FSL owns and manages four centers for seniors with physical disabilities, people with Alzheimer's disease and dementia, stroke survivors, and seniors who cannot stay alone at home during the day. Services include nursing supervision, restorative therapy, meals and snacks, recreational and social activities, outings and special events, and limited transportation. Private pay fee for services is \$10-\$12/hour, depending on level of care needed. Funding sources are available to assist with financial hardship.

- Glendale Adult Day Health Services Center is located near the intersection of W. Northern Avenue and NW Grand Avenue. The center serves approximately 200 clients each year: about one-third are under the age of 65 and one-third are 65-74; about half are European-American/Caucasian, 25% are Hispanic-American and 17% are African-American, almost half are below the poverty line or low income, and most reside in Glendale or west Phoenix.
- Phoenix Adult Day Health Services Center is located just south of W. Indian School Road between Highway 51 and I-17. The center serves over 200 clients each year: about one-third are under the age of 65 and almost 40% are 65-74; about half are European-American/Caucasian; 30% are Hispanic-American; 15% are African-American; more than half are below the poverty line or low income; and almost all reside in central Phoenix.

- Tempe Adult Day Health Services Center is located just southeast of the intersection of E. University Drive and the 101. The center serves 180 clients each year: one-quarter are under the age of 65; 40% are between 75-84; almost three-quarters are European-American/Caucasian; 15% are Hispanic-American; 10% are African-American; over half are below the poverty line or low income; and almost all reside in Tempe, Ahwatukee or the East Valley (about 10% reside in central and south Scottsdale).
- Scottsdale Adult Day Health Services **closed in June 2014**. It was located downtown Scottsdale on E. 2<sup>nd</sup> Street. The center served 140 clients each year: 20% under the age of 65; 40% between 75-84; 30% were 85+; 60% were female; more than 80% European-American/Caucasian; 12% Hispanic-American; 40% below the poverty line or low income; and 70% resided in central and south Scottsdale, 15% in north Scottsdale, and 10% in north Phoenix.
- **Adult Foster Care**  
Qualified caregivers are recruited and trained to open their homes to the elderly and adults with disabilities needing around the clock assistance and care. Up to four individuals may live as part of the family in each private Adult Foster Care home, certified by the Arizona Department of Health Services. Adult Foster Care Homes receive private pay or government reimbursements for Medicaid qualified residents.
- **Assisted Group Living**  
The Assisted Group Living Program operates 19 community-based homes throughout Maricopa County, all of which are State-licensed Behavioral Health Facilities designed for adults with serious mental health needs. 24-hour supervision, supportive personal care, therapeutic services, some medication management and monitoring, and life skills training are provided.
- **Care By Design**  
An FSL program to help seniors and other adults with special needs remain in their homes by providing a wide array of fee-based, customized services, including:
  - Home management
  - Personal assistance
  - Respite care
  - Care service coordination
  - Travel assistance
  - Caregiver support
 Long-term care insurance may cover some of these services.

- **Community Action Programs**  
Through its partnership with local communities, FSL provides emergency financial assistance (rent, utilities, moving expenses), information and referrals, food and clothing, short-term case management for residents of Peoria and Wickenburg. Funding is largely provided by government agencies.
- **FSL Caregiver House**  
This training facility, demonstration lab, and information and referral site is designed to educate, support and advocate for family and paid caregivers as well as for seniors and adults with disabilities who actively manage their own care needs. Specific services include workshops, classes, information and referral, counseling, hands-on demonstrations and education on innovative residential design and construction techniques. Most classes are free.
- **Home Care and Home Health Care**  
FSL Home Care provides personal care to assist individuals wishing to remain independent in their homes. Services include light and heavy housekeeping chores, shopping, errands, personal care, meal preparation and respite services. Home Care is offered on a fee-for-service basis. Low income individuals may be eligible for assistance through government programs, such as ALTCS or the Veterans Administration. Contracted services are also available to clients of Hospice of the Valley (see below). FSL provides transportation for a fee: \$25/hour for a driver/caregiver, plus mileage reimbursement if a caregiver's vehicle is used.

Home Health Care is provided through a certified Medicare Home Health Agency, and offers professional nursing services, physical, occupational and speech therapists, home health aides, social workers, and skilled care for clients dependent on ventilators and other critical assistive medical devices. Nursing consultation is available 24 hours a day by telephone. Home Health Care services may be covered by Medicare, Medicaid, or most private insurance plans, or are provided on a fee-for-service basis.

FSL serves roughly 600 clients each month in the Home Care and Home Health Care programs; most are 75-84 years old, represent all income levels, and reside throughout Maricopa County (excluding Fountain Hills).

- **Home Improvements**  
FSL provides home repairs (emergency or minor) and major renovations, safety/accessibility and medical modifications, and weatherization improvements by licensed and bonded professionals. Low-income seniors and disabled adults who own their own homes may be eligible for grants to cover emergency and improvement services. Major housing rehabilitation must be applied for through local city government. Due to demand and limited funding, there may be a waiting list for services.

- **Affordable Housing**  
FSL provides affordable apartments to low-income seniors and adults with disabilities throughout Arizona. Of their 13 facilities, three are located in Greater Phoenix area: Sweetwater Gardens Apartments and Vianney Villas Apartments (both in Phoenix, both US HUD Section 202 subsidized housing, both have wait lists), and Roeser Village Apartments in Phoenix.
- **Pathways Social Services**  
FSL social workers provide counseling and consultation, information and referral to community resources and, when funding allows, limited care management for needy clients. A comprehensive care plan is developed for clients and their families and delivery of client services is monitored and coordinated. Private Care Management is also offered. It is a personalized service to assist long-distance caregivers in meeting the needs of their loved ones. Social work and case management are provided by telephone, at the offices of FSL or, in some cases, clients' homes, Monday through Friday, 8 AM - 5 PM.

More than 6,000 individuals and families are served by Pathways each year: three-quarters of the clients are female; 85% are Christian; 80% or more are between 75-84 years old; and almost all are low-income, live alone, and reside throughout Maricopa County.

- **Senior Centers**  
FSL operates two senior centers, one in Peoria and one in Wickenburg, providing educational programs, health promotion and information, contacts for community services, intergenerational programs, recreational activities, congregate hot lunches, home-delivered meals, volunteer opportunities, and transportation assistance.

**Duet: Partners in Health and Aging**

Duet promotes health and well-being through a broad range of services to homebound adults, caregivers, faith communities, and grandparents raising grandchildren. Duet provides these services in Phoenix, Glendale, Peoria, Paradise Valley, Scottsdale (south of Frank Lloyd Wright Boulevard) and Fountain Hills.

- **Support Services to Homebound Adults**  
Duet helps homebound older adults and adults with disabilities live independently in their own homes by providing assistance with:
  - Grocery shopping and other errands
  - Transportation to medical appointments
  - Friendly visiting and phoning
  - Paperwork assistance

- Handyman services
- Home safety assessments
- Limited respite assistance (up to two and a half hours each week)
- Computer assistance

Seven hundred trained and screened volunteers provide these free services (although donations are appreciated). Three quarters of the volunteers are over the age of 55 and 60% have been recruited through partnerships with area faith congregations. Presently just four Jewish congregations have partnered with Duet, out of a total of 150 partner congregations, and only four or five active Duet volunteers have been recruited from these Jewish congregations. By contrast, an estimated 10% of those receiving Duet’s Homebound Adults services are Jewish seniors. *There is a wait list for some of the volunteer services provided by this program.*

- **Nurses in Faith Communities**  
Duet provides guidance, training and support to registered nurses who wish to combine their professional skills with their faith, to promote health, healing, and disease prevention in a congregational setting. More than 50% of the faith community nurses trained by Duet are volunteers with their respective congregations.
- **Caregivers**  
Duet provides support groups, some of which are specific to dealing with Alzheimer’s and Parkinson’s diseases, and for the LGBT community. Also provided is information and referral, workshops and retreats and limited volunteer respite (see above) for family caregivers.
- **Grandparents Raising Grandchildren**  
Duet provides *free-of-charge* support groups, workshops, group and recreational activities for families, respite assistance, information and referral, and legal guidance for the increasingly common circumstance of grandparents raising grandchildren.

### **Foothills Caring Corps**

Dedicated to promoting independence and enhancing the quality of life for older residents or adults with disabilities, Foothills Caring Corps provides services and support in North Scottsdale (zip codes 85255 north of Bell Road, 85262, and 85266), Carefree, Cave Creek and Carefree Highway to I-17 (zip codes 85085 and 85086).

Foothills Caring Corps’ service area is not densely populated and has notable “snowbird” (seasonal) migration. Consequently there are challenges with providing and receiving social and supportive services. For example, Carefree residents have no mail delivery; they must go to the post office to

receive their mail. There are presently no known adult day health services in this area, no congregate meal site, and practically no Valley Metro bus service. Isolation and loneliness can be especially prevalent for those living in this area who cannot drive and/or have chronic health or memory issues.

Most services offered by Foothills Caring Corps are free but donations are requested. Approximately 550 volunteers provide services to 700 clients called “neighbors”; 75% of the volunteers are seniors themselves and half are snowbirds and therefore unavailable to provide assistance for a portion of the year.

- **Transportation (door-to-door)**  
Foothills Caring Corps has a fleet of vans and provides rides for medical appointments and grocery shopping (accompanied by volunteers who provide assistance), and social and recreational purposes (shopping, lunch outings, movies, libraries, bingo, concerts, special events, etc.). For those who request transportation regularly, Foothills Caring Corps will request a contract to determine what a neighbor would like to pay and how often. About 50% of neighbors pay something.
  
- **In-Home Services**
  - Friendly visits and phone calls – Volunteers make phone calls or can visit with neighbors one to two hours each week. A new program was recently launched to have pets participate in visits to neighbors’ homes.
  - Mobile Meals – A lunch time hot meal is delivered by volunteers who can also visit for a few minutes. Neighbors receive these meals on a short- or long-term basis and must meet eligibility requirements such as being homebound, ill, with a sudden injury or post-surgery.
  - Caregiver respite – Volunteers spend time with an older adult while providing relief for his or her caregiver (up to three to four hours each week).
  - Care Alert Program – Neighbors who qualify can receive free in-home personal emergency alert systems or other safety devices programmed to call for help in the event of a fall or urgent medical situation.
  - Minor home repairs – Volunteers make simple home repairs and safety modifications.
  - Paperwork/business/computer assistance – Volunteers assist with reading and sorting mail, paying bills, and using computers.

### **Neighbors Who Care (NWC)**

NWC provides community volunteers to help the elderly live at home for as long as feasible with pride, dignity, and independence. Eligible clients must be residents of Sun Lakes or south Chandler and be homebound, an adult with disabilities or undergoing life-saving medical treatment, a low-income senior (over 60), a caregiver in need, or post-hospitalization and without immediate family or monetary resources.

Three-quarters of NWC's 600 clients reside in the Sun Lakes area where there is no public transportation, including no public medical or paratransit services. Sun Lakes (population 20,000) is a planned community consisting mostly of active adult (55+) and senior living residences. Many residents are snowbirds and therefore NWC's volunteer numbers decrease drastically in the summer (from 500 to 200), presenting a challenge for meeting clients' needs. The vast majority of NWC clients are low income, over the age of 75, and in fair or poor health.

All services provided by NWC are free (with the exception of home-delivered meals) and include:

- **Home Delivered Meals**  
A hot dinner is delivered by volunteers to homebound or disabled clients five days each week. Clients pay a discounted fee at the time of meal delivery. Financial assistance is available for those who qualify.
- **Case Management**  
A NWC social worker provides case management services to clients, their families and the community. Clients' needs are assessed, services are arranged, information is provided, and/or referrals are made.
- **Transportation**  
NWC has its own van. Volunteers, who receive special training to drive the van, transport clients for grocery shopping and to select local stores. In volunteers' personal cars, transportation is provided to and from medical appointments.
- **Shopping/errands**  
Volunteers take clients to grocery and other stores or facilities, with a maximum of three stops per outing. Volunteers can also do the shopping or run the errands for the clients.
- **Friendly visiting and reassurance phone calls**  
Volunteers make regular visits to the homes of clients to provide companionship and make phone calls to check on clients' welfare.
- **Minor home repairs**  
Volunteers make small repairs and minor installations, such as changing light bulbs and air filters.
- **Caregiver relief and support**  
Respite is provided to caregivers by trained volunteers who will stay with the caregiver's loved one up to four hours each week. NWC offers a weekly support group for caregivers in Sun Lakes.

- Paperwork and business assistance  
Volunteers help with opening and sorting mail, paying bills, checkbook balancing, preparing tax papers, handing medical and other insurance papers, etc.
- Business service advocacy  
Assistance and advice is provided in dealing with repair and financial contractors, as well as in resolving service complaints.

### **Additional Providers of Volunteer-Based Aging in Place Services for Older Adults**

About Care  
 Gilbert Cares  
 Temple Neighbors Helping Neighbors  
 Verde Cares  
 Y-OPAS (Outreach Programs for Ahwatukee Seniors)

In addition to East Valley Adult Resources, Benevilla, Duet, and Neighbors Who Care (described above), several other local nonprofit organizations provide volunteer-based aging in place services to older adults and adults with disabilities. These organizations fill a critical gap between government services (often not comprehensive and with restrictive eligibility criteria and wait lists) and private for-profit services (unaffordable for many seniors). A map and table of a geographic network of Greater Phoenix volunteer-based aging in place service providers, their service areas, services provided, and contact information can be found in Appendix 5.

- **About Care**  
Serving elderly and physically challenged homebound residents of Chandler and Gilbert, About Care utilizes almost 200 trained volunteers to provide the following free of charge services to 350 clients (“neighbors”):
  - Transportation
  - Shopping and errands assistance
  - Respite care for caregivers
  - Paperwork and computer assistance
  - Friendly visits and reassurance phone calls
  - Minor home repairs
- **Gilbert Cares**  
Gilbert Cares was originally founded as an organization to renovate the homes of low income seniors and adults with disabilities in Gilbert who are physically and financially unable to perform this work themselves. Volunteers were young men and women residing

in Gilbert. Due to demand and popularity of the services, over time Gilbert Cares recently expanded its resident and volunteer participants to Chandler, Mesa, Tempe, Apache Junction, Queen Creek and, most recently, an entire neighborhood in South Phoenix. To date, Gilbert Cares has refurbished almost 90 homes in the Greater Gilbert community.

- **Tempe Neighbors Helping Neighbors (TNHN)**

TNHN provides assistance with yard work and landscape maintenance and minor home repairs and modifications to low income and frail residents of Tempe who are 65 or older or have a confirmed disability. Volunteers perform all services for owner-occupied dwellings. Residents are responsible only for the cost of supplies, although financial assistance may be available if needed.

- **Verde Cares**

Verde Cares provides non-medical care and assistance for seniors and their families residing in the communities of Rio Verde, Tonto Verde and the neighboring Verde foothills. Trained volunteers provide the following services free of charge:

- Transportation
- Shopping and errands assistance
- Respite care for caregivers
- Paperwork and computer assistance
- Friendly visits and reassurance phone calls
- Minor home repairs
- Home delivered meals

Verde Cares also offers two monthly support groups (memory loss and macular degeneration) as well as a twice monthly golf putting and lunch event.

- **Y-OPAS (Outreach Programs for Ahwatukee Seniors)**

Y-OPAS is a program of the Ahwatukee Foothills Family YMCA and provides supportive services to residents of the Ahwatukee Foothills who are 62 or older and their caregivers. Approximately 125 trained volunteers provide the following services to 300 seniors free of charge:

- Transportation
- Grocery shopping assistance
- Respite care for caregivers
- Paperwork assistance
- Friendly visits and reassurance phone calls

### **Sun City West (SCW) Foundation, Inc.**

Sun City West, an active adult retirement community built in 1978 by the Del Webb Corporation, is a self-contained and self-governed community (unincorporated) with recreation, shopping, places of worship, and a hospital. By 1997, 31,000 people had moved to Sun City West from the 50 states, Canada and other countries. Today the population is under 25,000.

In spite of its impressive amenities, residents realized not all of their aging in place needs were being met. The SCW Foundation developed in response to some of these unmet needs. The Del Webb Corporation donated 3.4 acres for a community center, which developed in phases, and today houses SCW Foundation's office and programs, as well as meeting rooms, garage and office space for PRIDES (a volunteer program to help maintain the grounds of SCW), as well as Mary' Place, one of Benevilla's adult day health centers. One acre of the center is leased to the SCW Sherriff's Posse.

SCW Foundation programs include:

- **Helping Hands**  
Helping Hands is a program to provide loans of medical/assistive devices and children's equipment. Medical/assistive equipment, such as commodes, walkers, wheelchairs, canes, reachers, bath benches and bedside tables, are available for 90-day loans. Children's equipment (for visiting family members), such as booster seats, cribs, and strollers, are available for 30-day loans. All loans are free but donations are gratefully received.
- **Foundation Bus**  
SCW Foundation has two wheelchair accessible buses that pick up residents at their homes (by reservation) and take them to medical and therapy appointments, as well as to grocery stores and other locations. Riders pay \$4/ride and books of 10 tickets may be purchased for \$35. The Foundation Bus operates Monday – Friday, 7:30 AM – 4 PM.
- **Tax Preparation Assistance**  
An AARP tax aide is available at the Foundation community center 2/1 – 4/15 each year to assist residents with their tax forms.

### **John C. Lincoln (JCL) Adult Day Health Care**

Located in north-central Phoenix, on the campus of the JCL North Mountain Hospital, JCL Adult Day Health Care provides participants with stimulating activities and relief for their caregivers 7 AM – 5 PM, Monday-Friday. Activities range from discussion groups to bingo, arts and crafts, live entertainment and horseshoes. Off-site activities are offered as well, including trips to movies, museums and shopping malls. A day at the center includes a meal, snacks, some door-to-door transportation, personal care and hygiene as needed. Social services and counseling are available for the participant and the caregiver.

JCL Adult Day Health Care presently serves 40 clients per day; most are 75-84 years old and are from north Phoenix. The facility cannot handle more than its present clientele. Cost for participation is \$12/hour. Financial assistance is available for those who qualify.

### **Hospice of the Valley (HOV)**

HOV is the nation's oldest and largest nonprofit hospice in the nation, and is among the few nonprofit providers of hospice services in Arizona and the Phoenix Valley. HOV serves residents of Maricopa and northern Pinal counties. Those eligible for hospice services, also known as end-of-life care, must have a physician-confirmed life-limiting illness. Services provided aim to bring comfort and dignity as life nears its end.

Serving more than 17,000 annually, HOV estimates 3% or more of its patients identify as Jewish. More than half of its patients are over the age of 80, half live in the Central Phoenix Valley, 30% in the East Valley, and 20% in the West Valley.

HOV provides cultural sensitivity training to its employees and volunteers. A special training session for the needs of Jewish patients was held several years ago. Outreach and programs to address the diverse needs of HOV patients have emerged over the years, including a special volunteer program called Shabbat Blessings. Approximately 30 trained Jewish volunteers are available to visit Jewish patients in HOV's palliative care units (described below) to give Shabbat blessings if desired by patients and their families. From April – December 2013, Shabbat blessings were offered to 139 patients/families and 78 were provided.

HOV's services include:

- **Hospice Care**  
A team of professionals care for each client, including a physician or nurse practitioner, a nurse (who visits weekly or as often as needed), a nurse's aide (for personal care), a social worker, a chaplain (if requested), a volunteer (for caregiver respite, companionship or other purposes), and a bereavement counselor (for grief support and education). Patients can keep their own primary doctor or elect to have the HOV doctor oversee their care. Patients who choose to receive curative treatments for their life-limiting illness are not eligible for hospice services.

All medications, medication equipment and supplies related to the diagnosis are covered by Medicare or other insurances and are delivered to the patient's residence. No one is ever turned away for lack of insurance or financial means. Patients can receive hospice services in their own homes, including independent and assisted living senior residences, as well as short- and long-term care facilities.

Palliative Care Units – While more than 90% of HOV's patients receive services in their own homes, they can also stay, for a short period, in an HOV palliative care unit to control symptoms until the patient can return home or be cared for in another setting. To provide respite for family caregivers, HOV will care for a patient for up to five days in a skilled

nursing facility or palliative care unit. There are 15 units located throughout the Valley. One unit specializes in care for children and one specializes in care for those with dementia. Excluding the facility for children, HOV has a total of 166 palliative care unit beds.

- **Caregiver Support**  
Social workers, chaplains and volunteers all provide assistance to family caregivers, including information and referral, assistance with pertinent legal documents and insurance issues, connections to local community resources, and respite care.
- **Grief Support**  
Support groups are offered by HOV throughout the Valley (open to anyone), as well as up to 13 months of grief counseling and support to spouses/partners, family members and close friends of a loved one served by HOV. Educational resources are available online and from bereavement counselors.
- **Integrative Therapies**  
Alternative therapies such as music, massage and aromatherapy are offered by trained and certified professionals, providing comfort, pleasure, and a way to communicate for patients with dementia.
- **Arizona Palliative Home Care (AZPHC)**  
A new program HOV, AZPHC was created in 2010 to address the growing need and number of people with late-stage chronic illness who aren't ready for hospice services.
  - Palliative Care - These services are for patients needing help managing serious or complex disease processes with a prognosis of two years or less. Unlike traditional hospice services, curative treatment and palliative care can be given at the same time. Teams of health care professionals, social workers, chaplains and volunteers provide care to alleviate pain and assist with the struggles of daily living and disease management. Services are provided wherever patients live.
  - AZPHC Home Health Program – Services for patients with serious chronic illness who are mainly homebound. Services include care coordination, rehabilitation therapy, personal care, and family caregiver support. Currently these services are covered by Medicare and a few private health insurance companies.
  - Senior Placement Service – This is a free referral service to help families sort through options for senior care, including home health care agencies, group homes, assisted living and skilled nursing facilities.

### **Banner Olive Branch Senior Center**

Operated by Banner Health (nonprofit), the Banner Olive Branch Senior Center is located on the campus of the United Church of Sun City, west of the 101 and south of Grand Avenue in Sun City. The center offers a variety of social, educational, recreational and nutritional services for older adults, including:

- Health screenings
- Massage therapy
- Entertainment and trips
- Exercise programs
- Arts and crafts classes
- Cards and board games
- Lectures
- Counseling
- Social services (legal assistance, benefits and health insurance assistance, crisis and financial assistance)
- AZ Attorney General’s Satellite Office (volunteers assist with consumer fraud, scams and identity theft issues)
- Visually Impaired Program (group meetings, individual counseling, guidance and support, and rehabilitation services)
- Welfare checks (volunteers make phone reassurance calls)
- Volunteering
- Pantry and food box programs
- Congregate meals – hot lunches served Monday–Friday (\$3.50 suggested/meal) and hot breakfast on Wednesdays (\$2 or \$3/meal)
- Curbside pick-up for take-out meals
- Home-delivered meals (\$3.50/meal for those who qualify; or full price is \$7-\$8/two meals per day – one hot and one “sack” cold meal)

### **Valley of the Sun (VOS) YMCAs**

The mission of the VOS YMCA (Young Men’s Christian Association) is to build community through providing services that strengthen the mind, body and spirit so that people can learn, grow and thrive. YMCAs, like community centers, are neighborhood-based, focus on youth development, healthy living, and social responsibility, and are open to people of all ages and religious affiliations. Many programs and services to promote healthy living and social responsibility are of benefit to seniors and some are specifically designed with seniors in mind.

There are 15 individual “Y’s” in the VOS YMCA system. They are located throughout the Valley:

- Ahwatukee Foothills Family YMCA (Phoenix)
- Chandler/Gilbert Family YMCA (Chandler)
- Chris-Town Family YMCA (Phoenix)

- Copper Basin Family YMCA (San Tan Valley)
- Desert Foothills Family YMCA (North Scottsdale)
- Ross Farnsworth - East Valley YMCA (Mesa)
- Glendale/Peoria Family YMCA (Glendale)
- Lincoln Family Downtown YMCA (Phoenix)
- Maryvale Family YMCA (Phoenix)
- Mesa Family YMCA
- Northwest Valley YMCA (El Mirage) – scheduled to open June 1, 2014
- Scottsdale/Paradise Valley Family YMCA (Scottsdale)
- South Mountain Family YMCA (Phoenix)
- Tempe Family YMCA

Each “Y” varies in its facilities and amenities. Each has some or all of the following, and possibly more:

- Fitness center with cardio, strength training, and circuit training equipment
- Indoor and/or outdoor pools (lap, heated, etc.)
- Jacuzzi/whirlpools
- Gymnasium, racquetball courts, aerobics studios
- Locker rooms
- Technology centers

Programs and services also vary from “Y” to “Y.” Many are youth-oriented, many are for adults, and some are specifically tailored for older adults. Those programs and services of most interest and benefit to seniors include, but are not limited to:

- Adult health, well-being and fitness classes
  - AOA (Active Older Adult) class (exercise)
  - 55+ Alive (low-impact aerobics)
  - Silver Sneakers classes (classic, cardio-circuit, yoga)
  - Cardio
  - Health and wellness screenings
  - Weight management and health education
  - Many other exercise programs
- Adult swim and aquatics classes
  - Silver Splash
  - Shallow-water (low-impact exercise)
  - US Masters Swim Team

Healthy living, fitness center activities, community programs and Silver Sneaker classes are provided to approximately 10,000 people each year throughout the VOS YMCA system. There are 300 monthly participants in the Silver Sneakers program at Copper Basin Family YMCA and 200 monthly participants at the Ross Farnsworth-East Valley YMCA. A membership fee is required to join a “Y,” and seniors pay

less than non-seniors. The approximate monthly fee for seniors is \$50/person. Silver Sneakers classes require an additional fee but is covered by some health insurance plans.

### **Arizona YWCA Metropolitan Phoenix**

The mission of Arizona YWCA Metropolitan Phoenix is dedicated to eliminating discrimination, empowering women and promoting peace, justice, freedom and dignity for all.

Arizona YWCA multi-cultural senior/community centers – the YWCA operates four centers, all located in Glendale:

- Valley West Senior Center (open Monday-Friday, 8 AM – 3 PM)
- Glendale Community Center (open Monday - Friday, 8 AM -2 PM)
- Japanese Senior Center (open third Wednesday of the month, 10 AM – 2 PM)
- Glendale Adult Center (open Monday - Friday, 8 AM - 4:30 PM)

The mission of the YWCA’s senior centers is to provide nutrition, socialization and support to older adults, particularly those at-risk, to enable a maximum level of independent living with dignity. The centers provide many services to low-income seniors and disabled residents of Glendale. In addition to hot congregate meals, food banks, and home-delivered meals, the centers also provide social activities, recreation and exercise, companionship, social services, health education and screenings, transportation, and information and referral. The centers publish a “Silver Scoop” newsletter with health and wellness information.

The YWCA’s food programs serve 1,200 seniors each year and currently operate at capacity. Congregate meals are for people 60+ or disabled adults, and a contribution of \$2.50/meal is suggested. Recipients of home-delivered meals must be homebound and referred by case managers.

YWCA Council On Aging – This program focuses on the aging community in Glendale and regionally, and aims to improve quality of life through nutrition, socialization, and life sustaining help for older, low-income and at-risk adults. Monthly informational meetings at the senior centers are offered to those interested in issues of aging and are in need of a referral network.

“We Feed Four Feet” - This newer YWCA program was initiated in 2005 after staff who delivered meals became aware of older adults going without food and neglecting their nutritional needs in order to purchase food for their pets. The program receives contributions and pet food through individual donors, community organizations, and businesses. The pet food is provided to low-income seniors who participate in the Y’s home-delivered meals program and/or senior programs at one of the four senior centers. The program also is designed to help seniors spay or neuter a pet, get necessary vaccines and obtain licensing.

### **Alzheimer's Association (AA) - Desert Southwest Chapter (DSC)**

An affiliate of the National Alzheimer's Association, the Desert Southwest Chapter provides service and support to Alzheimer's patients, family members and caregivers throughout Arizona and Southern Nevada. The Central Region of the DSC includes Gila, Maricopa and Pinal Counties. Services offered include:

- Alzheimer's Association Helpline – A professionally staffed national telephone service that operates 24 hours a day, seven days a week, in 140 languages. Support is offered to newly diagnosed individuals, caregivers and others, as well as information, advice and community resources.
- Online Information and Referral – Provides helpful resources for persons with dementia and their caregivers, specific to the Central Region of the DSC of the AA.
- Family Care Consultation – Individualized assessment, care options guidance, interventions and resources for immediate and future needs. Consultations can occur in patients' homes or at the AA offices in Phoenix. This service is offered free of charge.
- CarePRO – In collaboration with Arizona State University, AZ DES, and the Nevada Aging and Disability Services Division, CarePRO (Care Partners Reaching Out) is a series of skill-building workshops for persons caring for loved ones coping with dementia such as Alzheimer's disease and related disorders. CarePRO sessions engage seven to ten caregivers in workshops that provide education about dementia and its impact on families. Caregivers are trained to manage stress and offered techniques to help cope and communicate better with those suffering from memory loss. The program includes personalized telephone "coach" calls to help caregivers implement the new skills. Respite care is available so caregivers may attend the sessions.
- Support Groups – Regularly held, free sessions throughout the Phoenix Valley for caregivers or individuals in the early stage of the disease to share information, experiences, build new skills and offer peer support.
- Educational Programs – Regularly scheduled, free sessions to promote awareness of Alzheimer's disease and to help families and professionals improve their knowledge and skills to enhance the care of people with dementia. The DSC offers an Annual Central Arizona Education Conference for individuals, families and professionals.
- Medic Alert + Safe Return – A 24-hour nationwide emergency response (including registration and identification) service for individuals with Alzheimer's, or a related dementia to reduce the risks associated with wandering. Enrollment/membership for a person with dementia (including identification jewelry) is \$55 with a \$35 renewal fee each year thereafter. Optional

registration and membership is available to caregivers as well, and includes identification jewelry, for \$35.

- Early Stage Programs – Activities and resources designed to engage, encourage and empower those in the early stages of Alzheimer’s disease by utilizing their strengths and capacities.
  - Connections Plus – A new pilot program to make matches between a person in the early stage of Alzheimer’s disease with a Volunteer Mentor who is also in the early stage, to facilitate one-to-one informal social interaction and support. Group outings in the community are arranged for pairs of Connections Plus participants.
  - EPIC (Early-stage Partners In Care) - A collaborative program between the Desert Southwest Chapter of the AA, AZDES – DAAS, Arizona State University, and the Area Agency on Aging, EPIC assists people with early-stage memory loss and their care partners by providing free early-stage related education and training workshops designed to reduce stress, enhance well-being, and help manage challenges.

The Central Region of the DSC serves 7,000 people annually: two-thirds are female; 60% are between the ages of 65 and 84; 70% are low or low-middle income; and 95% do not reside in an institutional facility.

### **Banner Alzheimer’s Institute (BAI)**

BAI offers a continuum of care from early to late stages of Alzheimer’s disease, including an outpatient center for diagnosis and treatment. BAI’s support services for those with Alzheimer’s or other dementias, and their families and caregivers include:

- Online Resources – Information about Alzheimer’s disease and other dementias, and referrals to community resources.
- Community Events
  - GPS (Giving People Strategies for Memory) Lecture Series is free, offered monthly and held at three locations around the Valley. Lectures cover various aspects of Alzheimer's disease and dementia, caregiving and brain health.
  - Memory Screenings - Free memory screening events throughout the community, consisting of a 30-minute non-invasive exam and consultation with experienced professionals. Information about improving brain health is also provided.
- Quality of Life Programs
  - Arts Program for Dementia Patients and Care Partners – This “Arts Engagement Program” makes visual and performing arts available to people with

Alzheimer's disease and their caregivers. Programs are offered by the Phoenix Art Museum, Scottsdale Museum of Contemporary Art, and the Phoenix Symphony.

- Making Music, Making Memories – In partnership with Arizona State University (ASU), free monthly “jam sessions” are offered to participants and their caregivers who are invited to bring instruments, play along, sing along or otherwise enjoy the music. ASU also provides instruments.
- Caregiver Resources
  - COMPASS (Caregivers Of Memory Impaired Persons Acquiring Successful Strategies) – A free 90-minute class offers an introduction to caring for someone with Alzheimer's disease, including the basics about the progression and treatment of Alzheimer's and related dementia, and where to find in-home and community assistance.
  - MAPS (Memory Assistance and Planning Session) - Provides in-depth training on what to expect in the moderate stage of disease progression, including basic behavioral management skills, communication and care options. In a home-like setting there are demonstrations of care, including bathing, oral care, management of loss of bladder and bowel control, and assisting with lifting, walking, dressing, special equipment to make life easier, and feeding and nutrition.
  - Planning Ahead – Free two-hour classes to help caregivers understand the importance of planning ahead for legal, financial and medical decisions for individuals with Alzheimer's disease and/or dementia.
  - Support Groups
    - Circle of Friends Support is free and includes spouses, adult children, other family and friends. Solutions for problems encountered by caregivers are explored.
    - "With Art In Mind" are sessions for people with dementia to participate in their own group, run at the same time as the Circle of Friends so that caregivers can bring their loved ones along. Participation in this group is \$10/person.

### **Arizona Caregiver Coalition (ACC)**

The ACC recently became an independent 501c3 nonprofit organization. Beginning in 2007, the ACC (originally called the Lifespan Respite and Caregiver Coalition) received state and federal funds to develop services for family caregivers. Government funding ended in January 2014 and ACC will now, as a nonprofit organization, be able to seek foundation grants and charitable donations.

ACC works collaboratively with the Arizona Department of Economic Security – Division of Aging and Adult Services (AZDES-DAAS) to offer the following programs and services.

Caregiver Resource Line – This is a toll free service for family caregivers to speak with trained caregiver advocate volunteers who provide information, referrals, assistance and support. The resource line is available in English and Spanish and operates Monday – Friday, 9 AM – 5 PM. Resource information for caregivers is also provided on ACC’s website. The Resource Line is a collaborative partnership between ACC, DES-DAAS, and AZ Links.

Respite Vouchers – This newly launched service aims to relieve some of the burdens of caregiving by providing financial assistance for respite care. Caregivers must file an application with the ACC in order to qualify for a \$300 voucher, issued every three months. The voucher will cover costs related to in-home care by a respite service or individual of their own choice (at least 18 years old and not residing in the same home), as well as costs for care in a facility-based respite service. Caregivers must submit bills to ACC and will be reimbursed \$12/hour for each hour invoiced. Caregivers are responsible for fees that exceed \$12/hour.

Arizona Respite Registry – Sponsored by the ACC and Rewarding Work, a national nonprofit organization with a website to assist older adults and people with disabilities hire personal assistants directly, the Respite Registry is a website set up as a subscription service where:

- Direct care workers complete applications and are listed in a secure, searchable database.
- Those looking to hire a worker complete a registration form and can use the database to find a respite care worker.

When older adults or caregivers find someone they would like to hire, they can contact the person to arrange an interview. The Respite Registry does not screen or conduct background checks of the job candidates; it is the responsibility of the employer/caregiver.

### **Lifelong Learning Programs**

Lifelong learning programs are geared towards older adults who wish to engage in university-quality learning experiences. Programs typically include short courses, lectures, participation in community initiatives, and field trips.

#### Osher Lifelong Learning Institute (OLLI) at Arizona State University (ASU)

OLLI offers educational programs for 50+ adults geared towards sustaining quality of life and healthy minds. Classes are offered at five locations:

- ASU Downtown (on Central Avenue)
- ASU West (Thunderbird Road and I-17)
- Tempe Public Library (via Tempe Connections group; see below)
- Friendship Village Tempe (a senior residence east of the 101 on E. Southern Avenue)
- Maravilla Scottsdale (a senior residence on E. Princess Drive)

In 2007, ASU received a permanent \$1 million endowment for OLLI which allowed for the expansion of programs to residential communities in the East and West Valleys:

- Sun City Festival (Buckeye)
- Sun City Anthem at Merrill Ranch (Florence)

There is a \$15 membership fee for each semester. Individual lectures cost \$10 and course fees range from \$20-\$60.

#### Tempe Connections – Friends of the Tempe Library

A program of the Friends of the Tempe Library, Tempe Connections provides educational programs, supportive planning for life changes, and social and volunteer opportunities. Adults 50+ are the target audience. Activities are held at the Tempe Public Library on Rural Road, and can include utilizing the high tech meeting room, outdoor patios, and Connections Café.

ASU's OLLI holds classes at the Temple Public Library through Tempe Connections. The same membership and course fees apply at this location. Other Tempe Connections classes and programs are free of charge.

#### **AARP (American Association of Retired Persons)**

AARP provides services and programs for people 50+ at the national, state and local levels. AARP provides:

- Advocacy – Advancing and protecting the welfare of people 50+ at the local, state and national levels.
- Information – Online resources and print materials are available on numerous topics affecting older adults. Special events are also sponsored by AARP, and many are free of charge, including lunch and learn programs, lectures, etc. AARP Arizona offers many such events in the Greater Phoenix area.
- Community Service
  - AARP has an online Caregiving Resource Center as well as a toll free phone line for information and support on caregiving.
  - Create the Good is an online service to assist older adults in locating volunteer opportunities.
  - AARP Smart Driver Course (formerly known as “55 Alive”) is geared towards drivers 50+ and is available online or in classrooms at senior centers, senior and “active adult” residential communities, and other facilities throughout the Phoenix metropolitan area. The program is administered and taught by trained AARP volunteers.
  - Products and services are available from AARP, such as insurance (health, driver, life, etc.), and discounts on many products and services such health and medical supplies,

home emergency response systems, travel, technology devices, financial services, shopping, dining and entertainment.

- AARP Experience Corps – adults age 50+ tutor students one-on-one or in small groups, in first through third grades, to improve their literacy skills and self-confidence. The City of Tempe has hosted an AARP Experience Corps program since 2006, in conjunction with the City of Tempe Community Services Department. The City of Phoenix’s Read On Initiative will host the AARP Experience Corps program in four school districts beginning fall of 2014.

AARP annual membership is \$16 and includes a subscription to AARP’s magazine and printed bulletins. The classroom Smart Driver Course is \$12 for AARP members and \$14 for non-members; the online Smart Driver Course is \$15.95 for AARP members and \$19.95 for non-members.

### **One Voice Community Center (OVCC)**

Less than ten years old, OVCC serves the Lesbian, Gay, Bisexual and Transgender (LGBT) community by providing wellness services, health and educational classes, support and social groups. Some groups and sessions are for older LGBT individuals. Located in Central Phoenix on N. 7th Avenue, OVCC also includes a library, cyber center (computer stations), art gallery and meeting and event space. The facility is open Monday- Saturday 12-7 PM, and Sunday 12-4 PM.

Annual membership is \$25 or 25 hours of volunteer service and entitles one to monthly email updates, voting rights, invitations to member-only events, and voluntary listing in a member directory. Annual corporate and nonprofit organization memberships are also available for \$50.

### **Justa Center**

The Justa Center is the only facility in the Phoenix area that caters specifically to older (55+) homeless adults. The Center basically acts as a safety net for those who slip through the cracks of the social services system. It is estimated that 50% of homeless seniors are veterans. Presently the Justa Center provides service to more than 100 homeless seniors on any given day.

Center staff help individuals locate earned benefits (such as Veterans Administration, social security, etc.), obtain housing and medical assistance, and provide information and referral. Additionally, the Justa Center provides unique amenities to homeless seniors, including showers, restrooms, laundry facilities, computer use (with internet access), lockers, coffee, books and television.

### **St. Mary’s Food Bank Alliance**

St. Mary’s is the one of the first and largest food banks in the United States, serving individuals and families who meet USDA income requirements. St. Mary’s operates as a large network of more than 350 partner agencies at approximately 430 sites.

The primary service area covers 81,000 square miles and includes two-thirds of Maricopa County and all of Northern Arizona. St. Mary's does not provide service in the East Valley.

The network collectively provides 250,000 meals per day. Emergency Food Boxes are distributed, at no cost, to individuals and families in need; 40% are over the age of 65 and most are low-income. Operation sites include domestic violence shelters, dining halls, schools, churches, children's shelters, food pantries, halfway houses, and senior centers.

A Mobile Pantry service is also provided to accommodate those unable to get to a St. Mary's Food Bank Alliance location for emergency boxes. There are presently more than 30 sites in both rural and urban locations, bringing perishable food directly to neighborhoods in greatest need.

St. Mary's Food Bank Alliance also provides numerous opportunities for volunteer work.

### **Tempe Community Action Agency (TCAA)**

TCAA is Tempe's primary social services organization, serving elderly and low-income community members with a small professional staff and hundreds of community volunteers. In addition to services to prevent homelessness and to care for those who are homeless, TCAA partners with the AAoA to deliver services to older adults 60+ and family caregivers. These services are provided in four senior centers in Tempe (Cahill, Escalante, and North Tempe) and South Scottsdale (Granite Reef), including congregate meals (hot lunches), home-delivered meals, benefits assistance, socialization and recreation services, health screenings and lectures, and Senior AmeriCorps, a national volunteer program.

At the Escalante Senior Center in Tempe, hot congregate meals are provided Tuesday-Friday. On average, 30-40 people receive meals each month; most are female, half are between the ages of 65-74, most are low income, at or below poverty, and all reside in the East Valley.

### **Rebuilding Together – Valley of the Sun (RTVOS)**

The Rebuilding Together Affiliate Network consists of 200 chapters located throughout the US. RTVOS is the local chapter serving the Phoenix area and provides many services that, collectively, result in the revitalization of neighborhoods. Services are provided to needy low-income seniors, veterans and disabled individuals. Since 1991, across the Phoenix Valley, RTVOS has utilized more than 60,000 volunteers from 500 organizations to make more than \$7 million in home repairs in more than 3,000 homes and 60 nonprofit organizations.

Services provided include:

- Senior Fall Prevention  
RTVOS makes home safety modifications to reduce household hazards and provide greater accessibility in the home, enabling a safer, more independent and comfortable life.

Modifications may include grab bars, shower benches, handheld shower heads, raised toilet seats, interior and exterior wheelchair ramps, etc.

To qualify for free senior fall prevention modifications, exterior home ramp, or exterior home painting, individuals or households must be:

- Low-income (total household income less than 50% Median Maricopa County Income)
  - Elderly (60+), or permanently physically disabled, or a veteran
  - The owner of the home (exceptions made for Senior Fall Prevention modifications)
  - Willing to have volunteers complete the work (no warranty of services is provided)
  - Within service boundaries (no more than three miles outside the 101 or 202 Loops)
- Home Repairs & Maintenance  
One day in spring each year, RTVOS organizes a local National Rebuilding Day when homes and community facilities are rehabilitated. Services include yard clean up, skilled plumbing, window replacement, flooring repairs, painting, updating electrical systems, etc.
  - Rock & Roll Paint-a-Thon  
This is an annual one-day event when thousands of volunteers paint the exteriors of owner-occupied low-income homes. In the last five years, 560 low-income elderly and disabled households had their homes painted.

All work is done on a single visit. Requests for additional work or visits may require a fee to cover costs. There are limits to the number of free modifications and installations provided per client.

Some Fall Prevention modifications can be provided in rental units with written permission of the landlord or management company. RTVOS will not remove or uninstall equipment.

### **Sun Sounds of Arizona**

Sun Sounds bridges the gap between current print media and people who cannot use it due to a medical disability. Many people lose their access to print late in life as a result of macular degeneration, diabetes, other age-related eye diseases, stroke, accident or age-related infirmity. Sun Sounds' main office is in Tempe and it services the Greater Phoenix, Tucson and Flagstaff areas of the state. All services are free of charge.

Sun Sounds provides access to print via the radio, internet, and telephone.

- Radio Service  
Volunteers read and produce programs that are broadcast on an FM station or as an audio only service on cable TV. Listeners can hear daily newspapers (Wall Street Journal, local

Arizona papers, USA Today, etc.), grocery ads, death notices, other printed news, and even some best seller books.

- **Sun Dial Telephone Reading Service**

The first of its kind, the Sun Dial service involves voice prompts over the telephone.

Listeners can connect to today's newspaper from prerecorded articles, as well as to the internet where they can hear pre-selected web pages in the Sun Dial menu.

Almost 50,000 Arizonans receive services from Sun Sounds every day; 95% are over the age of 65 and the majority is between 65 and 74.

### **Arizona 2-1-1 – Community Information and Referral (CIR) Services**

2-1-1 is the lead agency for up-to-date information on community, health, and human service resources in Arizona. The organization's name relates to the phone number one must dial (2-1-1) in order to request information and referral from trained staff who utilize a database of over 13,000 participating programs and over 37,000 community services.

In addition to the 24-hour information and referral service, 2-1-1 has a searchable online directory of local services as well as a hard copy Maricopa County Directory of Human Services and Self-Help Support Groups. The 2014 Directory contains thousands of updated listings, from basic needs to peer support to cultural and recreational programs. The Directory may be purchased for \$40/copy, plus shipping and handling.

In 2012, 2-1-1 received a total of almost 80,000 calls; 10% of those calls (almost 8,000) were from people 65+. Almost 43% of the calls received from older adults involved inquiries about financial assistance for utility bills (electric, gas, water) and rent, and emergency food.

### **www.LawforSeniors.org**

www.LawforSeniors.org is a program of the Arizona Foundation for Legal Services and Education. The website provides information and resources on legal issues relevant to seniors, including caregivers, health care, legal documents for planning ahead, consumer scams, elder abuse, choosing where to live, financial problems and debt, employment, divorce and remarriage, and death of spouse or parent.

### **Right Path Health Screenings (Cathedral Health Services)**

Right Path is the nation's only nonprofit health screening organization. Its aim is to help save lives and maintain quality of life through education, early detection, and prevention of life-threatening cardiovascular disease and related risk factors. As an alternative to the current crisis-oriented environment, Right Path provides preventive, affordable health care screening services, educates the public on healthy living practices, and addresses the health concerns of the underserved and underinsured public through community outreach programs.

Preventive health care screening services are brought to communities via partnerships with businesses, civic organizations and churches. Mobile medical equipment is transported to sites where staff provide a menu of screening options, from single abdominal or cardiovascular tests (such as liver, kidney or thyroid ultrasounds) at \$75/test, to packages of tests costing \$150 (five different cardiovascular ultrasounds or six different abdominal ultrasounds) or \$200 (all 11 ultrasounds).

### **Experience Matters**

A relatively new organization, Experience Matters brings together individuals, nonprofit organizations and the business community to the benefit of all involved. Experience Matters is for people typically 50 and older who wish to transition to an “encore career” (a new line of work) – usually from a for-profit environment to the nonprofit sector - and wish to make a positive impact. Skilled individuals are matched with nonprofit organizations, whether as a volunteer or for compensation, whether full- or part-time, according to the needs of the individuals and the organizations, and according to the aspirations and availability of the individual.

Experience Matters matches skilled individuals looking to make this transition with partner nonprofit organizations. Many organizations already reviewed in this section of the Study are member organizations of Experience Matters. Short- and long-term opportunities are provided through the following Experience Matters programs:

- Encore Fellow – Six- to twelve-month opportunities to work with a local nonprofit organization, for a small stipend, full- or part-time
- Service By Design – Short-term placement service, pro bono (no compensation), with an agency or organization in Maricopa County to engage in meaningful social purpose projects
- AmeriCorps Programs – Adults are matched with county schools to improve education and address critical needs
  - Your Experience Counts (YEC) – Mentors who are 50+ work with third to sixth graders, providing one-on-one support to low-income students who are struggling academically.
  - Boomers Serving Arizona Schools (BSAS) – Individuals 50+ work with county schools to help identify specific needs and mobilize and build partnerships in the community.

Experience Matters, at its office in Phoenix, also provides resources to help older adults (50+) navigate a path to their next desired stage in life, such as:

- Book Groups – monthly meetings where individuals partner with their peers to discuss books about encore careers, mid-life transitions, etc. (\$50 to join group, plus cost of books)
- Encore Discovery – four interactive stand-alone workshops each year to explore life transitions (\$25/session)

- Explore Your Future – a sequential series of four weekly workshops to help individuals pursue their goals (\$125 for the series)

### **Creative Aging Programs**

Associated with the National Center for Creative Aging, a clearinghouse, technical assistance and database center for arts and aging programs across the US, there are two local Creative Aging Programs in the Greater Phoenix area. These programs foster creative expression for older adults, providing meaning and purpose and the production of art works that honor life experience.

Mesa Arts Center Creative Aging Program is an artist-in-residence program in senior centers, adult day facilities, and senior residential communities in Mesa. Launched in 2001 in the Mesa Art Center's Arts Education Outreach department, program activities are led by professional teaching artists and include story, dance, movement, and art-making. Participants draw from their life experiences while creating art. Additional workshops and programs are provided to caregivers and staff at facilities so that the arts engagement process can continue beyond the conclusion of the artist-in-residence program. Participants' visual art works can be exhibited at the Mesa Arts Center's Mesa Contemporary Arts Classroom. Those in dance classes can participate in a public performance for the community.

West Valley Arts Council (WVAC) Creative Aging Initiative provides weekly classes, led by a professional artist, for older adults in the West Valley. Each semester (twelve week sessions) participants have the opportunity to exhibit their work or present a performance based on their classwork. WVAC launched the Creative Aging Initiative in 2011 to involve West Valley retirees in high quality, arts-based programming. WVAC has utilized community partnerships with local assisted living facilities and low-income housing complexes to reach new demographic groups. WVAC also trains professional teaching artists to work with older adults. Approximately 40 older adults participate each year.

#### iv. FOR-PROFIT PROVIDERS

The vast number of private, for-profit organizations and businesses in Greater Phoenix that provide services for seniors created a quandary for their inclusion in this Study. To select some, to the exclusion of others, could be perceived as favoritism. Without paid advertising in this report, a common rationale for inclusion of particular for-profit providers, there was simply no fair method to select some providers and not others.

That said, the most important information relative to the objectives of this Study is that for-profit senior services providers abound in Greater Phoenix. If one can afford to pay for products and services, they are generally available on the market. That is not to say, however, that all for-profit services are equally available throughout the metropolitan area or are of sufficient quality. Indeed, there is considerable variability in both geographic distribution and quality of private market services.

The following categories constitute the general array (though not exhaustive) of services of interest to older adults that can be purchased from private businesses and organizations:

- Health care
  - physicians, other medical service providers
  - hospitals and clinics
  - short-term rehabilitation facilities
  - other in- and out-patient medical facilities
- Dental care
- Hospice care
- Behavioral health services
  - social workers, psychologists and psychiatrists
  - support groups, family support
  - alcohol, substance abuse, and other addiction treatment and rehabilitation services
  - in- and out-patient facilities
- Housing
  - Senior residential communities
    - active adult retirement communities
    - independent living
    - assisted living (group homes and facilities)
    - memory care facilities
    - skilled nursing facilities
    - continuing care retirement communities (independent living, assisted living, and skilled nursing facility)
  - Reverse mortgages
- Adult day health care programs
  - restorative/therapeutic

- memory/dementia care – early, middle and late-stages
- Respite care – in-home care and short-term residential care
- Home health/homemaker and companion services
  - case management/assessments
  - liaison services with family members
  - nurses and therapists
  - personal care aides – meal preparation, housekeeping, errands, bathing, personal care, respite care, companionship, medication assistance, etc.
  - transportation
- Transportation – paratransit, car and van services, taxis
- Geriatric/elder care managers – case management and referrals
- Senior placement services – assistance with selecting senior residential facilities
- Elder law attorneys
- Adaptive aids, medical supplies and equipment/home safety equipment
  - hearing, vision and voice assistance devices and technology
  - mobility and assistive devices – wheelchairs, scooters, ramps, walkers, reachers, slide boards, etc.
  - medical and emergency alert systems
  - safety devices - grab bars, shower benches, remote sensor lights, etc.
- Financial/estate advising, planning and management
- Insurance products - life, long-term care, health, prescription drug
- Recreation, fitness, and socialization
  - athletic/fitness facilities
  - travel companies
  - social clubs
  - entertainment events
  - arts and crafts/music/dancing classes and lessons
- Education – lifelong learning programs, computer and technology assistance
- Home modifications, maintenance and repairs
- Meal/food services – meal preparation and delivery

v. SYNAGOGUES/JEWISH CONGREGATIONS

Interviews with congregational leaders were conducted to obtain information about educational (apart from religious), recreational or social services for older adults that may be provided by their synagogues/congregations. Conversations also occurred with congregational members and chairpersons of synagogue committees. Interviews were sought – but ultimately were not possible - with leaders of some congregations where it is known there are large numbers of senior congregants. Limited information about those congregations is included in this section. The internet was used as a supplemental resource.

Temple Beth El - Phoenix  
Congregation Beth Chaverim – Sun City West  
Sun Lakes Jewish Congregation – Sun Lakes  
Beth Ami Temple – Paradise Valley  
Desert Foothills Jewish Community Association – North Scottsdale  
Beth Emeth Congregation of the West Valley – Sun City West  
Temple Beth Shalom and Jewish Community Center– Sun City  
Religious Services in Senior Residences by Hannah Adelman  
Congregation Or Tzion (formerly Har Zion Congregation and Congregation Or Chadash) –  
North Phoenix/North Scottsdale  
Temple Solel – Paradise Valley  
Congregation Beth Israel – Scottsdale  
Beth Joseph Congregation - Phoenix  
Temple Emanuel of Tempe - Tempe  
Temple Chai – Phoenix

Temple Beth El (Conservative)

Situated in the historic hub of the Jewish community in Phoenix and one of the area’s oldest congregations, Temple Beth El is a full service synagogue with a membership that has declined by more than half in the past ten years (from 1,100 families to 400). Approximately 70% of the membership is seniors, including approximately 20 Holocaust survivors. Some of Beth El’s facilities are rented out (e.g. to the Torah Day School) to help sustain congregational activities.

Beth El’s activities and programs directed at or important for seniors include:

- Shabbat meals delivered to those recently bereaved
- Monthly movie night at the Temple
- Shabbat kiddishim are often enhanced to become luncheons (many seniors show up expressly for the meals)
- Adult education classes
- Self-governing chavurot that does its own programming
- “Blanket Boosters” – congregants crochet blankets to donate to the needy, via JFCS

- Israeli dance classes
- Minyanim that serve as strong social support systems
- BJE adult education programs and PHSA Café Europa events occur at Beth El

#### Congregation Beth Chaverim (Reform)

Located in Sun City West, Congregation Beth Chaverim formed just three years ago. Staffed with a part-time rabbi, the congregation is almost entirely comprised of seniors. The congregation of 75 members meets twice each month (Friday nights) in a room at the Sun City West Community Foundation building. Membership dues are quite modest as there is no building fund.

Beth Chaverim occasionally hosts social events for its members.

#### Sun Lakes Jewish Congregation (Reform)

Sun Lakes Jewish Congregation (SLJC) is ten years old and shares space with other (non-Jewish) congregations at the Sun Lakes Chapel. The congregation is served by a part-time rabbi, is almost entirely comprised of seniors, and presently has a membership of approximately 500 individuals. Services are held twice each month (Friday nights) for five months of the year, and once each month for the remaining months. On average, two to three hundred people attend Friday night services.

SLJC has many committees, a Men's club and a Sisterhood.

#### Beth Ami Temple (Reform)

Located in Paradise Valley and in existence since 1978, Beth Ami Temple's membership niche is active adults, 50 and older. Beth Ami's present membership is about 100 individuals, almost all are over 50 and more than half are over 65. Services are held every other Friday night, September – May, at a Presbyterian Church. Annual dues are modest as there is no building fund.

Beth Ami aims to serve its members spiritual and social needs. To that end they host many interest groups, including:

- Dinners
- Discussions/speakers
- Movies
- Hiking/walking
- Travel
- Wellness
- Mah jongg
- Culture

Beth Ami members also engage in community social action activities.

### Desert Foothills Jewish Community Association (Unaffiliated)

Desert Foothills Jewish Community Association (DFJCA) is presently the only known active Jewish congregation in the North Scottsdale/Carefree/Cave Creek area. Services are held once each month (Friday nights) at the Community Center in the residential community of Terravita, located near the border between Scottsdale and Carefree. Members generally live in the Northeast Valley. Some members are snowbirds and almost all are seniors. Membership dues are extremely low (no building fund) and many years ago the congregation was referred to as “Jews without Dues” or “Jews with no Dues” as there were literally no dues at one time.

After Friday night services DFJCA always has a program such as a speaker, film, live music, etc. Topics can be educational or for entertainment. DFJCA also hosts a garden party and a picnic each year for its members, spring and fall, and offers opportunities to participate in community social action activities. DFJCA tries to find rides for members needing transportation to attend services.

### Beth Emeth Congregation of the West Valley (Conservative)

Located in Sun City West, Beth Emeth Congregation has been located at its present location as a full service synagogue since 1987. Drawing members from all over the West Valley, Beth Emeth’s congregation is largely comprised of seniors.

In addition to a full array of religious services and programs, Beth Emeth also offers:

- Men’s Club (with annual golf outing)
- Sisterhood
- Annual lecture series
- Weekly bereavement support group
- Book club

Beth Emeth also provides opportunities to engage in community social action activities and is used as a satellite location for BJE’s adult education programs.

### Temple Beth Shalom and Jewish Community Center (Reform)

Established more than 45 years ago, Temple Beth Shalom is a full service synagogue located in Sun City. Members come from all over the Northwest Valley and the majority are seniors.

In addition to a full array of religious services and programs, Beth Shalom also offers:

- Sisterhood
- Brotherhood
- Adult education and lecture series
- Support groups
- Caring committee (to respond to the needs of vulnerable congregants)
- Musical events
- Luncheons

- Trips, cruises and other social events

Beth Shalom also offers opportunities to engage in community social action activities and is used as a satellite location for BJE's adult education programs.

#### Religious Services in Senior Residences by Hannah Adelman (Unaffiliated)

For the past 15 years Hannah Adelman, a local Jewish woman who is a religious school teacher with experience in activities coordination in health facilities, has been providing lay-led Sabbath and Jewish holiday services in many senior living residences throughout the Phoenix Valley. Presently she provides these services in 14 different facilities, free of charge, serving approximately 150 Jewish residents each month in independent or assisted living.

Ms. Adelman has made her services available to many senior residential facilities over the years. She has continued with facilities where five or more people attend services. The services are open to any resident interested in attending, including non-Jews. Services are tailored to older adults: a 16-page, large print prayer book is utilized, along with melodies and chants familiar to the "older generation," and no one stands during prayers unless he or she wishes to do so.

A recent collaboration with Temple Kol Ami has resulted in children and their parents creating gift bags and greeting cards for Ms. Adelman to distribute to Jewish senior residents. Additionally, Kol Ami has partnered with Ms. Adelman to contribute their "Minyan Makers," four volunteers who accompany her to participate services (ideally to make a minyan). An oneg is also provided after the service, with assistance from Kol Ami volunteers who bring food and napkins.

Ms. Adelman's services have the added value of socialization opportunities for Jewish seniors at residential facilities.

#### Congregation Or Tzion (formerly Har Zion Congregation and Congregation Or Chadash) (Conservative)

In July 2014, Har Zion Congregation and Congregation Or Chadash merged to become Congregation Or Tzion. The merged congregation is searching for a new location in North Phoenix/North Scottsdale and is presently using the facilities of both former congregations in Scottsdale. It is expected that Or Tzion will have 500 family and/or individual members.

Earlier in the course of this Study (prior to the merger of these congregations), interviews were conducted individually with Har Zion Congregation and Congregation Or Chadash. It is not yet known which programs (mentioned below) of Har Zion and Or Chadash will continue, change, or cease as a result of the merger.

**Har Zion Congregation** was a full service synagogue with a membership of more than 140 families, more than half of which were seniors. In addition to a full array of religious services and programs, Har Zion also offered:

- Sisterhood (offered rides to those needing transportation)

- Men's Club
- "Nosh and Knowledge" program
- "Torah Meets Chair Yoga"
- Book Club
- Yiddish Club Lunch & Learn series
- Adult chavurot
- Mah jongg
- Cultural events
- Bikur cholim (tended to the needs of the sick and vulnerable)

**Or Chadash** was a full service synagogue formed in 2002 with a membership of over 400 families with a decidedly younger demographic. Only about 10% were seniors. In addition to a full array of religious services and programs, Or Chadash offered the following activities that served or appealed to seniors:

- "Socialights" group - met once each month for social events; participants are primarily seniors
- Sisterhood
- Bikur cholim
- Opportunities to become involved with social action activities in the community

#### Temple Solel (Reform)

Located in Paradise Valley, Temple Solel is a full service synagogue with a membership of approximately 650 households, 35% of which are senior households. In addition to a full array of religious services and programs, Temple Solel also has programs and clubs that are largely comprised of or attract seniors, such as:

- Caring Committee - emotional, physical and spiritual outreach to those who are vulnerable (in hospitals, nursing homes, bereaved, etc.) by volunteers who make phone calls, hospital visits, cook and deliver meals, give rides and send cards. Many seniors are recipients and volunteers.
- Social Action – engaging in activities that help the needy, spread good will, and advance social justice in the local community and beyond
- Pathways Group – comprised of almost entirely seniors, a social, educational and recreational group to foster connections and friendships
- Knitting for a Purpose (finished products are donated to a cause/organization)
- Yiddish Club
- Rosh Chodesh (Women's Group) – comprised mostly of seniors, group meets monthly to socialize and discuss topics of interest
- No Boys Allowed – multigenerational group of women who have casual social gatherings
- The Men's Group – social and philanthropic activities, including Men's Poker Night
- Book Club (mostly seniors)
- Connection Team – Engaging in social activities that can create a sense of community, such as
  - Diners' Club
  - Movie Club

- Chavurot
- Mah jongg
- Bridge
- Hiking Chavurah
- Empty Nesters (social meetings)

### Congregation Beth Israel (Reform)

Among the oldest and largest congregations in Greater Phoenix, Congregation Beth Israel (CBI) has been a full service synagogue since 1920. Originally located in the heart of the historic Jewish community in Central Phoenix, CBI moved to its present location in Scottsdale in 1997. CBI continues to own and manage the Beth Israel Memorial Cemetery in Central Phoenix, which has sections designated for Orthodox, Conservative, Reform and unaffiliated families.

CBI presently has a membership of approximately 700 families, 30% of which are seniors. In addition to a full array of religious services and programs, CBI also has programs and clubs that are largely comprised of or attract seniors, such as:

- BITS (Beth Israel Temple Seniors) – a social group that offers outings, lunches and dinners, etc.
- Shabbat After Hours – one Friday each month a place to gather is selected for socializing (a large number of seniors participate)
- Women’s Book Club (monthly meetings)
- Weekly card groups
- Lunch & Learn with the Rabbi – attended almost entirely by seniors; held once or twice each month
- Educational programs (one-time) – often with topics of interest to seniors
- Welcome Home Project – includes a Rachamim Team (similar to bikkur cholim), CBI volunteers organize visitation, support and assistance to those who are ill, hospitalized or homebound
- Mitzvah Project/Social Action Committee

### Beth Joseph Congregation (Orthodox)

Founded in 1965, Beth Joseph Congregation (BJC) is a full service synagogue located in Central Phoenix. Approximately one-third of its 450 member families are seniors. The number of elderly has been increasing over time, as has the number of youth. The Phoenix Hebrew Academy is located on the same campus with BJC. In addition to a full array of religious services and programs, BJC also offers the following activities that may benefit or appeal to seniors:

- BJC Jewish Enrichment Center
  - Yoga for women
  - Rosh Chodesh Women’s Luncheons
  - Bananagrams and More – a game and social club for women
  - Men’s Club

- Jewish Book Club
- Bikur cholim

BJC used to have female volunteers who went to the Kivel Campus of Care weekly to visit Jewish residents. This service no longer exists.

#### Temple Emanuel of Tempe (Reform)

Founded in 1976, Temple Emanuel of Tempe is a full service synagogue with a membership of 550 families, approximately one-third of which are seniors. The age structure of the congregation's membership has changed little over the years. In addition to a full array of religious services and programs, Temple Emanuel also offers the following activities for, or of interest to, seniors:

- Emanuel Seniors – two social programs each month, one with the rabbi and one with another speaker, including films and lunches
- Yedidim (Empty Nesters) – social group that meets monthly for dinner and conversation
- Women's Book Group – monthly meetings, September – May
- Yarn Yentas – a knitting group that meets weekly, with projects to donate items to the homeless
- Sisterhood
- Men of Emanuel
- Chavurot
- Giving Circle (women meet monthly to discuss ways of helping those in need in the larger community)
- Hiking Club

Temple Emanuel has hosted Medicare experts to provide free consulting services. Additionally, they do web streaming of their religious services (can be viewed via the internet), and provide assistive listening devices or sign language interpreters upon request.

#### Temple Chai (Reform)

Located in Northeast Phoenix and the largest Jewish congregation in Greater Phoenix, Temple Chai has a membership of 825 families, approximately 25-30% of which are seniors. It is a full service synagogue and includes a unique community resource, the Deutsch Family Shalom Center at Temple Chai (described below). In addition to a full array religious services and programs, Temple Chai offers the following activities for, or of interest to, older adults:

- Dor L'Dor – a social and educational program for those 49 and older. Most attendees are over 70. Monthly meetings are held November - May and include a luncheon (\$10 for Temple Chai members and \$12 for non-members). Attendance is typically between 30 and 60 individuals.
- Center for Tzedakah and Social Justice – activities to assist those in need and improve the community
- SALAAM-CHAI PARADISE – an interfaith outreach program with joint community programming

- Bat Chai – a women’s group
- Chai Men’s Club
- Chavurot

The Deutsch Family Shalom Center at Temple Chai

Founded in 1996, the Shalom Center provides educational programs, support groups, and spiritual development to promote growth, healing and wholeness. All Shalom Center programs are open to members of the public with the exception of the Elisa Lanes Caring Community. Most programs and services are offered at no charge, with the exception of some support groups and conferences that have very modest fees.

- Elisa Lanes Caring Community - a network of committed volunteers (members of Temple Chai) who visit and comfort the sick, bereaved, or lonely (mostly Temple Chai members).
  - Bikkur Cholim – special training for Caring Community volunteers
- Elisa Lanes Healing Series - educational and artistic projects several times a year
- Lectures and Conferences - topics frequently pertain to aging issues
- Shacharit Meditation Services – monthly services (half of the participants are seniors)
- Life Transition Support Groups - bereavement, caregivers, divorced/separated/widowed
- Healing Handiwork, Knitting with Kavannah, Cooking with Kavannah - gatherings and projects to create Jewish handicrafts, healthy meals, and items of comfort for congregants and others in need (participants are mostly seniors)
- Clothing Lives On – provides assistance (from volunteers) to bereaved families to help sort and donate clothing and accessories of a loved one who has passed away
- Information and Referral – linking individuals facing difficult issues to services and community organizations with resources and solutions

### C. Perceptions and Opinions of Local Stakeholders

In addition to evaluating relevant demographic and needs assessment data, and the landscape of local older adult services, a third tack was taken to identify the most pressing needs of Jewish seniors.

Perceptions and opinions of the following groups of people were sought:

- xi. Seniors (age 65+) and Baby Boomers (age 49 – 66)
- xii. Family caregivers
- xiii. Rabbis
- xiv. Senior services providers and practitioners
- xv. Local experts in the field of aging services

A summary of the most common themes to emerge from all of the groups listed above is presented at this end of this section.

**i. SENIORS (65+) AND BABY BOOMERS (49 – 66)**

Multiple methods were used to gather the thoughts and perceptions of Jewish seniors and Baby Boomers in Greater Phoenix. This section includes summaries and results of:

- the 2011 “Jewish Community Conversation”
- focus group meetings
- a hard copy questionnaire
- one-on-one interviews and conversations

**a. “Jewish Community Conversation”**

Prior to initiating this Study, in September 2011, a “Jewish Community Conversation” was convened by the Jewish Community Foundation of Greater Phoenix. Its aim was to gather individuals in the local Jewish community to share thoughts and perceptions about Jewish communal needs and to offer constructive solutions. Breakout sessions were offered on 18 different topics, including three directly relevant to the subject matter of this Study: Senior Adults, Social Services, and Volunteering.

While 340 people attended the “Conversation” event, it is not known how many participated in the Senior Adults, Social Services or Volunteering breakout sessions. A post-event survey of the “Conversation” attendees yielded 157 responses. Demographics of the respondents indicated 42% were 60+ years of age and another 19% were 50+. The majority of attendees therefore, based on those who responded to the survey, were Baby Boomer age and older.

The following lists are relevant comments received from those who attended the Senior Adults, Social Services and Volunteering breakout sessions.

Needs of Older Adults

- Transportation to medical appointments, evening activities, and synagogue services
- Senior day care programs for healthy seniors
- More assisted living facilities, possibly Jewish group homes
- Jewish skilled nursing facility
- Senior residential facility in north Scottsdale or Phoenix that serves average income Jewish seniors, not just low-income
- Help for older adults to remain independent in their own homes

Suggestions For Constructive Solutions

- Task force for senior services
- Synagogues should use the model of churches who create programs to help seniors
- Web portal specifically for seniors
- Communication vehicle for seniors who don’t use the internet
- JFCS could become a clearinghouse for senior programs and activities, Valley-wide
- Create a Jewish senior resource list, including Alzheimer’s programs specifically for Jews

- Use senior gatherings and events as an opportunity to ask if people know seniors who need help
- Volunteer concierge service to match volunteers with needs
- Disseminate, across organizations and community, a list of volunteer opportunities (similar to a jobs board)
- Work/partner with non-Jewish agencies; utilize the best resources possible regardless of Jewish label

General Comments

- Need a demographic survey of the Jewish community and a social services needs assessment
- Misconception that widows and widowers have money - many don't and they restrict their spending on social activities (deemed a low priority) which can lead to loneliness
- 2,000 or more Jewish seniors are isolated from the Scottsdale center (of Jewish activities)
- New models are needed for nursing facilities
- Look at similar Jewish communities: how do they succeed in helping older adults?
- The elderly are invisible to younger people and they don't know what seniors need; elders need more contact with young people, including high school students
- Need to keep the elderly peer community together and engaged in Jewish life

**b. Focus Groups**

Five focus groups were held during the fall of 2013 Greater Phoenix. All focus group meetings were advertised via relevant organizations and synagogues.

Summary of Focus Group Meetings

<b>Date</b>	<b>Location/Event</b>	<b>Target Audience</b>	<b># of Participants</b>
10/27/13	Valley of the Sun JCC – Monthly Café Europa Gathering	Holocaust survivors	40
11/6/13	Sierra Pointe Senior Residence, Scottsdale	Independent Living residents	24
11/14/13	Valley of the Sun JCC, Scottsdale	Baby Boomers	7
11/18/13	Interfaith Chapel, Sun Lakes	Seniors	9
11/23/13	Temple Beth Shalom, Sun City	Seniors	3

- **Holocaust survivors/Café Europa** – More than 40 seniors participated in the focus group held at the monthly Café Europa event of the Phoenix Holocaust Survivors' Association (not all participants were Holocaust survivors), held at the Valley of the Sun Jewish Community Center in Scottsdale.

- **Senior Living Residence** – The independent living facility of Sierra Pointe (in Scottsdale) was selected as a focus group location due to its significant percentage of Jewish residents (believed to be 50%). Twenty-four residents participated in the meeting and most were believed to be Jewish.
- **Baby Boomers** – Seven individuals participated in this focus group and five were believed to be Baby Boomers. The meeting was held at the Valley of the Sun Jewish Community Center in Scottsdale.
- **Sun Lakes** – Nine older adults participated in the focus group held at the Interfaith Community Chapel in Sun Lakes, a large 55+ “active adult” retirement community in the Southeast Valley.
- **Sun City** – Three older adults participated in the focus group held at Temple Beth Shalom in Sun City.

The following questions were posed to focus group attendees:

- What kinds of services do you think are most needed by older adults (65+) in our community?
- What kinds of services do you believe are desired specifically by *Jewish* older adults?
- (At Boomer meeting only) What kinds of services do you believe are desired specifically by *Jewish Baby Boomers* in our community?
- What kinds of services do you believe are lacking or need to be improved?
- Do you believe there are barriers to seeking or receiving services? If so, what are they?
- What ideas do you have to improve services for Jewish seniors in our community?

Responses and comments from focus group attendees sometimes strayed from the specific questions posed. Nonetheless, a summary of comments received, roughly organized by questions posed, follows.

#### Summaries of Comments Received at Focus Groups (excluding the Baby Boomer meeting)

##### Services Most Needed for Seniors (65+)

- Transportation options
- Socialization/relief from loneliness
- Information on community services and resources/knowing where to turn
- Affordable senior residential options
- Intellectual and Jewish educational/learning opportunities, particularly beyond the Northeast Valley
- Opportunities for meaningful engagement (volunteer work)
- Emergency respite care options

##### Obstacles/Barriers to Providing Services to Jewish Seniors

- Geography – distance to services and events; Jewish seniors are spread out
  - Lack of transportation to services and events

- Technology – not everyone uses the internet or texting
- High cost for services (e.g. residential facilities, home care)
- Many Jewish congregations reach out to young families much more than they reach out to seniors
- Some communities are not pedestrian-friendly
- Lack of information/awareness of programs and services
- Physical/health limitations to participating
- Personal hesitancy to become involved
  - Many activities oriented to couples; single people feel uncomfortable
- Some Jewish congregations are not welcoming to seniors' interfaith marriages

#### Ideas for Improving/New Services

- Acquiring small vans for transportation needs
- Provide seniors with discount coupon booklets for area restaurants
- More intergenerational and interfaith programming
- More intellectually stimulating programming (“please don’t ‘dumb it down’”)
- Jewish community organizations need to make their programs and services mobile to reach people beyond Scottsdale and Phoenix, in many locations around the Valley (perhaps establish a satellite office in the West Valley)
- Southeast Valley needs a senior center (the only one close to Sun Lakes is church-affiliated)
- Jewish “welcoming committees”-outreach for new residents in active adult communities and senior facilities
- Consider establishing an affordable Jewish CCRC (continuing care retirement community) in the West Valley

#### Additional Comments

- West Valley not receiving many supportive, educational or recreational services from Jewish community
  - “What goes around comes around; if the Federation (Jewish Community Association) wants support from seniors it needs to offer something in return”
  - The JCA needs more of a presence in the West Valley
- Residents in senior facilities, particularly those without local family, need support when they are ill or ailing
- Some existing programming is underutilized
- There is a growing Jewish population in Buckeye, Litchfield Park and Goodyear

## Summary of Comments Received at *Baby Boomer Focus Group*

### Services Most Needed for Seniors (65+)

- Aging-in-place supportive services (in-home assistance, transportation, etc.)
- Socialization opportunities
- Single source of information on community services/resources
- Health and wellness programs that are age-specific/appropriate
- Jewish senior housing options not tied to income level (e.g. not a HUD facility like Kivel)
- Affordable senior residences
- Day programs for Jewish seniors who have physical and/or mental impairments

### Services Desired by Baby Boomers

- Meaningful volunteer opportunities and options for community involvement
  - Need something to look forward to, “a reason to get out of bed in the morning”
- Age specific/appropriate physical activities (e.g. not chair yoga, which is more appropriate for older seniors)
- More and varied education classes, not just on religious topics
  - Classes on how to prepare to care for your aging parents

### Obstacles/Barriers to Providing Services to Jewish Seniors

- Geography – Jewish population spread out; services and programs can be too far away
- Lack of transportation, including limited paratransit options
- Lack of awareness of services, programs and what is happening
- Programs held at night (many cannot drive; too late)

### Ideas for Improving/New Services

- Do outreach to Jewish seniors and Boomers about available services and programs
  - Create directory of services/resources for Jewish seniors and Boomers
  - Create special section in the Phoenix Jewish News (a “senior page”) to keep people informed
  - Utilize Arizona Jewish Life magazine for similar purpose
- “Take the show on the road” – move programs and services around the Valley
- Create senior “play dates,” to connect people to have fun
- Arrange with Arizona State University to have seniors audit classes (for free)
- Educate seniors on directing their own health care, proactive self-care management

### Additional Comments

- JCC (Scottsdale) has cut down on its programming for older adults

### c. Hard Copy Questionnaires

Printed questionnaires were distributed or made available to Jewish older adults, Baby Boomers, and family caregivers of older adults. Questionnaires were made available via:

- All focus group meetings
- Select Bureau of Jewish Education adult learning classes
- “Jewish Women’s Symposium, On the Cutting Edge,” a Bureau of Jewish Education seminar on 11/3/13 at the Valley of the Sun JCC
- a JCA Women’s Philanthropy event on 10/30/13 at the Valley of the Sun JCC

Fifteen completed questionnaires were received (six from older adults and nine from Baby Boomers) and the summary of comments follows. A condensed version of the questionnaire can be found in Appendix 6.

#### Summary of Responses

\*\* Comment was received by two or more respondents

##### Most Needed Services for Seniors (65+)

- \*\* Transportation (listed by every respondent)
  - to Shabbat and holiday services, and Jewish programs
- \*\* Assistance with technology and new communication devices – how to use, what to buy, etc.
- \*\* Financial assistance (drug costs, medical expenses, housing, etc.)
- \*\* Affordable housing
  - Low-income options
  - Reasonably priced independent and assisted living facilities (that offer intellectual activities, arts and crafts, outings, etc., and don’t cost a fortune)
- \*\* In-home supportive services
  - Personal care
  - Paperwork
  - Home maintenance/repairs
  - Home health and therapies
  - Home delivered meals
- \*\* Community education about available programs and services, especially about services available from JFCS
- \*\* Stimulating adult education classes and lectures, including book clubs and health seminars
- Good quality memory care programs at reasonable prices

- Adult day services
- Assistance with medical claim forms (difficult to understand)
- Case management
- Assistance with financial planning
- Socializing opportunities
- Physical activities – such as dancing, exercise classes
- Fitness classes for adults with disabilities
- Checking on older adults to see if they are okay or if they need anything
- Mental health counseling for seniors/Holocaust survivors with PTSD (post-traumatic stress disorder)
- Grief support
- Classes and support for coping with disabilities
- Recognition of and help for all forms of domestic abuse in Jewish senior homes
- Multi-generational activities through synagogues
- Jewish seniors need singles groups

#### Obstacles/Barriers to Providing Services to Jewish Seniors

- \*\* Transportation
  - No transportation to the Scottsdale JCC
  - Lack of transportation in general to get to programs and services
- \*\* Requiring technology – many seniors do not text, use cell phones or computers
  - Many websites are too confusing for seniors to use
  - The days of using the “Yellow Pages” are over
- \*\* High cost of services (real or perceived)
  - Financial requirements to qualify for programs or assistance
- \*\* Shame (stigmas around asking for help, being a victim, etc.) and fear
- \*\* Scheduling programs at night
- Most social events in the Jewish community are geared toward younger people with children

#### Ideas for Improving/New Services

- \*\* Transportation to the JCCs
  - Create a shuttle service to the JCCs
  - Have JCCs facilitate carpooling arrangements based on where people live
- \*\* Volunteer assistance
  - Duet and Neighbors Who Care are models for volunteer assistance that should be replicated in some way in the Jewish community

- Have the JCA and JCCs recruit volunteers of all ages to help with programs (have sign-up sheets available in lobbies of JCCs as well as on websites)
- Retired people have time and want to feel useful (create a coordinated system for matching people's interests/skills with other people's needs)
- \*\* Need a Jewish publication to inform people about services and resources (especially 24/7 help lines)
  - Provide Medicare information
  - Have people contact Area Agency on Aging for assistance
- Create a new nonprofit organization, or a division of an existing nonprofit, specifically to address needs of seniors
- Get people to use the BJE library
- Social activities can be incorporated into classes already offered to adults
- Offer discounts or free admission for seniors at Jewish events
- Have support agencies communicate directly with adult children/caregivers

Additional Comments

- Seniors tend to be lonely, especially those without family nearby to comfort or visit them

**d. One-on-One Interviews and Conversations**

One-on-one interviews and conversations occurred with 17 Jewish older adults (65+) and 21 Baby Boomers throughout the Phoenix metropolitan area. These sessions were both scheduled and unscheduled (happenstance), and occurred in-person, by telephone and, occasionally, via email. Questions posed to interviewees were, more or less, the same as those used in the hard copy questionnaires.

Common Themes from Interviews and Conversations with Jewish Older Adults

- Transportation options are lacking for all purposes (medical, errands, social, recreational, etc.)
  - Paratransit (via Dial-a-Rides) is difficult (wait times, need to transfer, etc.)
  - Cannot get to senior centers
- Lack of knowledge about the services and programs available
  - Little knowledge about JFCS programs and services, and eligibility criteria
- Need for affordable medical services and prescription drugs

- Need for affordable in-home services (housekeeping, personal care, home maintenance/repair, etc.)
- Socializing opportunities and home visitation are needed to address loneliness and boredom
- Seniors need a lot of help with technology and how to use all the new gadgets
- Very few quality memory care programs available, especially for those with early onset and in the early stages of disease
- West Valley seniors receive very few Jewish services; most educational and cultural programs occur in Scottsdale or Phoenix
- Programs scheduled at night are not appealing to many seniors
- Helping the “shut-ins,” homebound seniors are most important, especially those with no local family
- There are generally two groups of seniors, “those who are well and active and those who are frail and inactive,” and the Jewish community should acknowledge and provide services for both groups
- Need more ways to connect “Jewishly” beyond synagogue affiliation (many seniors choose not to join congregations due to transportation logistics, cost, or lack of appeal for any number of reasons)
- Need some kind of “Jewish community welcome wagon” for newly arrived seniors (those who retire to the Phoenix area, move into 55+ communities, senior residences, etc.) to provide information on
  - the area
  - programs and services (including those for seniors)
  - give people personal contacts (actual human beings)
- “Where are the adult day health facilities?”
- Kosher food should always be an option at events and facilities
- Does not feel like the Jewish community is “taking care of its own,” where seniors are concerned

#### Additional Common Themes from Interviews and Conversations with Jewish Baby Boomers

- Meaningful volunteer opportunities and truly engaging activities are needed (need to go beyond mundane volunteer “lobby greeter” duties and senior bingo)
  - The community should be utilizing the talents and intelligence of young retirees
- Jewish community organizations need to help facilitate social connections for seniors of all ages
- Need information and assistance for caring for elderly parents
- Older adults need information and support for dealing with their adult children who have “problems”
- Tap into the reality that most older Jews moved to the Phoenix area from somewhere else; create programming that acknowledges and allows for affiliation with places of origin

## ii. FAMILY CAREGIVERS

One-on-one interviews and conversations occurred with 15 family caregivers (eight Baby Boomers and seven older adults) residing throughout the Phoenix metropolitan area. Three of the older adult caregivers were or had cared for a spouse. The balance of those interviewed were or are currently caregivers of elderly parents. Most of those interviewed were caring for a spouse or parent with some degree of dementia.

These interviews were both scheduled and unscheduled (happenstance), and occurred in-person, by telephone and, occasionally, via email. Questions posed to interviewees were adapted from those used in the questionnaires, but also highly tailored to the interviewee's personal situation.

The most common themes to emerge from the interviews and conversations with Jewish family caregivers were:

- In-home care is very expensive
  - Unable to afford home care, caregivers often must provide services themselves
    - Frequently leads to caregiver depression, exhaustion, illness, anger, marital/relationship strains, loss of social life, damage to work and career, etc.
- Quality of In-home care services is sometimes marginal
  - Aides sometimes don't mesh well with client
  - Aides sometimes show up late, leave early, or cancel at last minute
  - Managing/overseeing in-home services can be very frustrating/difficult for caregivers
- Respite care is very expensive (in-home and at a facility)
- Not many adult day health programs in Greater Phoenix
  - They can be far away
  - Expensive, if utilized often
  - Some of the programming caters to a common denominator that is "not suitable for my parent/spouse"
- Need more information about supportive services for caregivers, including:
  - Free caregiver trainings and workshops – when, where, etc.
  - Assistance with respite care (including subsidy programs)
- Service providers need to address differences in caregivers who:
  - Live far away (and provide care "remotely") versus live locally
  - Have short-term caregiving responsibilities versus must provide care for very extended periods of time (many years)

### iii. RABBIS

Extensive interviews were conducted with area rabbis to learn, from their experience and perspectives, what they believe are the most important unmet needs for Jewish older adults. While it was not possible to interview all rabbis in Greater Phoenix, an attempt was made to speak with many who have led congregations with a notable number of older adults as well as those who may have additional experience with the varied needs of Jewish seniors. All but two of the interviews were conducted in-person. Appendix 3 lists the 14 rabbis and congregational leaders interviewed.

The most common themes, *expressed by two or more rabbis*, to emerge from the interviews were:

#### Most important unmet needs for Jewish older adults

- Transportation – biggest need
  - key to connecting to Jewish community
  - can't attend Jewish programs without a ride
  - key to addressing social isolation
  - taxi programs are more effective than mini-buses
- Meaningful opportunities for engagement and volunteer work
- Social programs to address loneliness and isolation, particularly for the homebound
- Need community-sponsored Jewish CCRC (continuing care retirement community) or, at a minimum, a Jewish assisted living and skilled nursing facility (SNF)
  - Financial assistance should be available for the SNF, as an alternative to Medicaid
- Multi-generational programming
- Congregate kosher meals at a synagogue or community center (socializing opportunity)
- Jewish senior center type of environment/facility, with hot kosher meals
- Kosher home-delivered meals for the homebound

#### Other thoughts about the needs of Jewish older adults

- Majority of Jewish seniors do not have family members living locally and, consequently, they are more vulnerable
  - community/organizations must step in
- Sense of purpose and being needed is exceedingly important for seniors – need to provide opportunities for contributing

- Religion can provide purpose and sense of worth, and is low cost
- Financial concerns are an obstacle to Jewish seniors participating in congregational life
- Leadership is lacking in Jewish community and affects the ability to address older adult issues
- Jewish campus in Scottsdale requires most of the Jewish community's resources; the rest of the Greater Phoenix area is relatively ignored, except when soliciting donations
- Kosher food should be served by all Jewish organizations
- Fresh, hot Kosher meals are not available for delivery in central Phoenix

Additional, but less common (*heard from only one rabbi*), comments included:

Most important unmet needs for Jewish older adults

- Need several smaller, affordable (not high-end) Kosher residential group homes throughout the Valley
- Outreach to Jewish seniors is needed (the information must be brought to them) about services and programs
- Assistance with navigating the options and systems for services
- Home care and respite care
- Assessments of seniors' well-being and safety of home environment
- Baby Boomers and younger seniors - engage and invite their service (they are capable and have time)
- Home repair and maintenance programs
- LGBT senior housing is lacking
  - Is Kivel trained in providing for LGBT residents?
- Better awareness of services and community resources, and how to access them, is needed

- Financial assistance to needy seniors

#### Other thoughts about the needs of Jewish older adults

- Social stigma about being in need; Jewish seniors are often silent when they need help
- Rabbis don't visit people living in senior residences, whether former congregants or not
  - Rabbis need forwarding information about their congregants who go to live in senior facilities; rabbis should follow up to keep them "in the loop" Jewishly and otherwise
- Jewish community should be doing outreach to senior centers and residences to bring in Jewish programming
- This community has more of a Jewish patina than a Jewish essence
- Chris Ridge Senior Enrichment Center is a substandard senior center program/facility
  - Need for a quality multi-generational Jewish community center in central Phoenix
- Hospital chaplaincy is pretty well covered: JFCS rabbis alert appropriate congregational rabbis when a member is in hospital
- Community hospital chaplaincy program is insufficient – it is a stop-gap measure, reactive, and only covers 11 hospitals with once/week visits
- Jewish seniors are concerned about outliving their financial resources
- Making and keeping friends when elderly is a big concern
- If the Jewish community does not meet the needs of its seniors, entrepreneurs will jump in and fill the gap
- Some Jewish seniors in Sun City, Sun City West, central Phoenix, Mesa and Chandler are struggling financially
- Outreach to Jews in the Southeast Valley is lacking
- More Jewish retirees are relocating to Arizona from the Northeast (not just the mid-West)
- Sun Lakes Jews feel detached from the main/central Jewish community of Greater Phoenix

- Cohesiveness is lacking in the Jewish community
- Many adult children of Jewish seniors do not participate in their parents' care
- Some seniors deprive themselves in order to help their children, financially and otherwise
- People need to ask for help (or be noticed for needing help); then they must accept the help
- Why do cities of comparable Jewish populations fare better where seniors are concerned?
- Congregational nurses or social workers can be funded with a combination of JCA and congregational monies
- Seniors tend to be well and active or ill and disabled; much more challenging and costly to deal with the latter group
- The Jewish community sometimes spends more money and time supporting its buildings than the people in them
- There should be one central coordinating body for all Jewish senior issues
- Professional volunteer organizing and training is lacking in the Jewish community
- Resources are not being leveraged to meet the needs
- The measure of a community's ethical behavior is not how much money it raises or its attendance at events, but how it treats the community's voiceless, invisible and less fortunate

iv. **SENIOR SERVICES PROVIDERS AND PRACTITIONERS**

During the course of interviewing service providers for the Landscape of Local Senior Services section of this Study (Jewish organizations, governmental and nonprofit organizations), questions were posed to individual practitioners to learn their personal and professional opinions about seniors' needs and ideas for improving service delivery/quality of life for seniors. Many additional senior services practitioners were interviewed to learn their thoughts and perceptions, even though their for-profit businesses were not included in the Study. These additional practitioners represented the following categories of service providers:

- Home care companies
- Senior residences
- Residential placement services for seniors
- Elder law attorneys

In total, perceptions and opinions were gathered from 37 senior services providers and practitioners. Below is a summary of their comments.

<b><u>Most Important Unmet Needs of Seniors</u></b>	<b><u># who noted this need</u></b>
<ul style="list-style-type: none"><li>• Transportation</li></ul>	15
<ul style="list-style-type: none"><li><ul style="list-style-type: none"><li>○ Dial-a-Ride services do not cross jurisdictional boundaries</li><li>○ Sun Lakes lacking public transportation services (including paratransit)</li><li>○ North Scottsdale lacking all transportation services</li></ul></li></ul>	
<ul style="list-style-type: none"><li>• Socialization for those who are isolated and lonely</li></ul>	10
<ul style="list-style-type: none"><li><ul style="list-style-type: none"><li>○ especially those without children or whose children are not local</li><li>○ particularly for those aging in place (not living in retirement or senior communities)</li></ul></li></ul>	
<ul style="list-style-type: none"><li>• Awareness of and understanding about available senior services</li></ul>	7
<ul style="list-style-type: none"><li><ul style="list-style-type: none"><li>○ Educational information on<ul style="list-style-type: none"><li>▪ Legal documents</li><li>▪ Residential options for seniors</li><li>▪ Home care</li><li>▪ Hospice</li><li>▪ Long-term care planning</li><li>▪ On being or (one day) becoming elderly</li><li>▪ caring for elderly parents</li></ul></li><li>○ There is no central point for information on all senior services</li></ul></li></ul>	

- In-home services and supports 7
  - affordable/subsidized home-care services
- Adult day centers 5
  - lacking in north Scottsdale/Carefree/Cave Creek
  - affordability is a problem/need subsidized programs
- Vulnerable/isolated elderly need an advocate (including when residing in skilled nursing facilities) 4
- Food/nutrition – seniors who cannot not eat properly (for many reasons) 4
  - subsidized meals
  - insufficient home-delivered meals resources and no congregate meal sites in North Scottsdale/Cave Creek/Carefree area
- A Jewish/kosher CCRC (continuing care retirement community) or, at a minimum, a Jewish/kosher long-term care facility 4
- Sufficient volunteer services 4
  - need more funding to develop/run programs and recruit volunteers
  - insufficient availability of volunteers during summer season
- Jewish senior center 3
  - centrally located (the Chris Ridge Senior Enrichment Center does not provide sufficient programming)
- Senior housing 3
  - affordable group homes (particularly with dementia care)
  - affordable housing in general, in north Scottsdale/Carefree/Cave Creek
  - creative options, such as co-housing (with communal supplies and amenities), intergenerational housing, etc.
- Respite care – affordability is a problem/need subsidized programs 2
- Financial assistance (many seniors are hurting today, financially) 2
- Case management and services coordination 2
  - for seniors with no local adult children
  - for seniors in north Scottsdale/Carefree/Cave Creek
- Intergenerational programming (including friendly visiting services) 2

- Well-run, high caliber adult education classes available through the Bureau of Jewish Education and the Valley of the Sun JCC 1
- Providing meaningful and dignified activities for seniors (at senior centers, adult day centers, senior residences, etc.) 1
- Too many Jewish seniors are not connected to synagogue life 1

**Ideas for improving/creating new services** (no more than one person offered each idea)

- Nursing liaison services in independent living residences
- Create a Senior Education Center (to help older adults explore their options and to plan for their needs - financial, medical, residential, etc.)
  - Could be incorporated into a senior center or synagogue
  - Should be available in different parts of the Valley
- Newspapers should run weekly articles or create sections on senior issues
- Jewish community could invest in some buses for senior transportation
- Multi-generational housing (e.g. pair seniors with special needs kids)
- Create a “Jewish Duet” – an organization to assist Jewish seniors still living in their own homes through the services of trained volunteers
- Synagogues can emulate churches that create drop-in adult day centers
- Create a senior campus or building on the Ina Levine Jewish Community Campus in Scottsdale (to include a senior center and CCRC)
- Create ITN (Independent Transportation Network) programs, or something based on that model (see Innovation Services Section for details on ITN)

**Other comments** (no more than one person offered each comment)

- Community partnerships are key to maximizing capacity to provide services
  - Government – nonprofit organization partnerships can bridge gaps

- Oversight boards or steering committees should be comprised of those with knowledge and skills in senior services, not those who “know the right people”
- Everyone needs to do their part; with luck all of us will be seniors one day
- Jewish community organizations have high staff turnover; difficult to work with organizations when there are new people all the time and they don’t return phone calls
- Seniors are utilizing home care services more than ever and they are waiting much later to move into senior residences
- The Jewish community appears to be disjointed in its service delivery (poor coordination; organizations operate in silos; not maximizing possibilities)
- Bureau of Jewish Education classes are not “up to par”
- The town of Maricopa has Jewish seniors and this population will likely grow
- Creating a Jewish CCRC (continuing care retirement community) is not a priority
- North Scottsdale is lacking in transportation, adult day centers, and senior centers
- Senior centers are too slow to adapt to the changing needs of today’s seniors
- Geography and demographics of Greater Phoenix have resulted in senior services not being available in certain areas
- Scottsdale’s population is aging steadily
- There is a shortage of skilled workers in the arena of senior services
- We need a better understanding of the needs and trends of local senior populations
- The issue of providing kosher food/meals needs to be addressed in the community
  - Kosher meals are very (too?) expensive to provide

**v. LOCAL EXPERTS IN THE FIELD OF AGING SERVICES**

Individuals with vast experience (tenure or diversity) or particular expertise in aging services were also interviewed. In total, ten “experts” were interviewed and their backgrounds generally fell into one or more of the following categories:

- Leader of aging services trade organization
- Leader or participant in high level aging advisory council
- Physician specializing in geriatrics
- Director of state aging services programs
- Director of health care systems
- Director of senior residences
- Director or board member of foundations that fund older adult initiatives

Their comments can be summarized as follows:

*\*\*Comment was made by more than one person*

- **\*\* People do not know where to go to find what they need/unaware of services available**
  - The consumer needs to be better educated about available services
    - Better outreach and communication is needed
  - Adult children and Baby Boomers looking after parents need information
- **\*\* Need pro-active educational program to help seniors and their caregivers understand the resources available as well as to plan**
  - financial, insurance, legal, medical, emergency issues
  - different kinds of home care services, levels of senior residential facilities, hospice, etc.
  - the purpose and benefits of case management
- **\*\* Very different populations among those over 65, with very different needs**
  - “young old” and the “old-old”
  - Baby Boomers versus seniors
  - affluent (e.g. those in Paradise Valley) versus subsistence level
  - those with family support and those without
- **\*\* Transportation is sorely lacking**
  - West Valley in particular
- **\*\*Traditional model of assisting seniors is outdated and does not reflect reality today**
  - A small percentage need assistance with activities of daily living (ADLs) such as personal care and meal preparation)
  - Congregate meals provide old-fashioned menus with no choices
  - Senior center programming is antiquated, including social and cognitive activities

- There is too little focus on the welfare of Jewish seniors in the central Phoenix area
- The Jewish community skews its emphasis towards youth/kids, to the peril of seniors
- Jewish community desperately needs a population study and needs assessment
- The model of the Chris Ridge Center for Senior Enrichment should be replicated in other locations around the Valley
- Are Jewish-sponsored older adult services a priority?
  - priority should be on providing *high quality* services, regardless of Jewish-sponsorship
  - “bricks and mortar” for new Jewish buildings and programs can strangle the Jewish community financially
- Not enough focus on preventative care and early intervention; we are caught in a reactive triage mode
- Residents moving into long-term care facilities are often “left at the door”; facility staff aggressively recruit residents and then don’t do much follow up after they settle in
- Government and foundation resources/funding for senior programs have been increasingly scarce in the past ten years
- Senior centers are deteriorating, with few capital improvements
- Health care systems are very complicated and difficult for older adults to navigate
- The distribution/accessibility of senior services throughout the Valley is not good
  - Services and programs need to be mobile
- More opportunities are needed for online senior networking
- Safety net programs will always be necessary and should never be “thrown under the bus”
- We need to be honest about what is actually needed by older adults versus projecting our own desires of what we would like to provide and what we hope older adults want
- Adult children who are caregivers often fail to plan for themselves
- Older adults can be too trusting

- Older adults need an advocate
- More case management services are needed
- Sophisticated in-home monitoring technology can go a long way towards helping older adults age in place
- Transitioning from hospital to home is a critical juncture for seniors
  - Opportunity to provide support and monitoring and prevent re-hospitalizations
- Most seniors do not have dental insurance
  - Need to have clinics provide lower cost services and/or have insurance providers make coverage accessible
- Supportive services to age in place are critical
- Recent economic downturn disproportionately affected seniors in the Sun Cities area
- Older adults without computer access is a problem
- Chronic disease management is important to address
- Consider hosting a Jewish Senior Action Day, to learn about community resources
- Before funding organizations to provide services, make sure they have sufficient capacity, expertise, and interest alignment
- Baby Boomers want meaningful engagement opportunities
  - If this isn't provided by the Jewish community and its organizations, Jewish Boomers will go elsewhere
  - Create leadership training for people over 55
- This community does not need a Jewish CCRC
- The "if you build it, they will come" philosophy has backfired on the Jewish community in Phoenix
- Providing top-of-the-line luxury in senior residences should not be the focus
  - Most people choose a senior residence based on its proximity to family and friends

- There is some stigma associated with utilizing the services of JFCS
  - some Jewish older adults equate JFCS as an agency for the poor, and therefore believe it provides substandard services
- The JCA should consider creating its own Senior Services Information & Referral service
- Outreach to existing service providers to help them be more “Jewish client sensitive”
- Do we know if seniors are asking/looking for placement in Jewish senior residences?

## vi. SUMMARY

There are many common threads in the comments received from older adults, Baby Boomers, caregivers, rabbis, senior services practitioners, and experts in the field of aging services. Many of the same unmet needs, barriers to receiving services, and ideas for addressing seniors' needs were identified by people in all groups queried. Individual comments often differed in specific wording and details, but common overarching themes clearly emerged.

### Most Commonly Cited Unmet Needs

- Transportation
  - in north Scottsdale, Carefree, Cave Creek, Sun Lakes and the West Valley
  - user-friendly public paratransit service
  - to the Valley of the Sun JCC, synagogues, and to programs and events of interest to seniors
  - options at night
- Socialization programs to address isolation
- Advocacy and financial assistance for vulnerable or needy seniors (especially those without local family, who do not live in a senior community, or who are in a skilled nursing facility)
- Sufficient and easily accessible information on available resources and services
- Jewish senior housing – CCRC, assisted living group homes, skilled nursing facility (Note: Comments were also received specifically mentioning Jewish senior housing was not needed)
  - Affordable and subsidized, but not necessarily just for low-income
  - High-end
  - Kosher
  - High quality
  - Located in Scottsdale, Northeast Valley or East Valley
- Affordable home care services
- Case management services
- More adult day programs
  - Affordable
  - with good memory care programming (including early-stage dementia)
  - for people with physical (not cognitive) impairments
  - located in North Scottsdale, Carefree and Cave Creek (where currently there are no known programs)

- Services in specific areas of Greater Phoenix
  - Jewish seniors who do not live in Scottsdale, Phoenix or the Northeast Valley feel they are not being served (especially in the West and East Valleys)
- Opportunities for community engagement through meaningful and fulfilling volunteer work
  - Opportunities especially targeted to Baby Boomers
- Proactive outreach to Jewish seniors by synagogues and local Jewish organizations (younger people with children are often the big focus of outreach efforts)
- More varied, high caliber, intellectually stimulating adult education classes/programs
- More and higher quality older adult programming in senior centers and JCCs
- Kosher food services - congregate and home-delivered meals, in senior residences, at Jewish sponsored events (Note: Comments were also received stating that the need for kosher food was minimal and the cost could not be justified)

#### Commonly Cited Barriers to Providing/Receiving Services

- Dispersed nature of Jewish older adult population (services are delivered only in certain areas)
- Lack of transportation to access services or participate in programs and activities
- Night-time programs
- Older adults' lack of information and awareness of services and programs
- Requiring facility with technology (computers/internet/social media/cell phones/texting)
- High cost of services (senior residences, home care, adult day care, respite care, transportation, etc.)
- Not enough information on Jewish seniors (need population study and needs assessment data)

#### Commonly Suggested Ideas for Addressing Unmet Needs

- Mobile programming – move programs and services around the Valley to serve Jewish seniors closer to where they live
- Provide transportation to Jewish facilities and Jewish sponsored events
- Volunteer matching services (matching community needs with available helpers) and professional volunteer training and organizing
- Create senior advocate program to assist those without local family who are in vulnerable situations
- Seek out community partnerships to leverage resources
- Create one-stop, single source of information/clearinghouse for senior services (an information and referral center, directory, etc.)
- Look to churches to emulate the programs they have to help seniors
- Look to other communities for models of Jewish senior housing
- Create more intergenerational programming
- Create a Jewish senior center (more robust than the Chris Ridge Center for Senior Enrichment)
- Develop programming to educate seniors and Baby Boomers on community resources as well as how to plan for their or their loved ones' senior years

## **E. Innovative Programs and Services and Best Practices**

This section reviews notable, innovative or “best practice” senior services provided nationwide. Included are descriptions of creative and leading-edge programs and services. The first part of this section covers Jewish community organizations and the second part covers entities outside of the Jewish community, or organizations that are part of a larger “movement” to benefit older adults.

### **i. OTHER U.S. JEWISH COMMUNITIES**

How Jewish organizations meet the needs of Jewish seniors varies widely throughout the country. Major determining factors influencing the number and array of Jewish programs and services are the size of the overall Jewish community, the preponderance of Jewish seniors and, most notably, available financial resources.

Much can be learned from looking at other Jewish communities and how they approach providing services and programs for seniors. Some communities are well known for their comprehensive and/or aggressive approaches while others have experimented with just one or two modest but innovative programs.

#### Jewish Service Providers

The following are nonprofit Jewish community organizations that typically provide senior services:

- Jewish Federations
- Jewish Family Service (JFS) organizations
- Jewish Community Centers (JCCs)
- Jewish organizations devoted solely to providing an array of senior services
- Jewish senior residential facilities (HUD senior housing, CCRCs - continuing care retirement communities, independent living, assisted living, memory care, short- and long-term, rehabilitation, skilled nursing facilities)
- Jewish residential and vocational centers for developmentally disabled adults
- Jewish senior centers and adult day health centers
- Jewish home care and home health companies
- Jewish hospices
- Jewish health care systems

Jewish Federations generally serve as central fundraising, coordinating and planning bodies for Jewish communities. They help fund organizations that provide services. It is not unusual, however, to find some Jewish Federations involved in providing direct services, including senior services. Examples include:

- Information and Referral - one-stop information on community resources and services - provided via:
  - Telephone

- Internet directory
- Hard copy directory
- Sponsoring occasional educational or social programs (e.g. “lunch and learn” events with speakers)
- Facilitation of community-wide senior services advisory or coordinating councils/task forces
- Administration of NORC projects (see following section, “Other Innovative Services and Programs” )

JFS organizations are typically a Jewish community’s comprehensive provider of social and supportive services for children, families and older adults. Programs and services for seniors might include:

- Information and referral
- Case management
- “Caring at a distance” programs - service coordination for seniors conducted in conjunction with adult children living away from elderly parents
- Counseling and social work
- Transportation – provided by professional staff, volunteers, or both
  - For one or more purposes (medical appointments, shopping, errands, religious services, senior centers, adult day centers, JCC programs, social or cultural events, etc.)
  - Wheelchair accessible (e.g. in special vans) or not (in volunteers’ private vehicles)
- Holocaust survivor assistance (war reparations assistance, in-home supportive services, case management, etc.)
- Congregate (kosher) lunch programs (with educational or entertainment programs)
- Kosher home-delivered meals
- Chaplaincy and para-chaplaincy services
- Religious services via teleconferencing for the homebound
- Holiday meal and gift basket delivery
- Bikur cholim (friendly visiting to the ill and injured)
- Bikur chaverim (friendly visiting to the homebound) by volunteers
- Volunteer in-home supportive services (friendly calls and visitation, assistance in the home with shopping, transportation, limited home maintenance and repairs, paperwork, computer assistance, etc.)
- Home care and home health (personal care aides for housekeeping, personal care, errands, companionship, transportation, etc.; and visiting nurses and physical therapists)
- Housekeeping services (house cleaning)
- Vocational services
- Guardianship services
- Educational programs (on aging, planning for aging, accessing community resources)
- In-home emergency response systems (emergency alert systems)
- Implementation of NORC and Village projects (see following section, “Other Innovative Services and Programs” )

Most JCCs provide adult programming and many have programs specifically for seniors. Commonly provided services include:

- Health, exercise and wellness programs geared specifically to adults (or seniors)
- Adult education
- Social and recreational programs – outings, games, cards, dancing, entertainment, films, speakers
- Transportation to and from the JCC (provided directly by the JCC or arranged through another service provider)

Jewish organizations that exist solely to serve the needs of seniors can provide any or all of the services mentioned above and more. Some Jewish senior services organizations include community senior centers, adult day centers, senior residential facilities, hospices and health care systems.

### Notable Community Programs and Services Provided in Other Jewish Communities

What follows is a review of some unique, innovative and particularly effective/efficient programs and services provided in other US Jewish communities. Research included internet searches, as well as email and phone conversations with some service providers.

#### Transportation

Many Jewish communities have transportation programs to directly assist seniors and people with disabilities. Communities might use paid staff to drive cars, vans, mini-buses or buses, or volunteer drivers (who use personal cars), and some communities have both. Transportation can be door-to-door, “arm-through-arm,” with or without an escort, or door-to-facility/event. Most programs either charge fees or gratefully accept donations for volunteer services.

Transportation services provided by many Jewish communities are often limited/defined by one or more of the following:

- Purpose of the trip (medical appointments, shopping, senior centers, adult day centers, Jewish community events, synagogue services, etc.)
- Geographic range
- Hours of operation
- Reservation requirements
- Ride fees or suggested donations

Some examples of Jewish community transportation services include:

- **Minneapolis, Minnesota** - Jewish Family & Children’s Services of Minneapolis
  - Conducting Options Education and Mobility Counseling  
JFCS received a \$50,000 grant in 2008-2009 from the National Center on Senior Transportation (NCST) to inform older adults and caregivers about transportation options available. JFCS developed a refrigerator magnet (“Safe

Reliable Transportation for Seniors”) that listed contact information for area transportation providers which was widely disseminated. Additionally, senior transportation options were published in articles in senior newsletters.

- Developing an Accompanied Transportation Program

JFCS received a second \$50,000 grant in 2008-2009 from the NCST to create an accompanied transportation program for low-income seniors who do not qualify for county or other financial assistance programs. A volunteer driver helps riders to and from the door of the car, or a volunteer escort accompanies riders who require a higher level of assistance throughout their outings. Two paid full-time staff drivers were hired to supplement the volunteers.

Fees for accompanied rides are set on a sliding scale depending on income. Reservations are required five days in advance, and rides are provided for any trip purpose.

- Expanding and Improving a Volunteer Driver Program

JFCS received a third \$50,000 grant in 2008-2009 from the NCST to recruit and train volunteer drivers to serve:

- Russian speaking older adults (paired with Russian speaking volunteers)
- Older adult synagogue congregants  
Working with Congregational Nurses (see Congregational Nursing Programs in the next section, “Other Innovative Programs and Services”), 16 congregations of all faiths were provided with free training and assistance to create volunteer driver programs.
- Accompanied transportation (see program described above)

- **Birmingham, Alabama** – Collat Jewish Family Services

- “Buz-A-Bus” – 14-passenger van with a wheelchair lift; \$30 annual fee to participate, plus \$5 for each one-way ride; within five-mile radius of JFS office
- Escorted Transportation - in cars; accompanied by staff; \$18/hour

- **San Diego, California** – Jewish Family Services of San Diego

- “On the Go: Transportation Solutions for Older Adults”

This program was initiated by the Jewish Senior Services Council of San Diego County. There is a \$20/person enrollment fee to utilize any service (waived if rider is a member of a JFS center, participating synagogue, the JCC or participating senior residence, or a volunteer driver).

- Excursions – organized outings to local attractions and events (\$6+/ride)
- Shuttles – door-to-door group rides to JFS social and wellness centers, religious events, shopping, restaurants, cultural events (\$4 each way)
- Rides & Smiles – door-to-door rides provided by volunteers

- On the Go Silver – premium, personalized door-to-door service for individuals or large groups, by professional drivers-escorts (fees depend on distance, time and escort/wait time)
  - Taxi Scrip – assistance with taxi rides for those whose needs cannot be met with On the Go services
  - Car Donation Program – donated cars can be exchanged for credit for future On the Go rides
- **San Francisco, California** – Peninsula Jewish Community Center
  - “Get Up and Go” – low-cost door to door rides, three days/week, to programs at the JCC, shopping, medical appointments, etc.
    - Three buses available with professional drivers
    - Volunteers provide rides and escort services for those needing extra assistance
- **Washington, D.C.** – Jewish Council for the Aging
  - “Connect-A-Ride” Transportation – a free resource center to help seniors find transportation services
    - Ride Smart workshops to help people learn how to use public transportation
  - “Smooth Riding” – assistance with coordinating and confirming local transportation arrangements for older adults
  - Escorted Transportation – subsidized rides for low-income seniors; up to four trips/month; maximum of three hours round trip per ride
- **Indianapolis, Indiana** – Reuben Senior and Community Resource Center
  - “Wheels to Wellness” – passenger car (no wheelchair lift) for rides to medical appointments; suggested \$7 donation per ride
- **Greater MetroWest, New Jersey** – Metro Transport (Daughters of Israel & The Jewish Community Foundation of Greater MetroWest NJ)
  - Individual rides - low-cost (\$2.50/ride) door-to-door rides to medical appointments, JCCs, senior centers, nursing home and hospital visits
  - Group rides – trips from senior care facilities and residences, synagogues and organizations

#### Unique or Notable Senior Services Provided by Jewish Community Organizations

- **Birmingham, Alabama** – Collat Jewish Family Services
  - “TLC Day” – Teens Lend a Caring Hand

Once a year, the weekend that Daylight Savings Time ends, groups of teens volunteer to adjust clocks, change light bulbs, replace batteries in smoke detectors, rake leaves, flip mattresses, clean ceiling fans, and perform other small jobs in seniors' homes.

- **San Francisco, California** – Jewish Family and Children's Services
    - Seniors at Home
      - The Futures Program – for healthy seniors wishing to plan for their future, anticipating that their needs will change as they age:
        - Free initial in-home consultation with care manager
        - Free quarterly check-ins to see if changes in plans are needed
      - Healthcare Advocacy – a team of registered nurses, care managers and volunteer physicians collaborate with seniors to assist with:
        - Understanding medical information and treatment options
        - Preparation for (and accompanying to) medical appointments
        - Family discussions about healthcare
        - Providing emotional support
        - Linking to and coordinating with other community resources
        - Guiding the preparation of advance directives
  
  - **Colorado** – Jewish Family Service
    - Phillips Family Foundation Senior Solutions Center
      - AgeForward – Consulting services to assist seniors and their families with preparing for and facilitating life transitions such as:
        - Hospital-to-rehab-to-home
        - Residential relocations
        - Decline in cognitive abilities
        - End-of-life situations

For a fixed fee, geriatric care professionals perform an initial consultation and prepare a personalized written assessment and proposed plan of care.

    - Volunteer Para-Chaplains – specially trained volunteers visit seniors in nursing and assisted living homes, personal residences and hospitals. Para-chaplains perform religious services for Shabbat, High Holy Days, Hanukkah and Passover.
    - Sensitizing Long-Term Care Facility Staff – JFS staff inform and educate nursing home staff on the values, traditions and holidays of Jewish residents.
- 
- **Washington, D.C.** – Jewish Council for the Aging
  - Heyman Interages Center

More than 200 volunteers deliver programs that bring together older adults and children.

- Grandreaders – older adults read to second grade children in a literacy program
  - Intergenerational Bridge - mentoring program for students in ESOL (English for Speakers of Other Languages)
  - Project SHARE - links children of all ages to participants in adult day programs and residents of assisted living facilities
  - Senior Tech Computer Training - older adults learn computer basics, word processing, email, graphics design and more. Courses are taught by expert older volunteers.
- **Miami, Florida** – Jewish Community Services of South Florida
    - JCS Clean Sweep – professional housekeeping services (minor to major cleaning) by insured workers
  - **Miami, Florida** – Greater Miami Jewish Federation
    - The Golden Care Foundation

A supporting organization of the Greater Miami Jewish Federation, the Golden Care Foundation provides its members with advocacy, referral and support services to create added security and self-sufficiency as they age. Golden Care serves elderly individuals or couples who receive little or no social support from family and seek to live independently. Staff assesses members' needs and desires and connects them to, and arranges for, services. Members are also provided with opportunities for regular social interaction, and are invited to participate in Federation and Jewish community events, including celebrating Jewish holidays and personal milestones.

Golden Care membership is open to members of The Foundation's Heritage Society who have established, or committed to establish, a permanent endowment within the Foundation for \$100,000 or more.

- **Indianapolis, Indiana** – Jewish Federation of Indianapolis/Reuben Senior and Community Resource Center
  - ElderSource

ElderSource is a network of coordinated services for older adults in the greater Indianapolis area and provides a single entry point for older adults seeking resources and assistance. Partner agencies - separate nonprofit organizations that receive funding from the Greater Indianapolis Jewish Federation - provide services that form a continuum of care for aging adults in a variety of living environments.

A program of the Reuben Senior and Community Resource Center, ElderSource utilizes trained staff to evaluate a senior's situation, determine service and program eligibility and make referrals for appropriate services. Seniors then hear directly from service provider agencies. Among the range of services available are:

- Senior housing
- Home care
- Adult day services
- Skilled nursing facility with specialized dementia care
- Home-delivered meals
- Care management
- Transportation
- Counseling
- Information and referral

- **Maine** – Jewish Family Services of Maine

- Shabbat on Wheels

- Trained volunteers lead Friday afternoon, pre-Shabbat services at long-term care facilities. Volunteers recite blessings, lead songs and prayers, conduct readings, share challah, wine, etc.

- **Boston, Massachusetts** – Jewish Family & Children's Service

- Long-Term Care Ombudsman

- A free service provided to nursing home residents and their families involves a corps of trained volunteers and staff who visit residents in 30 nursing homes on a weekly basis. They listen to residents' concerns, advocate on their behalf, and work to resolve problems. The program also provides information to families and individuals about short- and long-term care facilities.

- **Ann Arbor, Michigan** – Jewish Family Services

- Partners in Care Concierge Program

- Trained volunteers accompany older adults to medical appointments and procedures. Volunteers facilitate communication between the client and health care provider and produce a written report for the patient (and caregiver). This program, pioneered in Ann Arbor, is a model for other senior service providers around the country.

- ElderLink Program (Cultural Competency Training)

- To meet the unique needs of Jewish residents, ElderLink staff provide personnel of independent, assisted living, and nursing homes with information and tools on Jewish religious and cultural training, education and programming.

- **Detroit, Michigan** – Jewish Senior Life (JSL) of Metropolitan Detroit  
JSL has served Jewish older adults in the Detroit area for almost 100 years, providing a comprehensive array of senior residences, programs and services. JSL serves as a single portal for older adults to find assistance.
  - Art of Jewish Caregiving  
JSL offers a one-day retreat for health care professionals and caregivers to be educated about the diversity of Jewish culture, customs, rituals and traditions.
  
- **Southern New Jersey** – Jewish Family Service of Southern New Jersey
  - Patient Partners Program  
Trained volunteers accompany seniors to medical appointments and record, relay, and share the information from the visits with the patient and patient's family. The advocate helps decipher medical jargon and supports the patient.
  
- **MetroWest, New Jersey** - Jewish Federation of Greater MetroWest, New Jersey
  - Eldercare & 60+  
MetroWest NJ has a Department of Eldercare Services devoted to helping older adults remain in the community (age in place) as safely and comfortably as possible. MetroWest provides a webpage with extensive information on community resources for older adults.
    - CARES Initiative – Committee Addressing Resources for Eldercare Services  
Overseen by MetroWest NJ, CARES' objective is to create a continuum of care for the elderly through a comprehensive network of services. CARES brings together agency professionals and community leaders to leverage resources and strengthen the community's capacity to deliver services to older adults to foster independence, facilitate community involvement, and ensure dignity. CARES also provides leadership on eldercare issues by identifying trends to meet the emerging needs of the Greater MetroWest community, promoting advocacy, facilitating aging in place, and encouraging support for family caregivers.

CARES involves the participation of the following agencies:

- Jewish Federation of Greater MetroWest
- Jewish Family Service of MetroWest
- Jewish Family Service of Central New Jersey
- Daughters of Israel (senior housing, skilled nursing, rehab and dementia facilities, hospice and palliative care, respite care and services, adult day centers, Metro Transport)
- Jewish Vocational Service of MetroWest

- Jewish Community Center of MetroWest
  - Jewish Community Center of Central New Jersey
  - Jewish Community Housing Corporation (independent and assisted living options, kosher congregate meal sites)
  - Joint Chaplaincy of MetroWest (pastoral/spiritual care and chaplaincy services to all Jewish Community Housing facilities, where they are desired: hospitals, rehab facilities, hospices, etc.)
  - JESPY House (day programs and services for adults with developmental disabilities)
  - Jewish Service for the Developmentally Disabled of MetroWest, Inc. (residential services, educational and recreational programs)
  - YM-YWHA of Union County
- **New York City, New York – DOROT**  
DOROT is a senior services organization providing a large array of programs to help older adults live with dignity, independence and improved health. Many basic services are provided, such as information and referral (via phone, online, and email), in-home services (meal delivery, friendly visiting, computer training, etc.), and health, wellness, arts and cultural programs. On-site programs (classes, meals, holiday celebrations, concerts, etc.) take place at DOROT's center on the Upper West Side of Manhattan.

DOROT provides some particularly creative programming to enrich the lives of older adults and the wider community:

- Reading Assistance for the Visually Impaired – volunteers visit weekly for one hour to read printed materials, assist with mail, or help with paperwork.
- College Visitors for Holocaust Survivors – college students are matched with survivors for friendship and mutual appreciation. Students visit weekly for six months to one year.
- Mobile Minstrels – Volunteers bring their instruments and singing voices to seniors' homes.
- Family Circle – visits by a family with children aged 4-12, on Sundays before holidays (such as Rosh Hashanah, Chanukah, Tu B'Shevat and Passover), bringing with them holiday treats and gifts.
- Telephone Conference Call Programs – brings programs into seniors' homes via the telephone
  - University Without Walls – classes and support groups led by professionals and volunteers. A course catalog is provided and topics include the arts, history, health, current events, etc. *Anyone across the country may participate.*

- To Your Health – Seniors, their companions and home care aides may participate in call programs to learn more about health issues from professionals in the health care field. Peers participating in the calls can offer support and share their experiences. Courses are offered in English and Spanish.
    - Caregiver’s Connections – support groups and workshops conducted over the telephone to eliminate the difficulty of travelling to a meeting site.
  - Shopping & Escorting
    - Escorts to Medical Appointments – escorted door-to-door transportation
    - Shopping Assistance – assistance, or volunteers can do the shopping for homebound seniors
    - Cemetery Visits – door-to-door transportation and volunteer escorts to cemeteries throughout the NY metropolitan area (in July only, before the High Holy Days)
    - Escorts to Cultural Events – volunteer transport and accompaniment
    - Escorts to Voting Polls – volunteers provide registration forms, absentee ballots, or escort seniors to the polls on Election Day
  - Spiritual Connections
    - Mezuzah Program – volunteers help replace an old mezuzah or affix a new one. DOROT supplies new mezuzot (with kosher parchments). Volunteers stay for a visit.
    - Pastoral Care – rabbinic intern visits seniors in their homes and offers spiritual support and counseling.
  - Intergenerational Programs
    - Intergenerational Book Club - seniors and school children read the same book and gather at a school or DOROT’s center to share a discussion.
    - Bubbe’s Bakery – seniors and families with children aged 5-10 bake traditional Jewish foods and eat them together at a tea party.
    - Computer Training – Teenage Computer Corps volunteers teach seniors computer skills at the Dorot center or in seniors’ homes.
    - E-mail Pals – teens are matched with seniors who are learning computer skills to engage in an email friendship.
    - Intergenerational Arts and Crafts – at DOROT’s center or at schools seniors and children participate in creative projects together (photography, knitting, musical theater, collage making, etc.)
    - Mentorships – seniors share their experiences and knowledge with students or younger adults who are interested in learning from a mature person. Activities can include conversation, teaching a language, musical instrument, playing chess, etc.

- Oral History Projects – students visit seniors to listen to and document their life histories.
  - Phone Pals – teens living locally or afar engage in phone conversations with seniors.
- **New York City, New York** – JASA (Jewish Association Serving the Aging)  
 JASA is one of New York’s largest nonprofit agencies serving older adults in the Bronx, Brooklyn, Queens, Manhattan, and Long Island. In addition to a full array of senior services, JASA also offers a model approach to service coordination.
  - One Stop at JASA – With a staff of 14 full-time and five part-time employees, including representatives of key government agencies, co-located employees from the Social Security Administration and the Human Resources Administration, and trained volunteers, seniors are provided with a single location to apply for all government benefits and entitlements and to be linked with local services.
- **New York City, New York** – UJA – Federation of New York
  - Partners in Caring (PIC)  
 This Federation initiative outsources social workers from the Jewish Board of Family & Children’s Services to serve in participating synagogues, JCC’s, schools, or other Jewish institutions. Social workers provide consultation, training and direct social work, as well as crisis intervention, time-limited counseling, case management, information and referral, support groups, and community education programs.
  - Weinberg Senior Aid  
 Weinberg Senior Aid assists low-income, Jewish older adults ages 60 and older through a collaboration of social workers, attorneys, and nurses from four UJA-Federation beneficiary agencies: JASA (see above), Metropolitan Council on Jewish Poverty, Self-help Community Services, and New York Legal Assistance Group. Services are provided clients’ homes as well as in community offices.
- **Riverdale, New York** – The Hebrew Home of Riverdale  
 The Hebrew Home at Riverdale provides residential healthcare, rehabilitation, palliative care and senior housing with medical, nursing and nutritional care.
  - Elder Serve at Night  
 Elder Serve at Night is a program for those living with dementia who require constant supervision during night time hours. The Hebrew Home provides dementia assistance (social and recreational activities, snacks and breakfast, personal care, showering, toileting, therapies, etc.) in a supportive environment from 7 PM – 7 AM, or from dusk to dawn. Family caregivers benefit from being

provided with a full night's rest and in some cases this program can provide an essential alternative to full time placement in a nursing home.

- **Durham-Chapel Hill, North Carolina** – Jewish Family Service of Durham-Chapel Hill  
Memory Café  
For one two-hour session a month, the Jewish Community Center in Durham holds a drop-in Memory Café for people with memory loss to gather and connect. Conversation and activities are provided, as well as snacks and beverages. There is no charge to participate but donations are welcome.
  - “Chaverim on the Road” - JFS social worker visits senior residences once each month
  
- **Wyncote, Pennsylvania** – The Center for Aging and Judaism, Reconstructionist Rabbinical College
  - Sacred Seasons Celebration Kit  
Jewish faith kits for nursing homes, assisted living facilities and CCRCs to facilitate the celebration of Jewish holidays for the elderly. The “how-to” kits provide step-by-step instructions, a resource guide to books, music and ritual objects.
  
- **Scranton, Pennsylvania** – Jewish Family Service of Lackawanna County
  - DentalCare Center  
Only one of two such clinics affiliated with a JFS organization in the US, the DentalCare Center has been operating since 1920. In partnership with volunteer dentists from the Scranton District Dental Society and Fortis Institute, the DentalCare Center provides professional dental services in private dental offices to residents of Lackawanna County who are unable to afford dental care. Services include an initial examination, diagnosis, x-rays, prophylaxis, restoration and extractions, endodontic, periodontal and oral surgery.
  
- **Portland, Oregon** – Cedar Sinai Park  
Cedar Sinai Park provides residential and community-based care to the elderly and adults with special needs in an environment based on Jewish values.
  - Elder’s Family Learning Initiative  
Training classes and other resources to help caregivers and families understand and make decisions about the long-term care system, insurance (including Medicare and Medicaid), family conflict and family dynamics, elder legal issues, and good communication with staff in long-term care facilities.
  
- **Nashville, Tennessee** – Jewish Family Service of Nashville
  - Musical Helping Hands

A new program that matches Jewish musicians with Jewish seniors who have Alzheimer's disease or other forms of dementia. Musicians make personal visits and customize the music they play to suit the seniors and their families.

- **Toronto, Canada** - Association of Jewish Seniors (AJS)  
An umbrella organization for 28 Jewish seniors groups, AJS coordinates social and political action activities of importance to senior citizens 65 years and older, including forums, seminars, monthly general meetings, and cultural programs.
  
- **Vancouver, British Columbia (Canada)** - Jewish Seniors Alliance (JSA)  
JSA is a grassroots organization that provides information, education, advocacy and referrals for seniors *by seniors*. A large volunteer corps of seniors accomplishes the following:
  - Publication of the Senior Line magazine
  - Editing the annual Vancouver Jewish Seniors Directory (reaches over 5,000 Jewish seniors by direct mail, public libraries and businesses)
  - Hosting lectures, forums, workshops and symposia
  - Advocating and lobbying for seniors' needs
  - Peer counseling
  - Planning for a future wellness clinic and drop-in center

ii. **ADDITIONAL INNOVATIVE PROGRAMS AND SERVICES**

ProgramsforElderly.com  
Time Banking  
Naturally Occurring Retirement Communities (NORCs)  
Villages  
Community and Congregational Nurses and Social Workers  
Transportation  
Transition Programs (from hospital to home)  
Caregiver and Respite Programs  
Shared Housing and Senior Cohousing  
Concierge Supportive Services  
Needs Assessment Tools for Seniors  
Senior Center Improvement Training  
Discounts for Seniors  
Mobile Services

**ProgramsforElderly.com**

The most comprehensive resource for innovative programs and services discovered during the course of this Study was ProgramsforElderly.com. This online site researches and lists worldwide programs that provide “a better way to deal with aging.” Programs selected for inclusion in their more than 1,000 listings are those that directly impact seniors as well as those that help support seniors by increasing awareness, providing advocacy, and training professionals who interact with older adults.

ProgramsforElderly.com lists programs under the following categories:

- Elder Abuse and Prevention
- Aging Awareness and Sensitivity
- Caregiver and Eldercare
- Senior Contributions
- Dementia and Memory Care
- Senior Healthcare
- End of Life
- In-Home Care
- Senior Housing
- Elderly Nursing
- Senior Safety
- Senior Activities
- Senior Discounts, Coupons, Deals, Rewards
- Cool Aging Programs

The last category of services, Cool Aging Programs, focuses on outstanding and innovative programs. Many of the programs and services described in this section of the Study are listed under this category on the ProgramsforElderly.com website.

### **Time Banking**

Time banking is a worldwide movement also known by other terms such as Service Credits, Time Share, Time Dollars, Time Trade, or Time Exchange. Utilizing the concept of “paying it forward,” time banking is based on reciprocity rather than charity; by giving one’s time it will be returned. Participants or members in a time bank program give of their time, by providing services, and are therefore entitled to receive services from other time bank participants.

The first time bank program was started by a woman in Osaka, Japan in 1973 who believed people and reciprocity were more trustworthy than cash. Grace Hill Settlement House in St. Louis, MO began the first “service exchange” in the US in 1981. There are now tens of thousands of time bank programs across the world.

Time banks are established with various objectives, including helping frail elderly people remain in their homes, overcoming racial divides, reducing social isolation, assisting low-income families, or building a sense of community in a geographic area. The currency of time banks is time, not cash. It is not a barter system where the monetary value of a service is traded for the same monetary value of another service. Time banking is based on exchanging services for the same amount of *time* each requires.

Time bank participants can be individuals, groups, organizations, or businesses. While the time bank concept is built on the value of reciprocity, the exchange of time does not need to be between the same two entities. For example, Person A can provide services to Person B. Person A can receive services from Group C. Person B can provide services to Organization D, and so on.

Participants must be willing to provide services that require their time. Services can include anything and everything from pet care, babysitting, housekeeping, gardening work, house painting, respite care, cooking and baking, transportation, home repair and remodeling work, computer assistance, entertainment, art, crafts, music or language lessons, legal assistance, tax and accounting work, bookkeeping and paperwork assistance. There is no limit to the services possible in a time bank program.

Participants must also be willing to receive services or, if they don’t need or desire any services, be willing to donate them to someone else. As participants provide services they accrue or “bank” hours. As participants receive services, they are “debited” hours. At any given time a participant may have more hours banked than used, or more hours used than banked (in “debt”). Typically time bank programs will set a limit on the number of hours allowed for accrual (above a certain limit the participant will be asked to use or donate their credits) as well hours in debt.

Time banks in the US range from 15-20 members to those with more than 2,000 participants. While no cash is exchanged for services, members are usually asked to donate a small amount of money each year to help with operational costs. Members are also asked to participate, if possible, in organizing fundraising events for the program (for which they can earn hour credits).

Time bank programs can be run entirely by volunteers but most function with a paid coordinator who leads day-to-day operations. Typically there is also a leadership team or advisory board to make decisions. Policies and procedures are established to set membership requirements, leadership structure, cover liability issues, etc. Sophisticated software programs are often utilized to track services and hours offered, performed and utilized.

There are nonprofit organizations to assist communities with establishing and running time bank programs, as well as creating a network of local programs that can share information and possibly exchange services across the country. Examples include:

- **TimeBank USA**  
Headquartered in Washington, D.C., TimeBank USA was formed in 1995 to support and advance timebanking by offering onsite training and mentoring opportunities in locations across the country, consultation, webinars and teleconferencing, workshops, an annual conference, and access to numerous resources (including manuals, guide books and software) and research in the field of timebanking. Community Weaver is software developed by TimeBanking USA for tracking services offered, given, and received.
- **hOurworld.org**  
Headquartered in Portland, Maine, hOurworld.org supports a network of time banks across the country as well as overseas. They partner with various entities to conduct research on time bank programs, and provide onsite training and resource materials to help local programs become established and succeed. hOurworld.org developed the widely used Time and Talents software for tracking services offered, given, and received.

Examples of specific local time bank programs include:

- **Hour Exchange – Portland, Maine**  
Hour Exchange presently has over 1,000 members and offers more than 2,000 different services. The top services requested by members are, in order of demand:
  - Health care
  - Small business development
  - Arts and entertainment
  - Equipment rentals
  - Food
  - Home and other repairs
  - Gardening

- Transportation
- **Partners in Care (PIC) – Saverna, Maryland**  
 PIC is dedicated helping older adults in Maryland live independently and remain actively engaged in their communities. Time exchange is at the foundation of PIC along with supplemental services and assistance. PIC has 2,400 members in four geographic areas in Maryland: Anne Arundel, Frederick, Calvert, and Talbot Counties.

Some of the time exchange services offered include:

- Transportation
- Respite care
- Paperwork assistance
- Yard work
- Home repairs

PIC’s Member Care program offers additional support and advocacy for its older adult members through providing:

- “Warm Houses” - places where people in neighborhoods can gather for conversation and creative projects
- *Lifeline* emergency response systems
- Emergency Kits for Seniors, essential supplies for sheltering-in-place, during a power outage or other emergency

At its headquarters in Saverna, PIC opened an upscale thrift store “The Boutique.” The store provides one-third of the revenue for PIC’s programs and enables people to make donations and give back to the community with more than 100 volunteers contributing their time and talents.

- **Community Connections TimeBank of the Visiting Nurse Service of New York (VNSNY) – New York, NY**  
 The VNSNY is the largest nonprofit home health care agency in the US, offering a comprehensive array of home- and community-based services, programs and health plans for residents of New York City, and Nassau, Suffolk and Westchester Counties. In addition to providing skilled nursing care, rehabilitation and behavioral health therapies, VNSNY also provides free support and education to seniors and caregivers through public health screenings and seminars.

VNSNY operates TimeBanks in two neighborhoods in Brooklyn and five neighborhoods in Manhattan. High school students can earn student community service credits for participating in VNSNY’s TimeBanks.

- **Caregivers Rewards Program – Georgetown, Kentucky**

This is a proposed program; it is not yet operational. Volunteer caregivers in the community will perform caregiving duties and receive hours or credits for themselves to be used at a later time when they need their own caregiving. Examples of caregiver services include transportation, errands, housekeeping, respite care, pet care, yard work, minor home repairs, friendly visiting, and assistance with using computers. Caregiver “rewards” can be used in the following ways:

- As earned caregiver hours for themselves if they need them in the future
- As earned caregiver hours to donate to a disabled relative or friend
- As earned caregiver hours to include in a Last Will and Testament for children or others

When this program becomes state-wide or nation-wide, earned caregiver hours in one location could be used/redeemed in other locations.

### **Naturally Occurring Retirement Communities (NORCs)**

A NORC is a demographic that describes a community or area with a significant proportion of older adults. Factors creating a preponderance of seniors aging in place in one geographic area are:

- long-term residents remaining in place;
- in-migrations to attractive retirement areas; or
- the inability to leave areas that also have decreasing young populations.

NORCs can also be housing based:

- located in an apartment building, a housing complex with multiple buildings under common management, or in an area where many apartment buildings are clustered together, or
- in a neighborhood with one- and two-family homes.

NORCs can be found in urban, suburban and even some rural areas. With a relatively dense population of older adults living in close proximity, often connected by a common building, housing management, or neighborhood association, NORCs allow for efficient economies of scale and make it possible to organize and deliver services in new ways. Consequently, a new paradigm of community-based social services emerged in NORCs: the NORC Supportive Services Program (NORC-SSP).

### **NORC-SSP**

The NORC-SSP model is designed to help seniors age in place with greater comfort, health, safety and community engagement. Through a partnership building process, seniors, building owners and managers, local service providers, philanthropies, other community institutions and organizers come together to create coordinated services and programs that meet the needs and desires of seniors residing in the NORC.

Social workers, nurses and residents work together to make the following key or core program elements possible:

- case management and social work services;
- health care management and assistance, including disease prevention and health promotion;
- education, socialization and recreational activities; and
- volunteer opportunities.

Additional ancillary services can include, but are not limited to:

- transportation
- adult day care
- home and personal care services
- congregate meals and meal delivery
- fitness programs
- information and referral
- intergenerational programming
- mental health counseling
- legal advice and financial planning
- security and safety improvements in the home

The first NORC-SSP was established in New York City in 1986, with private philanthropic support. Its success led to city and state public policies and legislation to provide ongoing funding for NORCs. Today New York State has 54 NORC-SSPs that serve more than 50,000 seniors.

Recognizing the potential for broader applicability of the NORC-SSP model, the Jewish Federations of North America (JFNA) embarked on the NORC Aging in Place Initiative in 2001 to lobby for federal funding to develop and test the NORC-SSP model nationally. Between 2001 and 2006, Congress awarded 43 earmarks, administered by the Administration on Aging, to support the development of NORCs throughout the country. JFNA successfully advocated for the federal earmarks and annual allocations for NORC projects, many of which were administered by Jewish federations or other Jewish communal organizations. By 2008, Jewish Federations and their beneficiary agencies in 45 communities in 26 states were able to secure federal demonstration grants.

NORC-SSPs are typically public-private partnerships, with funding provided by government agencies, housing partners, philanthropies, corporations, and residents. Effective programs also attract in-kind support and services from partner organizations, other local organizations, and businesses.

As a result of JFNA's Aging in Place Initiative, there are currently more than 40 Jewish community-sponsored NORC-SSP demonstration projects located in 25 states.

## **Villages**

The Village model is similar to NORCs; within a discrete location or geographical area its goal is to help older adults safely age in place with the services, activities and community engagement opportunities for quality of life. Villages and NORCs use similar strategies. There are notable differences, however, between the two models:

<b>Villages</b>	<b>NORCs</b>
Typically originate as a grassroots movement of many entities	Typically originate as an initiative of a social service agency
Largely operated and governed by its members (older adult residents) who form a nonprofit organization	Largely operated and governed by the parent/sponsoring organization
Typically serve lower- to middle-income seniors	Typically serve a lower-income/more vulnerable population
Funding is from member fees, grants, in-kind donations, individual donations and sponsorships	Funding originates from federal Administration on Aging grant and supplemented by other government agencies, housing partners, philanthropies, corporations, residents, and in-kind support and services
Services are typically “concierge,” matching services to residents needs	Services are provided directly by the governing organization and/or its partner organizations

The Village model is a grassroots, community-based membership organization, designed, built and governed by the Village members. Villages offer members a network of resources, services, programs and activities such as transportation, computer assistance, grocery shopping, minor home maintenance and repairs, social, cultural and educational programs, health and wellness activities, and volunteer opportunities. Villages facilitate social connections and access to supportive services.

Almost all Villages start as an all-volunteer effort, but most raise money over time and hire an Executive Director (who is sometimes a social worker), Volunteer and Member Services Manager, and office support. Services are provided by volunteers from inside and outside the Village as well as contracted service providers (who are vetted and offer discounted services).

Average Village membership is 200 participants, with an average annual membership fee of \$430/individual and \$1,000/household. Many Villages have reduced fee memberships for those with financial constraints. Membership fees often include basic transportation for shopping, excursions, and regular social events. Other types of trips are usually offered on a fee-for-service basis, with member discounts.

The Village “movement” was launched in 2002 with the creation of Beacon Hill Village in Boston, MA. Currently there are more than 120 Villages operating in 39 states, with more than 25,000 members. There are well over 100 additional Villages in the development stages.

#### Village to Village Network (VtV)

The VtV was created in 2010, by and for Villages, as a peer-based network to help communities establish, manage and improve their own Villages. VtV offers a suite of tools and resources to support the creation of Villages, including consultation, peer mentoring, discussion forums, a document library, webinars, web site and annual conference. VtV also offers a directory of Villages across the US. There are currently 175 members of the VtV Network.

VtV is launching the National Village Exchange (NVE) program, which is currently in the pilot stage. Nine Villages across the country are participating as “hosts” to exchange member benefits. For example, an Ashby Village member in Berkeley, CA can travel to the Columbine Community Village in Littleton, CO and participate in Village programs, trips and seminars at member prices, receive information on restaurants, hotels and related requests. Member benefits of the NVE program are only for short-term visits (less than two weeks per year).

#### Don'tMoveAway, Inc. (DMA) – Roslyn Heights, New York

Modeled after Beacon Hill Village, DMA was launched by two Roslyn Heights residents in 2008. It is a nonprofit organization in an affluent community on Long Island. DMA provides assistance, support, programs and opportunities for socialization for seniors 50 and older who want to remain in their own homes.

Annual membership dues are minimal - \$35/single and \$50/couple – because DMA focuses on cultural activities and socialization rather than on social and health services. Members have access to a contractor/vendor listing, which includes information for repair shops, assistive devices, and other service providers recommended by DMA members. Some contractors/vendors offer discounts. Members also receive newsletters, community resource information and links (via the website), and invitations to all social and recreational DMA events. Examples of DMA events include speakers on elder law, computer classes, and book discussions.

#### Villages in Greater Phoenix

Three Villages are currently being developed as pilot projects in the Greater Phoenix area. Each pilot involves a partnership of organizations as well as a needs analysis that includes community surveys, meetings with community leaders, and focus group meetings with seniors.

- **The Central Village – Phoenix**

The Central Village was launched in October 2013, the first Village in Greater Phoenix, in a service area within a three-mile radius of Central and Maryland Avenues. Central Village incorporates both the Village and time banking models. It

is membership-based, and provides services so that people can age in place. Central Village has been incorporated as a nonprofit organization.

Adults over the age of 18 living or working within the Central Village area are invited to join as members. Annual membership is \$60/individual and \$90/two-member household. Members enjoy and support each other through volunteer exchanges and by participating in cultural, social and educational activities. Information and referral services are available for those 55 and older. New members must pass a background check and attend a Village orientation.

Partners organizations involved in Central Village include the City of Phoenix, Area Agency on Aging, Duet, the Greater Phoenix Age-Friendly Network (a multidisciplinary team of governmental and nonprofit organizations hosted by Maricopa Associated Governments) and All Saints Episcopal Church and Day School. Central Village recently hired its first part-time Office Coordinator who works out of the All Saints Church and Day School. People are being recruited as volunteers, for membership, and to help plan the Village. To date the following has been accomplished:

- Village-hosted educational programs and trips/outings;
  - members have been referred to organizations such as Jewish Family & Children’s Service, Area Agency on Aging, and Duet;
  - 56 different services have been offered through time banking; and
  - More than 800 hours of service have been exchanged so far.
- 
- **Northwest Valley Village**  
Benevilla, Sun Health and Northwest Valley residents are in the process of forming a nonprofit organization to create a Village program to help older adults age in place in the Sun Cities, Surprise, Peoria, El Mirage, and Youngtown. They are currently exploring the possibility of launching an Independent Transportation Network (ITN) affiliate in conjunction with the Northwest Valley Village (see ITN below, under Transportation).
  - **Tempe Village**  
Tempe Community Council (TCC) is partnering with Tempe Neighbors Helping Neighbors (TNHN) and residents to develop a Village program in Tempe. TNHN will be expanding its volunteer-based services into a full scale Village program.

## **Community and Congregational Nurses and Social Workers**

Many programs around the country provide nursing and social worker services through community organizations, centers, and programs as well as religious congregations. These services provide in-home social support and health care and, in some cases, spiritual sustenance to older adults.

### Living at Home/Block Nurse Program (LAH/BNP) - Minnesota

LAH/BNP is a community program that utilizes professional and volunteer services to provide information, social and support services, nursing and other professional services to older adults who might otherwise need to reside in skilled nursing facilities. LAH/BNP was created in 1990 when two successful Minnesota-based programs merged: the Living at Home Program (LAH) and the Block Nurse (BNP) Program.

The state of Minnesota has been funding LAH/BNP programs since 1991. The LAH/BNP approach, compared with the cost of a skilled nursing facility, is a major rationale and impetus for governmental and community support.

LAH/BNP programs provide two categories of services: free, informal volunteer delivered services and fee-based professional services. Fee-based services may be eligible for reimbursement through Medicare, Medicaid, HMO's, the VA, long-term care insurance or private health insurance. Services without reimbursement are billed on a sliding scale fee, based on ability to pay, with grants from foundations and state and federal government funding the gap in reimbursement. Locally raised funds can assist with nursing services reimbursement and some LAH/BNP's generate enough revenue to pay for non-reimbursed care.

A program director or service coordinator conducts an initial assessment for new participants. If nursing services are required, the home health agency's Primary Block Nurse (a community based, certified public health nurse with geriatric training) conducts an additional assessment. This gatekeeping function assures that only the needed services and quality care are provided.

Block Companions (home health aides/homemakers) and Block Volunteers all communicate with one another and with the program director or service coordinator for the benefit of the older adult participant.

Communication between Block Companions (home health aides/homemakers), Block Volunteers, and the program director or service coordinator is critical to an effective LAH/BNP program.

### Volunteer Services

- Friendly visiting
- Telephone reassurance
- Lawn/garden services

- Transportation
- Assisting with paperwork
- Socialization (escorting to activities)
- Facilitating intergenerational activities

#### Professional Services

- Health history assessment
- Skilled nursing
- Home health aide support
- Durable medical equipment
- Physical/occupational/speech therapies
- Palliative and hospice care
- Vision, hearing and depression screenings
- Blood pressure and blood glucose monitoring
- Medication management
- Referrals/reminders for health maintenance
- Coordination of needed health services and consultations with health care providers

LAH/BNPs also connect participants to other needed services, such as congregate or home-delivered meals, adult day programs, respite care and caregiver services, legal and financial assistance, etc.

#### Congregational Nurse Programs

Congregational nursing, also known as faith community nursing or parish nursing, is a long-standing tradition in the Christian world. Congregational nurses provide spiritual sustenance and physical care for those who temporarily or permanently are unable to participate in organized religious life.

In the US, parish nursing began in the mid-1980's in Chicago. Today there are over 15,000 registered nurses, primarily in the US, who serve as congregational nurses in Christian, Jewish, Muslim and other faith communities.

Faith community nurses can serve many functions:

- Health advisor and educator
- Visitor to congregants' homes or in the hospital
- Provider of referrals to community resources
- Provider of assistance in obtaining needed health care
- Developer of support groups within the congregation
- Trainer and coordinator of volunteers
- Provider of health screenings (e.g. blood pressure, blood sugar levels, etc.)

Many models of faith community nurse programs exist:

- A congregation supporting its own full- or part-time nurse;
- Several congregations pooling their resources to support one nurse;
- A group of volunteer nurses supporting one or more congregations; or
- A nurse affiliated with a hospital or clinic who provides support to a congregation.

In the US, about one-third of congregational nurses are compensated financially for their work. Typically faith community nurses belong to the Health Ministries Association, the national professional membership organization for faith community nurses.

Obstacles to congregations developing faith community nursing programs include lack of interest and financial constraints, not a high priority or too expensive. Nonetheless, congregations who move forward and develop programs generally secure funding from foundations, community organizations, and within the congregation.

- **Congregational Nurse Program (CNP) of Greensboro, North Carolina**  
Established in 1998 with a grant from the Cone Health Foundation, the CNP of Greensboro provides for a congregational coordinator based at Cone Health who assists community congregations with developing and implementing a Health Ministry Program. Each program is tailored to meet the needs and capabilities of individual congregations. Currently there are 48 faith communities participating in the Greensboro CNP with either a paid or volunteer congregational nurse.
- **Jewish Congregational Nurse Programs**  
Slower to catch on, there are now many Jewish congregational nurse programs in synagogues throughout the country. The Union for Reform Judaism (URJ) describes the aim of Jewish congregational nurse programs as promoting the relationship between faith and health, and creating a link between the healthcare system and the congregation.

The URJ also describes the duties of a congregational nurse:

- Teaching health and wellness programs and facilitating support groups
- Counseling on health issues and making community referrals
- Serving as a resource to coordinate services, collaborate with physicians and other health care professionals
- Promoting health through blood pressure screenings, flu shots, health fairs, etc.
- Advocating for congregants with medical personnel and staff in hospitals and nursing homes
- Providing spiritual comfort in consultation with the rabbi

A few current Jewish congregational nurse programs are described below.

Project SHIN (Spiritual Healing Integrating Nursing) – JCC MetroWest, New Jersey

Launched in 1999, with funding from the Healthcare Foundation of NJ, Project SHIN provides nurse services to older adults who participate in the JCC's senior educational, recreational and cultural programs held at synagogue satellite centers, as well as participating synagogues' congregants.

After the first years of Project SHIN, the Healthcare Foundation asked for more "buy-in" on the part of synagogues. Two synagogues receiving services made financial contributions. Additional funding came from the local Jewish Federation and the Grotta Foundation to hire a part-time nurse to cover three new synagogues. Today Project SHIN serves ten congregations in addition to the JCC senior group.

There are five distinct components to Project SHIN's nurse services:

- Office visits at synagogues  
Nurses see people individually to answer questions, provide advice, monitor blood pressure, and possibly schedule longer visits in the congregant's home.
- Home visits  
Nurses provide office visit procedures as well as check that medication is being correctly taken and that food/nutrition and other housekeeping and maintenance needs are met.
- Educational programming  
Nurses write articles in synagogue newsletters and give presentations to senior audiences.
- Hospital visits
- Spiritual counseling

Communication between the congregational nurse, the synagogue Caring Committee and the rabbi is crucial to the success of the program. The nurse serves as the professional eye and the Caring Committee, in turn, does much of the follow-up (e.g. assisting with a congregant's needs for meals, housekeeping, transportation, friendly visiting, etc.).

- **Community Nursing/Advocacy Programs**

Variations on the congregational nurse model are continually emerging. Rather than just serving the needs of older adults who are members of congregations, community nurse programs also tend to the needs of older adults regardless of any congregational affiliations.

Community nurses can serve as advocates, helping to improve conditions for older adults in nursing homes or hospitals.

#### Greensboro, North Carolina

Jewish Family Services employs a part-time nurse (15 hours/week) to serve older adults in the community at large as well as at two synagogues. The nurse provides health information and workshops on special topics, such as Medicare Part D, and sees individuals and their families in their homes, at Jewish Family Services' office, or in other community settings.

Duties of the Greensboro congregational/community nurse include:

- Reviewing medications and side effects
- Advocating for an individual with other health care professionals
- Accompanying individuals to doctor appointments
- Home visits after a hospital discharge
- Visiting a nursing home to offer comfort and support
- Assisting with accessing resources
- Providing health screenings
- Answering questions

- **Congregational Social Worker Programs**

Responding to the reality that many older adults are reluctant to use public agencies for their social service and mental health needs, faith communities try to provide this kind of support to their congregants. However, most clergy and congregations lack the expertise to provide therapeutic interventions or to navigate the complex web of community social services. Congregations, therefore, have engaged volunteer or paid social workers to perform this service.

#### The Congregational Social Work Education Initiative (CSWEI) Internship Program – North Carolina Agricultural and Technical State University and University of North Carolina at Greensboro

North Carolina A&T State University developed the CSWEI to give undergraduate and graduate students specific education and experience in the field of congregational social work.

After receiving pre-service training in gerontology, BSW and MSW students participate in non-traditional internship opportunities to provide community-based social work services to Greensboro area congregants and residents. Partnering with congregational nurses from Greensboro's Congregational Nurse Program, social work interns provide health and mental health services at one of 20 faith institutions, three nonprofit agencies, or three community centers. Social work interns perform assessments,

supportive counseling and therapy, linking and coordinating services (case management), educational services, and evaluations.

Kesher Program – Jewish Family Service of Rhode Island

Launched in 2007 with a grant from the Jewish Federation of Rhode Island, Kesher provides JFS social workers for immediate and long-term support for congregants of local synagogues. All services are free of charge.

Social workers spend time at each synagogue, offering case management, information and referrals, short-term counseling, support groups, and educational programs. Social workers also provide ongoing support for synagogue clergy and staff, *bikur cholim* and caring committees.

Transportation

Older adults who no longer drive, or cannot safely drive long distances or at night, are at risk of social isolation and withdrawal from recreational, educational and religious activities. Finding user-friendly transportation services for even the most basic and necessary purposes, such as medical appointments and grocery shopping, can often be a challenge. Transportation, therefore, is among the most pressing unmet needs for older adults.

In response, many communities, agencies and organizations have tried to address this need. With many challenges inherent in providing transportation services, such as cost, liability and geographical logistics, innovation has been exceedingly important. In addition to many small scale volunteer driver programs, taxi vouchers, and fleets of cars, vans and mini-buses (only possible with sufficient funding), the following programs are examples of particularly innovative approaches.

- The Beverly Foundation

The Beverly Foundation, located in Pasadena, CA, was originally established to assist long-term care providers with information and training, and technical assistance. Recognizing need, in 2000 the Foundation shifted its focus to senior transportation.

STAR (Senior Transportation Action Response) Research/STAR Awards Program

Since 2000, the STAR program has been the Beverly Foundation's primary research initiative. Each year organizations across the country are invited to submit their senior transportation programs as examples of innovative and effective approaches. STAR Award winners are judged according to criteria known as "The Five A's":

- Availability
- Acceptability
- Accessibility
- Adaptability
- Affordability

STAR Awards for Excellence and STAR Recognition Awards have ranged from \$500 to \$10,000.

As a result of the STAR program, the STAR Search database was developed, which includes information on STPs (Supplemental Transportation Programs for seniors), volunteer driver programs, and volunteer drivers. In its first ten years, the Beverly Foundation identified almost 1,000 STPs (at least one is located in every state), and has surveyed more than 700 volunteer driver programs. STPs provide assistance to seniors that public and paratransit services often cannot. For example, they provide door-to-door and door-through-door assistance, operate at variable times, cross jurisdictional boundaries, and allow passengers to make multiple stops.

A large number of STPs own their own vehicles. Many have utilized Section 5310 of the Federal Transit Funding Program that provides 80% grant assistance to nonprofit organizations for the purchase of vehicles to assist seniors and individuals with disabilities.

The Foundation publishes an annual STAR Search report along with many other technical assistance documents, including:

- TurnKey Kit for planning a volunteer driver program
- Series of ten fact sheets, produced in conjunction with the National Center on Senior Transportation (NCST)
- Materials on “dementia friendly” transportation options

In a profile of 47 STAR Award winning STPs, the top three transportation destinations seniors request are medical appointments, grocery shopping, and recreational activities.

#### The TRIP (Transportation Reimbursement and Information Program) Model

The original TRIP program was created in Riverside, CA through collaboration with the Independent Living Partnership, the Area Agency on Aging, and the County. The Beverly Foundation used the TRIP model as excellent example and developed informational materials for communities to launch TRIP or similar programs.

The TRIP model responds to the challenges of volunteer driver programs, including recruiting drivers, reluctance to receive charity from volunteers, and scheduling. TRIP is a low-cost, low maintenance, customer-driven approach that includes three main ingredients: a sponsor (organization), senior riders, and drivers. The program operates as follows:

- Sponsor provides materials about the program to the riders
- Riders recruit their own drivers (friends, neighbors, referrals, etc.)
- Riders share program materials with their drivers
- Drivers provide rides
- Riders and drivers submit documentation of the rides to the sponsor
- Reimbursement is sent to the riders who then give it to their drivers

TRIP programs allow for the possibility of rides 24/7 and to destinations mutually agreed upon by rider and driver. The sponsor is not involved in recruiting drivers, scheduling the rides, does not own vehicles, and does not incur liability because drivers are not recruited or managed by the sponsor.

Many variations of the TRIP model are possible and have been created in communities across the country. The program can be tailored to accommodate local circumstances and desires.

- **National Center on Senior Transportation**

Launched in 2006 with funding from the US Department of Transportation's Federal Transit Administration, NCST is administered by Easter Seals, Inc. in conjunction with the National Association of Area Agencies on Aging. The mission of NCST is to increase transportation options for older adults and enhance their ability to live independently within their communities.

Activities of the NCST include:

- Gathering and sharing information, including best practices;
- Providing technical assistance and training;
- Facilitating strategic partnerships and community engagement to help develop and coordinate senior transportation options; and
- Administering demonstration grants.

Since 2007, NCST has provided \$1.3 million in financial support, technical assistance and resources. Many innovative senior transportation programs are profiled on the NCST website.

- **ITNAmerica (Independent Transportation Network)**

ITN, launched in 1995 in Portland, Maine as a pilot project (*ITNPortland*), has expanded to become the only national nonprofit transportation system for older adults. There are currently 24 affiliates located across the country (including *ITNTucson*) and more are forming.

Like TRIP, the ITN model recognizes that existing transportation options for seniors are challenging or inconvenient due to cost, inflexible schedules, restricted routes, and limited pick-up and drop-off points.

Features of ITN's services include:

- Eligible riders are 60 or older or visually impaired
- A membership fee is required to receive services
- Rides are available 24/7 within the designated service area
- Rides may be booked without advanced notice
- There are no limitations on the ride purpose
- Rides are in private automobiles by trained drivers, either paid or volunteers
- Service is door-to-door, arm-through-arm, and help is provided with carrying packages and other items
- Fares include a base pick-up fee plus a per mile charge
- Discounts are provided for advanced reservations and shared rides

An average ITN affiliate has paid staff that includes an executive director, ride dispatcher, and part-time drivers. Interns (paid and unpaid) and volunteers (including drivers) make up the remainder of staff to operate an ITN. Ride dispatchers first try to utilize volunteer drivers. If none are available, paid drivers are used and compensated by the hour/mileage based on occupied rides (allowing for one-way trips).

Members (riders) create pre-paid Personal Transportation Accounts. Cash or credit is stored in a member account. Account credits are earned as a volunteer driver, trading a car, annual member birthday gifts, or referrals. Members receive monthly statements detailing their rides taken and account balances. ITN operates as a cashless system.

Benefits of ITN membership include a quarterly newsletter, an annual birthday credit of \$5.00, and the ability to use the services of any ITN affiliate across the country.

There are many facets of the ITN program that create efficiency, cost savings, and community building:

- Transportation Social Security  
ITN volunteers accrue transportation credits for their efforts. The credits may be used for their future transportation needs, to help pay for family members' rides, or be donated to low-income seniors through the Road Scholarship Program. Credits are honored at any ITN affiliate in the country.
- Road Scholarship Program  
Help for low-income seniors to pay for their rides.
- Ride and Shop

Merchants, such as supermarkets and shopping malls, contribute to bring customers to their stores. Billing is conducted directly with merchants and contributes to the cashless system for riders.

- **Healthy Miles**  
Health providers pay for rides to bring patients.
- **CarTrade**  
Seniors can trade or donate their cars for ITN rides. The value of the car is converted to credit and placed in an ITN member's account. (ITN will either keep or sell the car depending on its condition.)
- **Car Donation**  
Vehicles may be donated to ITN as a tax-deductible gift.
- **Ride Services**  
Community organizations (such as churches, long-term care facilities and health care providers) can contract with ITN to provide transportation for their members, residents or clients. Ride Services provides a way for community organizations to supplement the transportation services they already provide.
- **Walks for Rides**  
This annual walk-a-thon is a fundraising event for ITN affiliates across the country.
- **ITN Gift Certificates**  
Anyone may purchase a gift certificate for an ITN member.

ITNAmerica looks for new affiliate locations and provides start-up and operational support through technical assistance and specialized software. Start-up and sustaining funds must be procured by ITN affiliates, with no more than 50% of funding coming from public sources in the first eight years. ITN does not want to compete with public transportation programs for scarce tax payer dollars.

- **CarFit**

Created by the American Society on Aging in 2005, and developed in collaboration with the American Automobile Association (AAA), AARP and American Occupational Therapy Association, CarFit is a program to:

- help older drivers find out how well they fit in their personal vehicle;
- demonstrate actions they can take to improve their fit; and
- encourage conversations about driver safety and community mobility.

Examples of CarFit instructions include good foot positioning on the gas and brake pedals, proper adjustment of car mirrors, and safe seating distance from the steering wheel.

CarFit is based on volunteers committed to running the program in a specific area. Volunteer Event Coordinators attend two-day training sessions to learn how to host

CarFit events using proper programmatic procedures. Event Coordinators train CarFit technicians, secure dates and locations, participate in and monitor events, and communicate with the national organizations.

### **Transition Programs (from hospital to home)**

For many older adults, being discharged from a hospital and returning home or to a rehabilitation facility leaves them critically vulnerable. Patients often leave hospitals in a weakened state. Typically there are prescription medications to obtain, medical care instructions to follow, and follow-up doctor appointments. Living alone or with others who may be unable to help is especially challenging.

Service providers, and even government funders, are recognizing the steep costs involved with re-hospitalizations of the elderly. Not only is returning to the hospital mentally and physically taxing for the patient but it is very expensive for patient, private insurers, Medicare and Medicaid, and tax payers. New programs have emerged to ease the transition from hospital to home and to reduce the likelihood of re-hospitalization.

- **Central East Home at Last – Peterborough, Ontario**

Central East Home at Last is a free service to assist older adults with a smooth transition from hospital to home. Home at Last is funded by the Central East Local Health Integration Network and is a partnership between hospitals, other community support services providers, and the Central East Community Care Access Centre.

Home at Last services may include:

- Driving and/or accompanying a patient home
- Picking up medications and/or groceries
- Preparing a small meal
- Identifying potential safety issues in the home
- Providing personal care and/or homemaking services
- Following up with phone calls and/or visits to check on the patient's well being
- Making referrals to other community support services

- **Care Transitions Program – University of Colorado, Division of Health Care Policy and Research**

The Care Transitions Program aims to educate and empower patients and their families for a more successful return to their homes or skilled nursing facilities. "Care Transition Coaches" work with patients and their families in the hospital, before discharge. The Coaches provide information on medication self-management, necessary physician follow-ups, how to actively participate at a doctor appointment, and signals that a condition is worsening and how to respond. Coaches provide a hard copy "Discharge Preparation Checklist" to patients. Coaches also provide follow-up visits and phone calls once patients have returned home or to skilled nursing facilities.

## **Caregiver and Respite Programs**

- **Livable Communities Caregiver Coaching – Department of Senior Programs and Services, Westchester County, NY**

This Caregiver Coaching program is part of the larger Livable Communities initiative, identified by AARP as one of three model programs in the US. Professionals train volunteers to become caregiver coaches to provide one-on-one support to elderly family caregivers. Coaches do not perform caregiving duties or dispense medical or legal advice.

Using a curriculum developed by Fordham University's Ravazzin Center on Aging, volunteer coaches receive 12 hours of training. Nurses, social workers and geriatric care managers teach classes followed up by having volunteers attend monthly support groups to share their experiences.

- **Time Out Respite – Temple University, Philadelphia, PA**

Time Out Respite is an award-winning program that provides low-cost, in-home, intergenerational support services to family caregivers. Since 1986, Time Out Respite trains and supervises college students to provide respite care for elderly caregivers. The program is particularly useful to medical students and those studying geriatrics. Students assist with meal preparation, housework, light grocery shopping, assistance into the bathroom, and as escorts to medical appointments. They do not provide personal care, general transportation or administer medications or therapies.

A student is paired with a client for at least one semester, and eight hours per month. Cost for services is \$8/hour plus a \$25 annual registration fee. Student respite workers receive pre-service training and ongoing support related to aging and the needs of caregivers. Students are carefully screened and must pass a background check.

## **Shared Housing and Senior Cohousing**

While NORCs and Villages focus on creating a supportive community to help older adults age in place, shared housing and cohousing create a supportive immediate residential situation. Living under the same roof or in the same intimate cluster of homes with others who provide assistance enables seniors to age in place in safety, with ease, and cost savings.

### Shared Housing

The typical shared housing program involves two unrelated people sharing a home, each with his or her own bedroom space, for rent or a service exchange (e.g. performing household or personal tasks). A homeowner interested in sharing his or her house might be a senior, a person with disabilities, someone struggling with living expenses, a working professional or

someone simply desiring companionship and the experience of shared housing.

Shared housing has many benefits:

- Helps seniors age in place (independence results from interdependence)
- Addresses the issue of loneliness
- Provides affordable housing
- Promotes intergenerational relationships and opportunities
- Builds and stabilizes communities by utilizing existing housing stock and keeping people in their communities who might leave (due to needing more assistance or affordability)

Shared housing programs are typically run by nonprofit organizations with funding coming primarily from local government and foundations.

- **National Shared Housing Resource Center (NSHRC)**

Gray Panther activist Maggie Kuhn, established NSHRC in 1981. She saw the need for shared housing programs in the US. The NSHRC provides training and technical assistance through conferences and a network of representatives, serves as an information clearinghouse, provides referrals, and offers manuals, directories and newsletters on shared housing programs. More than 70 shared housing programs in the US are members of the NSHRC.

- **HomeShare – Elderhelp, San Diego, CA**

HomeShare is a program for residents of San Diego and Poway. Home providers are seniors and home seekers can be adults of any age.

ElderHelp’s trained housing social workers match home providers with home seekers, using a process that includes:

- In-home assessments
- Evaluation of references
- Screening, reference checks and criminal background checks
- Assistance with written housing agreements
- Support and mediation, as desired, after matches are made

Senior home providers have two options for an agreement with home seekers:

- Low-rent, for someone needing affordable housing; or
- Service exchange, for homeowners who need assistance around the house (housekeeping, yard work, cooking, transportation, etc.) in exchange for a room.

- **The Home Sharing Program – New York Foundation for Senior Citizens (NYFSC)**

Since 1981, the Home Sharing Program operates in New York City's five boroughs. One of the program's "matchmates" must be 60 or older. There are currently 200 homes involved in the program citywide and some matches (between host and guest) have been in place for over 20 years.

NYFSC utilizes its own "QUICK-MATCH" database to help pair hosts and guests. Potential "matchmates" become acquainted through "match meetings" scheduled and staffed by NYFSC social workers. If a match is desired, NYFSC facilitates a written agreement which is signed by all parties.

- **Goodyear Independent, Shared Housing for Seniors (GISHS) – Exito, Goodyear, AZ**

Exito is a nonprofit organization that serves the Hispanic community in Arizona by acquiring, owning, leasing and managing real estate and other investments in order to provide housing and community and economic development opportunities. In 2005, Exito created the Goodyear Independent, Shared Housing for Seniors program with funding from HUD, Maricopa County, community partner organizations, and program income.

GISHS is different from other shared housing programs because Exito, and not the residents, owns the homes. Exito purchased ten homes in a two-mile square area of Goodyear where most services are plentiful (except public transportation). Two of the ten homes are designated for seniors. The homes have been fully renovated, are fully furnished, "environmentally friendly," accessible and safe, and have three-bedrooms and two baths.

Eligibility for seniors in the GISHS program includes:

- 55 or older, single or married, and able to live independently
- Low-income (50% of the local area's median income; average income for senior residents is \$700/month)
- No criminal background

Master bedrooms are rented to couples or singles for \$445/month and single rooms for \$395/month. Rent includes all utilities and landscaping services. Residents must sign a two-year lease and agree to the GISHS housing policies. Current senior residents include men and women, working and non-working, many ethnicities and backgrounds (including one resident who is Jewish), and those with and without local family. Residents share cooking, cleaning and other home living activities.

GISHS reports the following challenges as most significant for the program:

- Transportation – the shared homes are too far from local bus lines
- Preconceived notions and fears about shared housing
- Making good matches for housemates

- Program awareness

### Senior Cohousing

Denmark originated the model of cohousing and California architects Charles Durrett and Kathryn McCamant introduced it in the US in the 1970's. In its first decades, cohousing was multigenerational, including families with young children. Today there are well over 100 cohousing communities nationwide, and more are in the process of development. In the late 1980's the concept of senior or elder cohousing was introduced and has become an increasingly popular option for Baby Boomers and older adults.

Senior cohousing is a distinct form of intentional community that uses physical design to encourage both social contact and personal privacy. Typically a group shares a property, lives in condos, attached or free-standing homes clustered together, and shares some weekly meals, outdoor space, facilities, and equipment/tools. There is a common house with a kitchen for preparing community or potluck meals, a dining and living room, and other rooms, depending on what the group wants. Options can include a media room, computer office, craft workshops with a kiln or woodworking equipment, art studio, or fitness room. Common houses always include extra bedrooms for guests and caregivers. Cohousing residents stay connected to one another's welfare through living in close proximity and regular social interaction.

There are now senior cohousing communities in California, Colorado, New Mexico, Oklahoma, Virginia, and dozens more are in the development process. The "movement" is attracting people in their 50's, 60's and 70's, including many who still work. Typically senior cohousing residents are in good health when they purchase their homes and move in. Should they become ill or frail or debilitated, there are many helping hands to supplement (though not replace) professional help.

Senior cohousing not only offers the opportunity move to a community where one can age in place, but also to downsize and "go green." Senior cohousing residences are usually more than half the size of a typical new home in the US, occupy 30% less land, and use 50-70% less energy for heating and cooling than a resident's previous home. Attached housing preserves outdoor space, reinforces a sense of community, and sharing resources reduces individual costs.

Residents are in control of what is or is not allowed in the community. They make their own rules and reach decisions by consensus (using board and committee structures). Boomers and seniors can buy a brand new residence in a cohousing community when it is in the development stage or purchase a resale residence.

Senior cohousing can be designed for any income level, and be located in urban, suburban or rural areas, provided the community is close to health care, groceries, banks, etc. Some communities are continually creating new variations and options such as adding affordable housing units as well as rental units.

Presently there are three multigenerational cohousing communities in Tucson, one in Prescott, and another in the development stages in Phoenix.

- **Cohousing (Coho/US), The Cohousing Association of the United States**

Coho/US is a national nonprofit organization dedicated to the development and support of cohousing in the US. Coho/US serves as a clearinghouse for cohousing resources, raises awareness of the benefits of cohousing through national and regional conferences, provides mentoring and technical assistance to developing and existing projects, and facilitates a network of cohousing communities.

### **Concierge Supportive Services**

Many senior services organizations provide a robust menu of in-home supportive services. However, how those services are provided can vary considerably. Services are provided by volunteers, agency staff, or contracted providers. Services can be free, subsidized or offered at fair market value. Concierge programs typically require a membership fee and offer a wide range of in-home supportive services.

- **ElderHelp Concierge Club – ElderHelp, San Diego, CA**

The Concierge Club offers home care services for low- and middle-income seniors who are 60 or older and live in ElderHelp's service area. Membership in the Concierge Club is as low as \$25/month but varies depending on a client's income and the services needed.

A care manager performs an in-home assessment to determine needed services. Major services available include:

- Care coordination
- Friendly visiting and companionship
- Grocery and personal shopping
- Check-in phone calls
- Escorted transportation
- Respite care
- Trusted referrals
- Light housekeeping
- Minor home repairs
- Mail sorting and paperwork
- Pet care/pet pals
- Gardening

Because ElderHelp is a nonprofit organization, individual services can be offered at reasonable rates. The hourly cost breakdown is half of what it would be from an average for-profit home care company.

### **Needs Assessment Tools for Seniors**

Linking older adults to the right services requires an accurate assessment of their needs. Traditionally this work has been done with social workers and case managers. However, costs prohibit using professional staff when financial resources are limited. This has led to the development of new tools for individual needs assessments.

- **Automated Community Resource Referral System (ACRRS) – University of Arizona College of Nursing, Tucson, AZ**

The median age of residents in Green Valley, AZ is 72. La Posada is a senior living residential community located in Green Valley that provides independent and assisted living residences. In 2012, La Posada approached the University of Arizona’s College of Nursing to see if they could develop a tool to identify an individual’s needs and then align those needs with community resources. As a result, the University of Arizona developed the Automated Community Resource Referral System (ACRRS).

ACRRS is an electronic tool that utilizes an interactive approach with the client. It is divided into several needs areas, such as transportation and emotional health, and it expands community resources to include prevention services. After completing the ACRRS, an older adult will have a personal prescription of services.

ACRRS can be accessed at Community Connect, a “one-stop shop” to learn about local older adult services, located in a shopping mall storefront, established by La Posada in December of 2012. ACRRS will also be available online for individual access or with case manager assistance.

### **Senior Center Improvement Training**

Much has been reported about senior centers failing to meet the changing needs of older adults and Baby Boomers. Surveys reveal that the appeal of senior centers has diminished. Consequently there are efforts to improve or revamp what senior centers offer and how they operate.

- **Cutting Edge Strategies for Senior Centers - Coming of Age, Philadelphia, PA**

Coming of Age helps 50 plus seniors envision their future and connect and contribute to their communities, as well as help nonprofit organizations capture the energy and expertise of this population. Coming of Age is a partnership among the Intergenerational Center at Temple University, Public Broadcasting System (PBS) station WHYI, AARP Pennsylvania, and United Way of Southeastern Pennsylvania.

Cutting Edge Strategies for Senior Centers offers a one-day training workshop, brought to communities across the country, for senior center staff and board members, volunteers and others involved in strategic planning and programming for older adults. Participants learn how to:

- Create a new, compelling identity, and effective programs;
- Attract broader audiences;
- Enhance a center's value to the larger community;
- Assess their center's strengths, weaknesses, opportunities and threats (a SWOT analysis);
- Utilize new methods for obtaining funding and promoting a senior center; and
- Seek technical assistance to develop and implement their plans.

### **Discounts for Seniors**

Businesses understand the economic power of the growing older adult population. They are reaching out to Baby Boomers and seniors in new and creative ways.

- **Sciddy.com**

Sciddy.com is a website for seniors and Baby Boomers looking to save money. Sciddy offers senior discounts, daily deals, coupons and promotions on everything from groceries, retail stores, travel, restaurants, adult education, home maintenance and repair services, automotive services, financial, legal and tax services, to pet care services, and more. Deals are offered in neighborhoods and cities across the country.

Seniors enter their zip code on the website and a list of local businesses appears, along with a daily deals section and coupons. Seniors can also submit to Sciddy local discounts and deals of which they are aware. Presently, the largest number of discounts listed is in the cities of Nashville, TN, Oklahoma City, OK, South Florida, and Austin, TX.

The same Sciddy discounts can be accessed on iPhones through the Sciddy App. The Sciddy.com website also hosts a senior blog with senior news and online games.

### **Mobile Services**

“Taking the show on the road” is a strategy entrepreneurs use to bring services to where seniors live. In senior living communities, for example, physicians (particularly dermatologists and podiatrists) and nurses routinely schedule days to be stationed at the residential facilities. Vendors bring their wares (senior safety equipment, clothing, etc.) to senior communities. Mobile dentistry is gaining traction throughout the country. With creativity and solid business planning, for-profit service providers can find ample opportunity to benefit homebound seniors while achieving their business objectives.

- **To Your Door In-Home Spa & Salon for Seniors – Tigard, OR**

This for-profit business provides mobile in-home salon and grooming services for homebound seniors or those who have transportation challenges. To Your Door offers a menu of hair services, pedicures and manicures, waxing and hair removal, massage therapies, and facial services.

#### **IV. Unmet Needs of Local Jewish Seniors**

The research and information gathering efforts undertaken for this Study were designed for the ultimate purpose of identifying and prioritizing unmet needs of local Jewish seniors. Direct and indirect evidence of needs and, most importantly, whether or not they are being met, were inferred from:

- Review of relevant demographic data and seniors needs assessment studies
- Review of the major local senior service providers, including
  - Jewish organizations
  - Governmental agencies
  - Nonprofit organizations
  - General categories of for-profit providers
  - Synagogues and Jewish congregations
- The thoughts and opinions of local
  - Residents, primarily Jewish Baby Boomers and older adults
  - Jewish family caregivers
  - Rabbis
  - Senior services providers and practitioners
  - Experts in the field of aging services

The Senior Services Task Force (SSTF) considered and discussed this large body of information. As a result, the following seven priority unmet needs and five additional unmet needs were identified.

##### A. Identified priority unmet needs/gaps in senior services

- **Affordable and user-friendly transportation options**

Existing transportation options for older adults in Greater Phoenix are patchy. For example, options are adequate in some geographic areas but lacking in others, and transportation is available to some senior centers but not to others. A few cities have cab coupon or taxi voucher programs but most do not. Many volunteer-based programs only offer rides to seniors for medical appointments or grocery shopping. Private transportation services are cost prohibitive for many seniors.

Valley Metro bus service is lacking or sparse in parts of Greater Phoenix, such as in north Scottsdale, Cave Creek, Carefree, the Southwest Valley, and Sun Lakes. For many reasons, utilizing the Valley's public bus system is often too arduous an undertaking for older adults. Dial-a-Ride services are presently disjointed throughout the metropolitan area. Transfers are required between different jurisdictions and eligibility criteria vary between different Dial-a-Ride programs. And as with many multiple passenger

paratransit services, the wait times for pick-ups and multiple stops can be particularly frustrating and onerous.

Many older adults opt to stay home due to lack of transportation or lack of user-friendly and/or affordable transportation. This increases social isolation and the likelihood of depression.

- **Sufficient and accessible socialization programs to address isolation**

Older adults who live alone and/or are homebound due to lack of transportation, money, health or ambulation limitations, are often socially isolated. Lack of regular interaction with other people can lead to loneliness and depression.

While some senior and community centers provide limited transportation for older adults to attend socialization programs, many do not. Similarly, many events sponsored by community organizations that could serve as socialization opportunities for older adults do not offer transportation assistance.

- **Sufficient and user-friendly information on available senior resources and services**

If seniors are unaware or poorly educated about the services available to them, it is essentially as if the services did not exist. Without sufficient awareness of local services and how to access them, some older adults will wait for a crisis before they are forced to desperately investigate options for help.

In spite of the marketing and publicity efforts of many service providers, many seniors remain ignorant or confused about local services. Providers' outreach efforts may fall short for various reasons.

Technology is often cited as a barrier to learning about and accessing services. Many older seniors either do not have a computer or do not use one with much proficiency. For these seniors, online information searches and/or accessing online service directories are not possible.

Seniors often cite the difficulty of having to investigate available services from multiple sources, need by specific need. Navigating the web of older adult services can be a daunting experience.

- **Services and programs targeted for Jewish older adults who do not reside in Scottsdale or Phoenix**

The vast majority of programming for Jewish older adults in Greater Phoenix occurs in the Scottsdale and Phoenix areas. There are many explanations for the limited geographic reach of Jewish-based services. As a result, the prevailing perception is that there is a palpable shortfall of Jewish programming for older adults residing outside of Scottsdale and Phoenix.

Jewish Baby Boomers and older adults in the Sun Cities area, other West Valley locations, the East Valley, and Sun Lakes are among those who feel particularly underserved. Jewish service provider organizations also acknowledge the unmet needs of seniors in certain geographic areas of Greater Phoenix.

- **Affordable in-home services, including respite care, guided by sufficient case management**

The ability to age in place, something desired by the vast majority of older adults, requires the availability of needed in-home services. Plenty of options exist for older adults and their caregivers if they can afford to hire private home care agencies. Individuals with long term care insurance who activate their policy benefits can usually also afford in-home care. There are some nonprofit home care providers in Greater Phoenix (far fewer than for-profits), but their rates for hourly service may still be out of reach for those with limited means.

For those who need in-home supportive services and are neither affluent nor long term care policy holders, there are programs to provide subsidized care. Whether these programs are funded by the government, nonprofits or private sources, their availability is severely limited. Funding falls significantly short of need, is unpredictable and, consequently, wait lists for clients can be extremely long.

To be most effective, in-home services should be guided and coordinated with ongoing case management. Professional assessments of seniors' needs, identification of and assistance with securing appropriate services, and continual monitoring of the safety and wellbeing of older adults are extremely important for those receiving in-home services. Such case management functions, however, are often not provided by home care companies (unless they are requested and paid for separately). Funding to social service agencies that provide case management is grossly insufficient.

- **Advocacy for vulnerable older adults, especially those without local family and/or who reside in skilled nursing facilities**

It is fairly common for Jewish older adults residing in Greater Phoenix to have no local family. With a high percentage of people moving to the area at retirement age, adult children or other close family relatives often reside elsewhere.

It is difficult to speak for oneself when ill or in a compromised situation in a hospital, rehabilitation or skilled nursing facility. Communicating displeasure, discomfort, desires, or asking questions may not be possible. In these situations, without local family members to serve as advocates, older adults are severely disadvantaged.

Individuals who are clients of social service organizations may receive limited advocacy intervention from a case manager or social worker. Aside from this, there are no formal programs to address the advocacy needs for vulnerable Jewish older adults in Greater Phoenix.

- **Affordable and conveniently located adult day health centers**

Adult day health centers, run by for-profit companies or nonprofit organizations, are not found in all areas of metropolitan Phoenix. As of June 2014, when the Foundation for Senior Living closed its Scottsdale facility, there is no longer an adult day center in Scottsdale (it is possible one or two very small scale operations have recently opened in Scottsdale churches).

Most areas of Greater Phoenix have limited options for adult day health programs, and those programs may or may not be appropriate or accessible for those in need. For example, some centers do not provide transportation and some may be too costly (financial assistance eligibility and health insurance benefits are very limited).

In Greater Phoenix, it is not uncommon that the best and most appropriate adult day program for an individual is located at a considerable distance. Many people find it too onerous or impossible to travel 45-75 minutes, one way, to attend an adult day program.

B. Additional identified unmet needs

During the course of identifying priority unmet needs, the Senior Services Task Force identified additional unmet needs deemed worthy of mention.

- **More varied, higher caliber, intellectually stimulating adult education classes and programs**

There are many lifelong learning programs for older adults throughout Greater Phoenix, including Jewish adult education programs sponsored by the Bureau of Jewish Education and area synagogues and congregations. Yet during the course of this Study, a significant number of Baby Boomers and older adults expressed the desire for greater diversity and sophistication of topics, and higher caliber delivery of programs. Many

Jewish residents of independent living facilities reported a dearth of genuinely stimulating educational programming in their communities. Related to a priority unmet need discussed in the preceding section, many comments were received about certain geographic areas lacking sufficient adult educational programming.

- **More robust older adult services and programs at the JCCs**

A commonly shared perception during the course of this Study was that neither the Valley of the Sun JCC or the East Valley JCC provided sufficient services and programs for older adults. Budgetary constraints were most often cited as the likely cause, as well as the high priority placed on serving young families with pre-school age children.

Many older adults expressed disappointment with the quantity and quality of JCC older adult programs and the lack of transportation to assist with participation. Many comments were shared about looking to JCCs in other Jewish communities to see how they are better serving their older adult clientele. Suggestions were made to partner with local senior residences (to bring in more participants), include an adult day health program, Silver Sneakers (exercise program), more opportunities for people to meet and mingle and, importantly, transportation services.

- **Meaningful and fulfilling community engagement and volunteer opportunities for Baby Boomers and older adults**

Aging services experts and practitioners, Baby Boomers and older adults all concur that Boomers and older adults desire meaningful community engagement and volunteer opportunities (going beyond rote duties such as greeting visitors and sorting mail). As Boomers enter their senior years and the number of older adults swells, the need to provide these kinds of opportunities will intensify. There are currently a few local programs, such as Experience Matters and AARP's Experience Corps, that intentionally address the need for meaningful community engagement for mature adults. Much more will need to be done, however, to address this anticipated pressing need. Jewish organizations wishing to garner the services and expertise of Jewish older adults will need to meet this challenge as well.

- **Jewish Continuing Care Retirement Community or assisted living group homes that are affordable (but not restricted to low-income)**

The only Jewish-sponsored senior housing in Greater Phoenix is Kivel Campus of Care, in central Phoenix, and its associated assisted living group home, The Retreat, in Scottsdale. There is no Jewish-sponsored skilled nursing facility.

Kivel is a HUD Section 202 senior residence, and therefore its independent and assisted living apartments are available only to qualifying low-income seniors and adults with disabilities. Kivel presently provides kosher meals to all residents in assisted living. For independent living residents, an optional kosher meal plan may be purchased. Kosher meals are available upon request at The Retreat.

Information gathered during this Study included conflicting opinions about whether an affordable, but not restricted to low-income, Jewish-sponsored CCRC is needed (one that includes a skilled nursing facility). Strong opinions were voiced both in favor of and against addressing the need. Proponents for a Jewish CCRC generally cited:

- the desire for Jewish older adults to age in a familiar, comfortable, and nurturing environment, with Jewish programming and culture (including kosher food); and
- the need for Jewish senior housing in a more impactful geographic area, such as Scottsdale.

Those who did not feel a Jewish CCRC is needed cited:

- numerous local independent living, assisted living and skilled nursing residences with notable numbers of Jewish residents and various degrees of Jewish programming;
- the very small number of Jewish older adults who desire kosher meals; and
- the very high cost necessary to create a Jewish CCRC and how using those resources for other senior services would be more prudent.

- **Adult day health programs with dignified and beneficial memory care programs for those with early onset and/or early stage dementia or Alzheimer's disease, and programs for those with physical, rather than cognitive, impairments**

A specific frustration heard during the course of this Study was the lack of early stage programs that cater to those with early onset and/or that provide meaningful and dignified activities. The needs of those in the early stages of dementia or Alzheimer's disease are particular and require carefully tailored approaches and activities. A common complaint of those in the early stages (as well as of their family members) is that adult day programs are at best uninteresting and at worst insulting and undignified.

Those with early onset dementia or Alzheimer's disease are younger than 65, often in their 40's and 50's. They are often hesitant or not comfortable attending programs with people who are mostly in their 80's and 90's; younger adults are typically more physically robust and active and desire engagement in meaningful activities that allow them to feel a sense of purpose and contribution. There are very few adult day programs specifically for these individuals at present, although the need is well documented and organizations, such as the Banner Alzheimer's Institute and the

Alzheimer's Association – Desert Southwest Chapter, are reportedly addressing the issue.

There are very few adult day programs in Greater Phoenix for people with physical impairments. It is often not possible for people to travel long distances to participate in one of the few programs. For many older adults with physical challenges, the only options are to participate in general day programs that, in essence, are designed for and cater to individuals with cognitive impairments. Many people with physical challenges find it frustrating and unfulfilling to participate in programs with those who are experiencing memory problems. The needs and abilities of those with physical impairments are distinct and deserve targeted programming.

## **V. Conclusion**

The Senior Services Taskforce's work is currently being utilized to develop programs and initiatives that meet the needs seniors identified. Senior Services specifically Socialization, Information and Referral and Transportation were identified in the fall of 2014 as a Core Interest Area for Federation Program Funding. It is our goal over the next 3-5 years to create real solutions to the needs identified thereby making life better for seniors living in the Valley.

## **VI. Appendices**

### **Appendix 1 – Members of the JCA Senior Services Task Force**

Richard Gottlieb – *chairperson of JCA Senior Services Task Force*

Liz Bornstein

Linda Buscemi

Flo Eckstein

Barbara Goldberg

Harriet Gottlieb

Rachel Isaacs

Rich Kasper

Emily Kile

Natalie Lang

Joan Lowell

Andrea Martinez

Sheryl Quen

Harriet Rosen

Cindy Saperstein

Don Schon – *JCA board member and chairperson of JCA Community Planning Commission*

Mike Snitz

Dave Tinkelman – *JCA Treasurer*

Amy Tyre

Randy Weiss

Connie Wolf

#### **Ex-officio**

Lisa Kaplan – *JCA Director of Planning and Agency Relations*

Stuart Wachs – *JCA President and CEO*

## **Appendix 2 - In-Person Interviews with Service Provider Agencies and Organizations**

All interviews were conducted in-person unless otherwise noted.

*\*\* Interview conducted via telephone*

### **Jewish organizations (13)**

- Jewish Family & Children's Service
- Jewish Family Home Care of Arizona (under the auspices of JFCS)
- Chris Ridge Senior Enrichment Center (under the auspices of JFCS)
- Kivel Campus of Care
- The Retreat (under the auspices of Kivel)
- Valley of the Sun Jewish Community Center
- East Valley Jewish Community Center
- Bureau of Jewish Education
- Jewish Free Loan
- Smile on Seniors
- Phoenix Holocaust Survivors' Association
- Sun City Grand Shalom Club
- \*\*Jewish Social Connection

### **Governmental Agencies (4)**

- City of Scottsdale Senior Services
- Via Linda Senior Center
- Granite Reef Senior Center
- Maricopa Associated Governments

### **Nonprofit Organizations (8)**

- Duet
- Benevilla
- Neighbors Who Care
- Foothills Caring Corps
- East Valley Adult Resources
- Foundation for Senior Living
- Area Agency on Aging
- Hospice of the Valley

### **Appendix 3 – In-Person Interviews with Jewish Congregational Leaders/Rabbis**

*\*\* Interview conducted via telephone or email*

**Rabbi Leo Abrami** - The Jewish Fellowship (non-denominational), West Valley

**\*\* Rabbi Arthur Abrams** – Beth Ami Temple (reform), Paradise Valley

**\*\* Hannah Adelman, layleader** - Religious services in senior residences (non-denominational)

**Rabbi emeritus, Mark Bisman** - Har Zion Congregation (conservative), Scottsdale

**Rabbi Micah Caplan** – Congregation Or Chadash (conservative), Scottsdale

**\*\* Rabbi Judy Del Bourgo** - Har Zion Congregation (conservative), Scottsdale

**Rabbi Rony Keller** - Congregation Beth Israel (reform), Scottsdale

President, Board of Rabbis of Greater Phoenix

**Rabbi Bonnie Koppell** - Temple Chai (reform), Phoenix

**Rabbi Robert Kravitz** - JFCS Hospital Chaplaincy Program (non-denominational), Greater Phoenix

**Rabbi Arthur Lavinsky** – Temple Beth El (conservative), Phoenix

**Rabbi John Linder** - Temple Solel (reform), Paradise Valley

**Rabbi David Rebibo** - Beth Joseph Congregation (orthodox), Phoenix

**Rabbi Martin Scharf (retired)** - Kivel Campus of Care (non-denominational), Phoenix

**\*\* Rabbi Bonnie Sharfman** - Kehillah Congregation (reform), Scottsdale

Immediate Past-President, Board of Rabbis of Greater Phoenix

**Rabbi Dean Shapiro** - Temple Emanuel (reform), Tempe

**Sharona Silverman, Director** - Temple Chai's Shalom Center

**Rabbi Irwin Wiener** - Congregation Beth Chaverim (reform), Sun City West

Sun Lakes Jewish Congregation (reform), Sun Lakes

## Appendix 4 – Senior Services Provider Questionnaire

Jewish Community Association of Greater Phoenix  
**SENIOR\* SERVICES PROVIDER QUESTIONNAIRE**

\*65+ years of age

**Agency/Organization:** [Click here to enter text.](#)

**Service or Program** (please complete one form for each service or program:

[Click here to enter text.](#)

**Form completed by** (name and position): [Click here to enter text.](#)

**How long have you been providing this program/service in this area?**

[Click here to enter text.](#)

**Who else in this area provides the same or similar service?**

[Click here to enter text.](#)

**Number of clients served:**

Please specify numbers served, unduplicated, and whether this number is per day, week, month or year.

[Click here to enter text.](#)

## Your Clients

Provide the following information *to the best of your knowledge.*

**Please approximate the percentages** of the clients you serve in this program who fit the following categories:

**Gender:**

Female [Click here to enter text.](#)

Male [Click here to enter text.](#)

**Religious Affiliation:**

Christian [Click here to enter text.](#)

Jewish [Click here to enter text.](#)

Muslim [Click here to enter text.](#)

Other [Click here to enter text.](#)

**Ethnicity:**

European-American [Click here to enter text.](#)

African-American [Click here to enter text.](#)

Hispanic-American [Click here to enter text.](#)

Asian-American [Click here to enter text.](#)

Native American Indian [Click here to enter text.](#)

Other (please identify specific ethnic groups you serve in notable numbers)

[Click here to enter text.](#)

**Age:**

65-74 [Click here to enter text.](#)

74-84 [Click here to enter text.](#)

85+ [Click here to enter text.](#)

**Annual income:**

Below poverty (<\$15,499) [Click here to enter text.](#)

Low (\$15,500 - \$23,499) [Click here to enter text.](#)

Middle-low (\$23,500 - \$46,499) [Click here to enter text.](#)

Middle (\$46,500 - \$74,999) [Click here to enter text.](#)

Middle-high (\$75,000 - \$99,999) [Click here to enter text.](#)

High (greater than \$100,000) [Click here to enter text.](#)

**Overall health status (physical/mental):**

Very well (no major issues) [Click here to enter text.](#)

Good (a few issues, but they manage okay) [Click here to enter text.](#)

Fair (quality of life noticeably reduced; some intervention required) [Click here to enter text.](#)

Poor (quality of life seriously impaired) [Click here to enter text.](#)

**Clients' geographical residences (*please read options carefully*):**

Anthem or New River [Click here to enter text.](#)

Carefree or Cave Creek [Click here to enter text.](#)

Chandler or Tempe [Click here to enter text.](#)

Sun Lakes or Queen Creek [Click here to enter text.](#)

East Valley (Apache Junction/Gilbert/Mesa) [Click here to enter text.](#)

Fountain Hills [Click here to enter text.](#)

Glendale [Click here to enter text.](#)

Northwest Valley (Peoria/Surprise) [Click here to enter text.](#)

Paradise Valley [Click here to enter text.](#)

Central Phoenix [Click here to enter text.](#)

North Phoenix [Click here to enter text.](#)

*(list continued on next page)*

North Scottsdale [Click here to enter text.](#)  
Scottsdale [Click here to enter text.](#)  
Southwest Valley (Avondale, Litchfield Park, Tolleson) [Click here to enter text.](#)  
Sun Cities (Sun City, Sun City Grand, Sun City West) [Click here to enter text.](#)  
El Mirage or Youngtown [Click here to enter text.](#)  
Other (please explain) [Click here to enter text.](#)

**Domicile Occupants:**

Lives alone [Click here to enter text.](#)  
Lives with spouse/others [Click here to enter text.](#)

**Residence type:**

Apartment, condominium, home [Click here to enter text.](#)  
55+ retirement/"active adult" planned community [Click here to enter text.](#)  
Independent senior living [Click here to enter text.](#)  
Assisted living facility [Click here to enter text.](#)  
Skilled nursing facility [Click here to enter text.](#)  
Hospice [Click here to enter text.](#)  
Other (please explain:) [Click here to enter text.](#)

**Service Capacity**

**Is this service presently operating at capacity?**

Yes   
No

**If yes, would you increase the numbers of clients you serve if you could?**

Yes  What would you need to accept more clients? [Click here to enter text.](#)  
No

**Service Accessibility**

**Is transportation required for clients to receive this service?**

Yes   
No

**If yes, do you assist clients with meeting this need?**

Yes

No

**If yes, how do you accomplish this?** (Check all that apply)

Door-to-door transportation provided by your organization

Assist clients with transportation options and arrangements

Other

Please explain. [Click here to enter text.](#)

**Is there a fee for this service?** Yes No

If yes, please provide details of the fee, including whether you provide or make referrals for financial assistance. [Click here to enter text.](#)

**Are there eligibility criteria for clients to receive this service?** Please describe.

[Click here to enter text.](#)

**How are services advertised to your client population?**

[Click here to enter text.](#)

## **Service Quality and Efficiency**

**What are the obstacles you encounter, if any, to improving the quality of your service?** [Click here to enter text.](#)

**Under ideal conditions, how could the delivery of this service be made more efficient?** [Click here to enter text.](#)

**With what other organizations do you coordinate in order to provide this service?**

[Click here to enter text.](#)

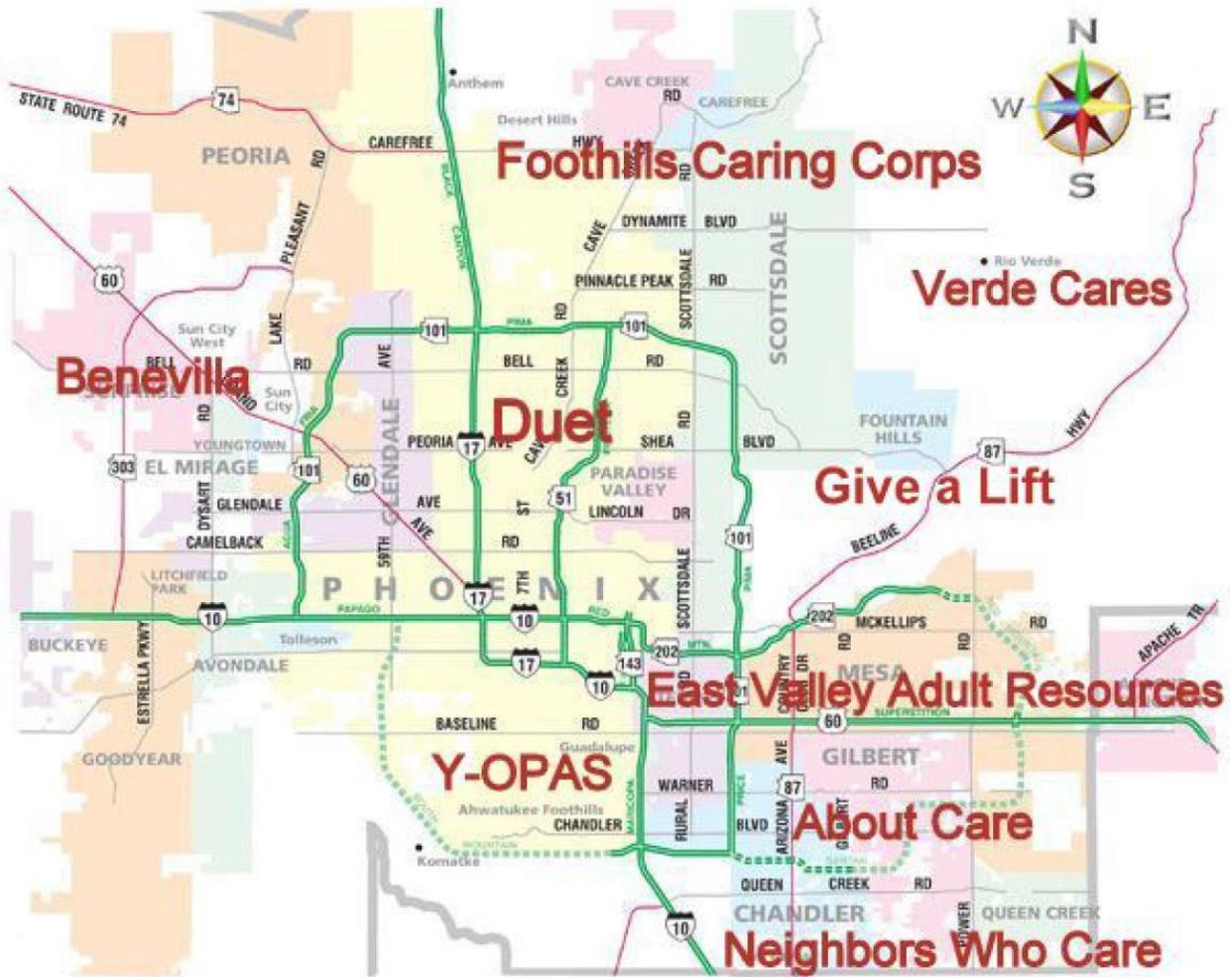
## **Funding Sources**

**Please list all funding sources that enable you to provide this service.**

[Click here to enter text.](#)

## **Additional Information**

**Appendix 5 – Map and Chart of Nonprofit Volunteer Programs Serving Seniors**



# Network of Volunteer Nonprofits Serving Seniors

Nine dynamic organizations promote aging in place in Maricopa County by recruiting and training caring volunteers, and matching them with elders and adults with disabilities who do not drive. All services except meals are provided at no charge, although donations are welcomed. In 2012 these causes provided 38,175 rides to medical appointments and delivered 159,693 hours of service. These networks of care collectively helped 3,582 unduplicated individuals through 2,419 volunteers.

Name	Phone	Website	Service area	Visits	Phoning	Grocery shopping	Rides to medical appts	Paperwork assistance	Other Errands	Respite	Computer assistance	Minor home repairs or safety assessments	Meals
About Care	480-802-2331	<a href="http://www.aboutcare.org">www.aboutcare.org</a>	Chandler, Gilbert	X	X	X	X	X	X	X	X	X	
Benevilla	623-584-4999	<a href="http://www.benevilla.org">www.benevilla.org</a>	Peoria, Surprise, Sun Cities, El Mirage, Youngtown; shopping: Goodyear and Avondale	X	X	X	X	X				X	X
Duet	602-274-5022	<a href="http://www.duetaz.org">www.duetaz.org</a>	Phoenix, Fountain Hills, Glendale, Paradise Valley, Peoria, Scottsdale	X	X	X	X	X		X	X	X	
East Valley Adult Resources	480-966-9704	<a href="http://www.evadultresources.org">www.evadultresources.org</a> (no spaces)	Mesa, Tempe, Gilbert, Chandler, Apache Junction	X	X	X	X	X					X
Foothills Caring Corps	480-488-1105	<a href="http://www.foothillscaringcorps.com">www.foothillscaringcorps.com</a> (no spaces)	Carefree, Cave Creek, North Scottsdale, Phoenix N. of Jomax	X	X	X	X	X	X	X	X	X	X
Give-a-Lift	480-816-5108		Fountain Hills			X	X		X			X	X
Neighbors Who Care	480-895-7133	<a href="http://www.neighborswhocare.com">www.neighborswhocare.com</a> (no spaces)	Sun Lakes, South Chandler	X	X	X	X	X	X	X	X	X	X
Verde Cares	480-540-1312	<a href="http://www.verdecares.org">www.verdecares.org</a>	Verde communities	X	X	X	X	X	X	X	X	X	X
Y-OPAS	602-212-6088		Ahwatukee	X	X	X	X	X		X			

**Appendix 6 – Hard Copy Questionnaire for Seniors, Baby Boomers and Caregivers**

**JCA Senior Services Study  
Questions for Jewish Older Adults,  
Baby Boomers, and Family Caregivers of Older Adults**

Your name and telephone # and/or email address *(optional)*:

Your age:

Are you a caregiver for a spouse, partner or elderly parent?

City of residence:

Are you a seasonal resident?

What kinds of services do you believe are most needed by older adults in our community?

What kinds of services do you believe are desired specifically by Jewish seniors in our community?

What services do you think are lacking or need to be improved?

Do you think there are barriers or obstacles to seniors seeking or receiving services? Please explain.

What ideas do you have to improve services for seniors in our community?

Anything else you would like to share with respect to services for older adults?

## **Appendix 7 - Online Senior Services Survey – Questions**

### **1. Your age**

- Under 40
- 40-54
- 55-64
- 65-74
- 75-84
- 85+

### **2. Your gender**

- Male
- Female

### **3. Your current marital status**

- Co-habiting/partnered
- Never married
- Married
- Widowed
- Divorced

### **4. Your current residential situation (Please check all that apply)**

- Live alone
- Live with spouse, partner or significant other
- Live with other family members
- Live in a private home, apartment or condominium
- Live in 55+ active adult community
- Live in a senior independent living community
- Live in an assisted living or skilled nursing residence
- Other (please specify) \_\_\_\_\_

**5. Do you live in Greater Phoenix for more than 4 months a year?**

- Yes
- No

**6. What is the zip code of your residence in Greater Phoenix?**

\_\_\_\_\_

**7. What is your total household income, including all earners in your household?**

- \$35,000 or below
- \$35,000 - \$50,000
- \$50,000 - \$100,000
- \$100,000 - \$150,000
- \$150,000 or above
- Decline to state

**8. What is your employment status? (Check only one)**

- Work full-time
- Work part-time
- Retired
- Professional volunteer
- Unemployed involuntarily (laid off, lost job, etc.)
- Unemployed voluntarily (choose not to work)
- Other \_\_\_\_\_

**9. Do you have adult children?**

- Yes
- No

**10. If yes, does one (or more) of your children live locally in Greater Phoenix?**

- Yes
- No

**11. Do you presently have caregiving responsibilities?**

- Yes
- No

**12. If yes, who do you care for?**

- Adult parent(s)
- Grandparent(s) or other relative(s)
- Spouse, partner or significant other
- Disabled adult child(ren)
- Friend(s) or neighbor(s)
- Other \_\_\_\_\_

**13. Do you believe you will become a caregiver in the future, or again (if you answered yes to question 11)?**

- Yes
- No

**14. If yes, who do you anticipate caring for?**

- Adult parent(s)
- Grandparent(s) or other relative(s)
- Spouse, partner or significant other
- Adult child(ren)
- Friend(s) or neighbor(s)
- Other \_\_\_\_\_

**15. What is the best way to inform you of programs and services offered for people 55+?  
(Check up to five)**

- Email
- U.S. mail
- Website
- Newspaper
- Radio
- Television (local channels)
- At senior community centers
- Senior organization newsletters
- Homeowners' association newsletters
- Other \_\_\_\_\_

**16. Which older adult services do you currently utilize most or believe you might utilize most in the future? (Check up to five)**

- Recreational activities
- Social activities
- Cultural events
- Health, wellness and exercise programs
- Social services supports (counseling, support groups, meal delivery, financial assistance, etc.)
- In-home services (housekeeping, assistance with personal care, meal preparation, minor home maintenance, etc.)
- Transportation
- Low-income senior housing options
- Senior housing options (independent living, assisted living or skilled nursing facility)
- Adult day center programs (for people with memory disorders or physical impairments)
- Respite care to provide occasional relief from caregiving duties

Other \_\_\_\_\_

**17. What do you believe are the older adult service needs that are the most important for our community to address now? (Check up to five)**

- Information and referral (to find services and answers to questions about service needs)
- Socialization (to address isolation and loneliness)
- Transportation
- Affordable senior housing/residential options
- Jewish senior housing/residential options
- In-home support (housekeeping, personal care, assistance with errands, paperwork, home repairs, etc.)
- Case management (assessment of needs, service referrals and coordination)
- Counseling and support groups
- Adult education
- Health and wellness programs
- Senior/community centers with quality programming
- Adult day care and caregiver respite programs
- Other \_\_\_\_\_

**18. Other thoughts or comments you would like to share about how the Phoenix Jewish community can best meet the needs of seniors to enable them to age well at home and seek other assistance when staying at home is no longer an option?**

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## Appendix 8 - Online Senior Services Survey – Details of the Responses

### RESULTS OF JCA SURVEY ON SENIOR NEEDS - JULY 2014

Total survey responses = 1130

#### **BY ZIP CODE** (1,126 responses)

##### **Scottsdale (total) – 491 (44%)**

South – 64

Mid – 304

North - 123

##### **Phoenix (total) – 326 (29%)**

Central – 251

North – 43

Ahwatukee – 13

Downtown – 10

South Mountain - 5

##### **East Valley (total) – 193 (17%)**

Chandler – 47 (4%)

Tempe – 42 (4%)

Mesa – 31 (3%)

Gilbert – 15 (1%)

Sun Lakes – 14 (1%)

Queen Creek - 2 (<1%)

##### **West Valley (total) – 68 (6%)**

Surprise – 17 (2%)

Sun City – 13 (1%)

Peoria – 14 (1%)

Sun City West – 11 (1%)

Glendale – 6 (<1%)

Tolleson – 2 (<1%)

Buckeye – 2 (<1%)

Goodyear – 2 (<1%)

Waddell – 1 (<1%)

##### **Paradise Valley – 41 (4%)**

Fountain Hills – 12 (1%)

Anthem – 9 (<1%)

Cave Creek – 9 (<1%)

Maricopa – 4 (<1%)  
Carefree – 1 (<1%)  
Casa Grande – 1 (<1%)  
New River – 1 (<1%)

**Outside of Greater Phoenix (total) - 8**

Other Arizona locations (total) – 4  
    Flagstaff – 1  
    Payson – 1  
    Prescott Valley – 1  
    Dewey – 1  
Out of State (total) – 4  
    California – 3  
    Utah – 1

**Unknown (total) - 2**

**AGE** (1,126 responses)

41% young seniors (65-74)  
22% Boomers (55-64)  
20% seniors (75-84)  
10% middle age (40-54)  
4% older senior (85+)  
3% young (under 40)

**GENDER** (1,126 responses)

69% female  
31% male

**MARITAL STATUS** (1,126 responses)

62% married  
15% widowed  
14% divorced  
4% never married  
4% co-habiting/partnered

**RESIDENTIAL ARRANGEMENT** (1,126 responses)

62% live with spouse/partner  
27% live alone  
8% live with other family members

“Other” comments:

- Pets should have been included in survey
- Adult children live with parents occasionally/on and off (3 comments)
- Roommates

**RESIDENCE TYPE** (1,126 responses)

30% live in private home  
 4% live in 55+ community  
 2% live in independent living  
 0.5% live in assisted living or skilled nursing facilities

“Other” comments:

- RV/travel trailer
- Townhouse complex (2 comments)
- Mobile home park

**SNOWBIRD?** (1,125 responses)

97% live in Greater Phoenix more than 4 months/year

**INCOME** (1,126 responses)

31% declined to state annual income  
 22% earn \$50,000 – 100,000  
 17% earn \$150,000+  
 15% earn \$100,000 - \$150,000  
 8% earn \$35,000 - \$50,000  
 7.5% earn below \$35,000

**EMPLOYMENT STATUS** (1,102 responses)

49% retired  
 27% work full-time  
 15% work part-time  
 5% are volunteers  
 3% voluntarily unemployed  
 2% unemployed (not by choice)

“Other” comments:

- On disability/am disabled or ill (8 comments)
- Semi-retired (5 comments)
- Retired and I volunteer (6 comments)
- What does “professional volunteer” mean?

**ADULT CHILDREN** (1,126 responses)

82% have adult children

59% of those have adult children living locally

**CAREGIVING RESPONSIBILITIES** (1,119 responses)

82% presently do not have caregiving responsibilities

18% presently do have caregiving responsibilities

Of those who do have caregiving responsibilities:

56% of those care for adult parents

26% of those care for a spouse/partner

10% of those care for disabled adult child

7% of those care for a friend or neighbor

“Other” comments:

- Disabled cousin
- I am a paid caregiver (3 comments)
- Care for “underemployed” adult child (2 comments)
- Siblings (5 comments)
- Grandchild (2 comments)
- Pets (3 comments)
- Long distance care for parent/adult child (2 comments)

55% do not believe they will become a caregiver in the near future

45% do believe they will become a caregiver in the near future

Of those who do believe they will become a caregiver in the near future:

61% think they will care for a spouse/partner

37% they think they will care for an adult parent

8% they think they will care for an adult child

5% they think they will care for a friend or neighbor

4% they think they will care for a grandparent or other relative

“Other” comments:

- Siblings (4 comments)
- Grandchildren (2 comments)
- Mother-in-law (2 comments)

**BEST METHOD TO RECEIVE INFORMATION ON PROGRAMS AND SERVICES** (1,056 responses)

86% email

44% US mail  
29% websites  
25% newspapers  
13% local TV  
13% at senior/community centers  
12% organization newsletters  
7% homeowners' association newsletters

"Other" comments:

- Jewish News (14 comments)
- Synagogue newsletters/bulletins (14 comments)
- JCC publications (4 comments)
- JCC e-blasts
- Facebook (3 comments)
- Senior center publications (2 comments)
- Telephone (2 comments)
- Bureau of Jewish Education
- Texting
- AARP
- Area Agency on Aging Senior Help Line

**SERVICES CURRENTLY UTILIZED OR MIGHT BE USED IN THE NEAR FUTURE** (1.023 responses)

62% cultural events  
60% social activities  
55% health, wellness and exercise programs  
50% recreational activities  
30% in-home services  
25% transportation  
24% senior housing  
19% social services supports  
11% respite care  
8% adult day center programs  
6% low-income senior housing

"Other" comments:

- Don't and won't utilize anything because I don't live in Scottsdale! (2 comments)
- Academic and vocational classes (2 comments)
- Students help me with gardening and house cleaning
- Affordable art classes
- Qualified counselors at synagogues and Jewish centers

- Religious classes
- Kosher meals
- Adult day health programs for those with physical (not cognitive) impairments

**MOST IMPORTANT SERVICES FOR JEWISH COMMUNITY TO ADDRESS NOW** (1,050 responses)

- 57% information and referral
- 56% socialization
- 54% transportation
- 50% in-home support
- 43% Jewish senior housing options
- 41% senior/community centers with quality programming
- 37% affordable senior housing
- 30% health and wellness programs
- 23% case management
- 21% adult day care and caregiver respite
- 21% adult education
- 19% counseling and support groups

“Other” comments:

- Jewish senior housing
  - High-end facility
  - With kosher meals (3 comments)
  - Located in the East Valley
  - On a “village” type of campus with other amenities
- High quality assisted living and skilled nursing facilities (2 comments)
- Affordable senior housing (2 comments)
- Subsidized kosher food (3 comments)
- Transportation
  - specifically in the NW Valley
  - particularly at night in Scottsdale
- Group home for adults with Asperger’s Syndrome
- Meals on wheels
- More daytime programming for seniors
- More senior programming that’s not just at Chris Ridge Senior Enrichment Center
- Financial assistance
- Silver Sneakers programs (2 comments)
- Affordable in-home care
- Special attention to seniors without local family
- Legal, financial and tax education programs for seniors

**OTHER THOUGHTS OR COMMENTS ABOUT HOW THE PHOENIX JEWISH COMMUNITY CAN BEST MEET THE NEEDS OF SENIORS** (208 responses)

- Transportation is important (8 general comments)
  - Rides to and from synagogues
  - Night time options are missing (2 comments)
  - Rides to and from JCCs and special events, day and night (4 comments)
  - NW Valley transportation options are lacking (3 comments)
  - Services lacking north of the 101 in Scottsdale
- Subsidized kosher food (3 comments)
- Adult day health programs for those with physical (not cognitive) impairment (2 comments)
- Senior programming during the daytime since many cannot drive at night
- Quality programming in senior centers
- Legal, financial and tax education programs for seniors
- Senior housing
  - Jewish senior housing – CCRC, assisted living, group homes, skilled nursing (11 general comments)
    - In the East Valley (2 comments)
    - In Scottsdale
  - Jewish senior housing connected to a senior/community center (2 comments)
  - Jewish senior housing in NE Valley (3 comments)
  - High-end Jewish senior housing options (3 comments)
  - Kosher Jewish senior housing (4 comments)
  - High quality assisted living and skilled nursing facilities
  - Affordable Jewish senior housing (10 comments)
    - subsidized assisted living and skilled nursing facilities (2 comments)
  - Independent living condos with educational courses, modeled after programs at some prestigious universities
  - Group homes for adults with special challenges
  - The location of Kivel Campus of Care is no longer relevant to current Jewish demographics (2 comments)
- Create a Jewish hospice
- Financial assistance for seniors in need (4 comments)
- Geographic programming issues
  - West Valley senior programs are absent (9 comments)
  - East Valley lacking Jewish cultural activities sponsored by the JCA
  - East Valley is generally ignored (for programming) in favor of Phoenix and Scottsdale (4 comments)
  - Senior programming at locations beyond Chris Ridge Senior Enrichment Center
  - Scottsdale JCC is too far for many (2 comments)

- Affordable in-home supportive services to age in place (3 comments)
- Create a bikur cholim program at the community level to assist those who are homebound
- Create more multi-generational awareness and programming (4 comments)
- Jewish seniors in Greater Phoenix are treated as a lower priority than Jewish youth and families (4 comments)
- JCA has failed to reach out to seniors (5 comments)
  - Contributions are solicited but not followed up with concern and attention (especially in the NW Valley) (2 comments)
  - Closing Kivel's skilled nursing facility and the senior kosher program was shameful
- The East Valley JCC, rather than build a Holocaust museum, should improve the JCC facilities and programming (e.g. gym facilities, swimming pool, tennis courts, etc.)
- Chris Ridge Senior Enrichment Center has had too many funding cuts
- Advocates and extra support are needed for seniors without local family (6 comments)
- Seniors need meaningful, respectful volunteer opportunities at Jewish organizations/facilities
- Volunteers should make home visits to seniors (2 comments)
- JCC in Scottsdale
  - More and better programming is needed
    - including counseling and support groups (2 comments)
    - adult day health programs
  - Membership and programs are too expensive for many seniors
- Information and referral
  - Need a current and accurate resource guide for senior services and programs
  - Need "one-stop" service for information on senior services (2 comments)
  - Need to educate the community about available services
- Need more places for seniors to meet and mingle
- Kosher food accessibility (4 comments)
- Need more resources for caregivers (2 comments)
  - Develop a vetted caregiver referral service (with providers who charge reasonable rates and offer more flexibility than traditional home care companies)
- Synagogues don't support seniors nearly as well as churches
- Synagogues should offer subsidized memberships for seniors
- Need more early to mid-stage programs for people with Alzheimer's disease
- Give more funding to Kivel Campus of Care and JFCS and let them take the lead on serving Jewish seniors in Phoenix (2 comments)
- Need better service coordination among providers
- Need more creative art classes and activities for seniors (2 comments)
  - The only theater in Greater Phoenix showing "arty" films (Harkins Camelview) is too far for many seniors
- Need to do outreach to seniors living in more remote locations, such as Casa Grande, Maricopa, Apache Junction, etc.