



12 Lessons Learned

*from Communities Using the
Viable Futures Toolkit*

JustPartners, Inc.

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Introduction

When a new resource like a toolkit becomes available, it embodies this belief of its writers and those who advised on the project: community change can be facilitated by advancing useful examples of the desired change and proven processes for getting there. In this regard, the **Viable Futures Toolkit** (VFT) is no different. In the first two years of Toolkit availability, communities in over 20 states have used it — either employing particular tools, adopting it in its entirety, or embracing and implementing its strategic point of view.

We have had the privilege to track three particular settings that have gone deep with the VFT and its point of view, embedding it into their organizations' strategies, and launching multi-year commitments to apply it toward better, more inclusive results. These organizations are the Jefferson Area Board for Aging (JABA) in Charlottesville, Virginia; the statewide Arizona Community Foundation (ACF) located in Phoenix; and two Portland, Oregon, offices collaborating on rebuilding the New Columbia neighborhood there — the Housing Authority of Portland (HAP) and Multnomah County Aging and Disability Services (ADSD). We thank them for their vision and their willingness to share what they've learned with the Toolkit's writers. The findings and conclusions presented here are aggregations. As such, they do not necessarily reflect the exact experience of any particular site, except where illustrations are given. We invite you to read more about their particular initiatives in each of their focused case studies, available at www.justpartners.org under Our Products/Age-Inclusive Communities. These lessons also benefitted from what other communities have shared, although less extensively, about their work around the Viable Futures point of view.

Janice Jackson, JPI Senior Consultant and VFT technical assistance provider, is the lead author on this report. Paula Dressel, JPI Vice President, edited it. The content benefitted from extensive conversations with Gordon Walker at the Jefferson Area Board for Aging and Nancy Henkin at Temple University's Center for Intergenerational Learning.

The blue moon fund of Charlottesville, VA, is a primary funder of the Viable Futures Toolkit and its application in pilot sites. We thank them for this support but acknowledge that the findings and conclusions presented here are those of the authors alone. As such, they do not necessarily reflect the opinion of the fund. Please direct any inquiries to pdressel@justpartners.org.

We hope that you will conclude from reading this document that any community can benefit from reading and applying the **Viable Futures Toolkit**. Indeed, **given the financial constraints affecting communities across the nation, this resource is needed now more than ever**. It provides guidance for doing more with less. See for yourself — and for your community what a viable future can be.

“Doing more with less” —

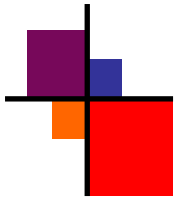
We have turned that too-often trite and cynical phrase into “green,” lean, and viable **concrete steps** that enable communities to address issues across the generations as they:

- honor the limits on our environmental and financial resources, and
- tap into the bountiful capacity of our multi-generational human resources.

The 12 Lessons Learned

- Lesson #1.** *The Toolkit's advantages are its scope and flexibility.*
- Lesson #2.** *It only takes one organization to get things started — but more to realize a vision.*
- Lesson #3.** *You already have allies to enlist — but they need reasons to remain at the table.*
- Lesson #4.** *Plenty of common ground exists — once you intentionally look for it.*
- Lesson #5.** *The Viable Futures approach opens up resources for common-ground issues.*
- Lesson #6.** *Multi-generational families are a key building block for a broader vision.*
- Lesson #7.** *Having guiding values and an explicit framework for action keeps conflicts at bay.*
- Lesson #8.** *Changing traditional policy and practice leads to 'mission accomplished.'*
- 'Lesson #9.** *Change must be nurtured internally, too — not just externally to the community.*
- Lesson #10.** *Proof of the concept is in the work itself — but you must intentionally measure it.*
- Lesson #11.** *You have to get technical about technical assistance.*
- Lesson #12.** *Celebrating success along the way sets the stage for even greater success.*

And now for the details...



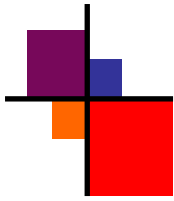
Lesson #1.

The Toolkit's advantages are its scope and flexibility.

There's no single "right way" to use the **Viable Futures Toolkit** or otherwise apply its point of view. Some sites found that introducing the viable futures perspective was most important; others found that using the specific tools that were best aligned with present thinking was most helpful; still others used the toolkit in a more systematic step-by-step process. However it is used, there is general agreement that it can serve these purposes:

- generate excitement and provide direction for the opportunity to step back from every day work and think in new ways
- speak to a broad range of stakeholders
- offer the rationale and substantive "glue" for people to work together
- help to balance a big vision with specific work to get there
- bring the perspective that aging is a lifespan phenomenon and that generations have a great deal of issues in common
- break down a "silo-ed" approach to understanding issues and making decisions for change

So we encourage you to view the toolkit as a guide that can be adapted to YOUR specific circumstances. Use of the complete VFT and application of its point of view are most likely to get traction at the beginning of an initiative because these offer an all-encompassing point of view and a full planning and implementation process. Still, individual tools can be introduced down the road and find good utility. Read the **User's Guide** to help you imagine where and how you can get started.



Lesson #2.

It only takes one organization to get things started — but more to realize a vision.

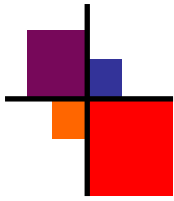
Any organization embracing a broader vision can step up to lead work toward viable futures. The ability to persuade others of the benefits of a collaborative process and the willingness to commit partial staff time to this work are key assets.

In both Charlottesville and Portland, area agencies on aging were the catalysts for bringing the VFT perspective to their communities. In the first instance the CEO, and in the second the Community Services Manager, seized the opportunity for their organizations to have a broader, more inclusive impact. They talked with potential community partners about how an intergenerational and environmentally sustainable point of view could be advantageous for everyone and then committed staff to shepherd the work.

The Arizona Community Foundation led by example through offering funding for concrete intergenerational programming that could promote communities for all ages. When community organizations were actually able to see the results of generations working together to address community needs, they were then more inclined to become part of the initiative.

Single organizations can get the work started, but buy-in from other organizations keeps it going. And buy-in is most likely to occur when each organization realizes the value it adds and has specific tasks to fulfill. In places where the Viable Futures point of view has been advanced and not gotten traction, too often we have seen either 1) single organizations wanting to hold ownership of the work too closely, or 2) a failure to designate formal roles and responsibilities that keep partners at the table with shared accountability.

The **Organizational Self-Assessment** is helpful for identifying your organization's strengths and your readiness to take on a leadership role on behalf of collaborative work around an inclusive vision.



Lesson #3.

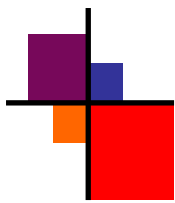
You already have allies to enlist — but they need reasons to remain at the table.

Quite likely your organization is already a member of existing community-based collaboratives or task forces. And no doubt you have many long-established community relationships. It makes sense to advance the value of the **Viable Futures Toolkit** with these allies first. Working around a concrete issue anchors the Viable Futures point of view to everyday realities that make the approach more relevant and understandable for your partners.

In Portland, many of the partners that the area agency on aging invited to the table were experienced with collaborative initiatives and had been involved in county task forces. Although the aging groups may have known one another, most had limited previous experience coordinating work with the housing authority. Still, the climate existed so that working together in a specific neighborhood was approached as a win-win for all involved.

Successful collaboratives must always find ways that partners can achieve their own organizational missions while contributing to a larger agenda. Quite simply, different organizations have different incentive structures. Incentives and processes that kept Portland partners at the table were the coalition's ability to tap into new funding streams, meaningful roles and appropriate recognition for all partners, and shared accountability. In Charlottesville, coalition members stayed because of opportunities to capitalize on retirees as a community resource and economic development stimulus, recognizing that the aging population would present challenges across health and social service systems, or just simply because members had aging relatives who would need a more responsive community sooner rather than later.

The **Coalition Building Tool** can help you identify which existing partnerships and initiatives would make good building blocks for a viable futures collaboration. And the **Organizational Assessment** can generate discussion about what collaboratives may need to do to build on each partner's strengths and interests and further each partner's respective mission and goals.



Lesson #4.

Plenty of common ground exists — once you intentionally look for it.

When an organization raises the question of what hopes, needs, and concerns different groups have in common, it doesn't take long to create a substantial list. The breakthrough is in the asking. And then it's key to continually message these topics in ways that showcase the common ground. That keeps people at the table — and brings even more.

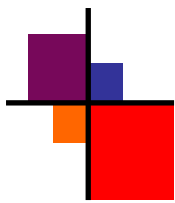
In the course of JABA's planning for an aging community, participants increasingly recognized that a number of concerns that matter to elders matter to others as well. Specific intergenerational issues emerged that were rallying points for the larger community: lack of air conditioning, a near fatal pedestrian accident on a busy city street, and the challenge of access to health and recreational services, particularly in the rural counties. This recognition was the start of revolutionizing the mindset of a wide range of partners in the community.

At New Columbia in Portland, agencies and residents identified four shared issue areas around which specific initiatives were then developed:

- Intergenerational and multi-cultural interaction
- Environmental awareness
- Healthy food preparation and purchasing
- Community safety

And in Arizona, the Community Foundation explicitly required applicants for its dedicated funds to craft proposals based on shared concerns across the generations — which turned out to be concerns shared across cultural groups, too.

The **Community Checklist**, used in conjunction with the **Issue Briefs**, can help identify community challenges and prompt discussion that recognizes common ground. And the **Communications Tool** can help craft an inclusive message for advocacy around the identified concerns.



Lesson #5.

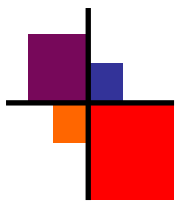
The Viable Futures approach opens up resources for common-ground issues.

The VFT approach encourages you to use existing resources to receive greater returns than otherwise might have been achieved. At the same time, the broadened vision opens up opportunities to decrease duplication and consolidate resources across partners. Further, funders are attracted to ventures that promote the most efficient use of scarce resources.

Charlottesville's aging agency CEO used longstanding relationships to leverage one-time funding for the planning process, some from new sources attracted to the cutting edge nature of the vision, including a number of public-private partnerships. In addition, the engagement of children and youth along with elders makes the work of an area agency on aging more appealing to a broader range of funders. For example, after initial development of an elders-tutoring-youngsters program, funding for its expansion was received from the city and county schools systems — not a traditional source of funding for area agencies on aging.

All of the Arizona communities used their foundation grant as a springboard to leverage additional funds. These supplemental funds supported some of the activities that brought generations together in the various communities.

The **Resource Development Tool** can serve as a guide on how to diversify your resource base. It provides practical, business-oriented approaches, with a particular focus on sustainability. Trainers have used it as a checklist to help groups generate innovative funding ideas.



Lesson #6.

Multi-generational families are a key building block for a broader vision.

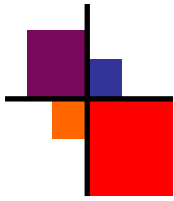
The inclusive approach to community issues promoted by the **Viable Futures Toolkit** is readily embraced by families — they are not segregated by age or function the way organizations can be. Bringing families together to identify common issues and interests across the generations is a good planning strategy.

Several sites funded by the Arizona Community Foundation were impressed with the success of their family events and the frequency with which families requested more of these kinds of opportunities. One site commented that the concept of *la familia* in Latino families naturally is intergenerational, often with up to four generations living together, so programs and services that serve all ages are well received. This Arizona work now considers the family unit as a core building block.

Similar situations occurred at New Columbia neighborhood in Portland, where many of the initiatives that were developed involved youth and their parents and/or grandparents — community engagement activities in New Columbia parks and multi-cultural cooking classes, to name two.

In Charlottesville, JABA's nursing clinic at a senior housing site was expanded into a multi-family public housing neighborhood, thus enabling grandparents to include their grandchildren in the area agency's health prevention programs.

The **Community Checklist** and **Issue Briefs** can be helpful in identifying family-inclusive projects. Building on family interests brings generations together, related or not.



Lesson #7.

Having guiding values and an explicit framework for action keeps conflicts at bay.

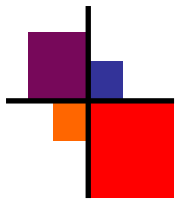
Because this work brings together different organizations with different emphases and operating routines, it is bound to hit spots where those differences become prominent. In collaborations, early agreement on core, underlying values and a framework for action (often called a “logic model” or a “theory of change”) provides an anchor throughout planning and implementation . When differences occur, reference to these values or the framework for action can often resolve issues.

At New Columbia, the following values were developed by the planning group:

- Single interventions should solve multiple problems
- Synergy should result from chosen strategies: $1+1 = \text{much more than } 2$
- Interventions are considered with an eye to the future, not just the present
- Older adults, youth and families all support and are supported by the plans
- Plans complement the green and clean standard

Other communities have lost ground because early agreements weren't in place around the values and strategies that were to keep groups together.

The **Communications Tool** offers useful ideas about commonalities and can help propel conversations about shared values.



Lesson #8.

Changing traditional policy and practice leads to ‘mission accomplished.’

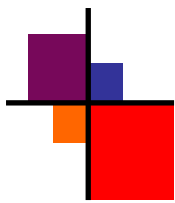
An important part of VFT work for the long-term is changing those institutional policies and practices that serve as barriers to more inclusive strategies. For example, one Arizona community found this situation:

- Local governments issued 41 requests for proposals to fund only single populations around a given issue.
- All 41 of these RFPs focused on issues common across the generations.
- The RFPs precluded intergenerational approaches, thus reinforcing existing age segregation and limiting the reach of available dollars.

On the other hand, when JABA in Charlottesville, VA, got its Department of Transportation involved in pedestrian safety matters on a busy street, it was able to demonstrate the shared concern of residents and businesses. This engagement was so positive and solved problems in ways that satisfied all constituents that the DoT indicated it would use that approach in all of its subsequent planning.

Further, by altering the parameters of its approach to funding, the Arizona Community Foundation opened up opportunities for its communities to think in new and inclusive ways about solving community problems.

Both the **Community Checklist** and the **Resource Development Tool** can serve as catalysts to think about what might be possible in your community and your own organization to reduce “silo-ed” ways of approaching community concerns.



Lesson #9.

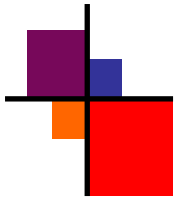
Change must be nurtured internally, too — not just externally to the community.

It's important that staff and Board members become as enthusiastic about the VFT's inclusive approach as community residents or clients are. Advocates for this programmatic approach must be intentional in bringing their colleagues along in the commitment to a broader agenda.

At the Arizona Community Foundation, a focus-spanning initiative was at first considered outside-the-box. The Vice President for Programs saw the potential and the benefits and worked to tell the story within the foundation and to other opinion leaders and philanthropists. She developed a one-page description of the initiative for the foundation's website as well as a presentation to the Board of Directors. She took the opportunity during staff and leadership transitions to describe the philosophy and its impact. Her efforts resulted in unwavering, continued support during a time of change and led to implementation of a second phase of the initiative.

In Charlottesville, the inclusive point of view of the area agency on aging has now become a fundamental commitment in which it has invested both financial and human resources. But that was not before realizing that Board and staff deserved the same kind of deliberation and capacity-building around the point of view that initial programmatic adherents had enjoyed. With all stakeholders on board, emphasis on intergenerational initiatives and sustainability now can be found in the organization's mission statement, statement of purpose, strategic plan, fundraising approaches, publications, website, department goals and employee performance measures.

The **Organizational Assessment** provides a roadmap for identifying changes that might need to be considered at your organization to advance a more inclusive approach that is widely shared.



Lesson #10.

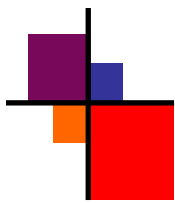
Proof of the concept is in the work itself — but you must intentionally measure it.

The intuitive appeal of the Viable Futures approach is that it can accomplish more with less, while bringing heretofore competing or disinterested groups together. The next step for pilot organizations is to become more intentional and systematic about measuring results — and doing so in ways that capture the complexities of this work. For example,

- Beyond the routine kinds of benefits that ordinarily should be measured (e.g., value to each constituent group), what are the collective goods that should be measured (e.g., denser social bonds, deeper collaboration, a cleaner environment)? How are these best measured?
- How can you calculate the cost of doing business this way versus the cost of doing business the traditional silo-ed way? What else do you need to make the business case for this point of view?
- What can you track in the way of short-term, interim change and process measures while simultaneously keeping your eyes on the longer-term outcomes you seek?

Communities using a Viable Futures approach have encountered the typical barriers that too often stand in the way of results measurement — lack of resources for assessment, more priority given to program activities than results measurement, insufficient capacity for conducting performance measurement, and lack of a logic model that could identify what should be measured. The Arizona Community Foundation committed in its second round of funding to build community capacity around logic models and performance tracking — having learned in round one that such work must be intentional and prioritized.

The **Planning Worksheet** is a useful tool for facilitators to use to help a group keep track of progress.



Lesson #11.

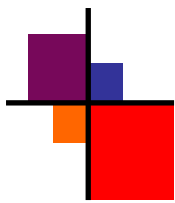
You have to get technical about technical assistance.

Some communities chose to employ technical assistance to move ahead with the Toolkit and its point of view. Facilitators need to be prepared to answer: “Why should we use the toolkit?” and once the point of view is accepted, to help communities understand how to “get there” through practical, concrete ideas and examples.

Any technical assistance should be part of a clear plan, with clear roles, expectations and division of labor for members of the Technical Assistance Team, organizational representatives, and community members. Be sure to clarify who is ultimately responsible for moving the initiative forward. Arizona found that an initiative director/coordinator/manager either within the lead organization or hired externally, could help keep the individual sites moving, oversee the Technical Assistance Team, and keep the larger picture in focus.

Both Charlottesville and Portland agencies had clear delineations of the technical assistance role. One had a Viable Futures Planner as well as other staff dedicated to specific activities within the overall initiative. Lead agency responsibilities for specific goals were formalized, thus creating specific staff assignments within partnering entities, too. The other had a consultant who initially helped community members understand the VFT concepts and potential applicability. Then it hired a facilitator who was responsible for organizing and conducting meetings and who proved to be very effective in fostering an environment conducive to creative thinking and collaboration. Both the consultant and the facilitator were available through dedicated grant funds.

The **Resource Development** tool can help you identify how existing resources might be deployed for this purpose. In addition, funding sources may be more inclined to fund a coalition of organizations with a shared purpose than any single agency with more limited reach.



Lesson #12.

Celebrating success along the way sets the stage for even greater success.

Early successes go a long way to generate support for further activities. The early successes in Charlottesville surrounding the aging agency's Strategic Plan energized the community and were key factors in driving continued progress. For example, the initiative for pedestrian-friendly streets led to proposals for policy changes by the state Department of Transportation, and the early successes with intergenerational projects led to new types of programming and space-sharing in agency facilities.

Intentionally created pocket parks in the New Columbia neighborhood brought together residents and people in the neighboring community for activities and educational events. This helped to portray a positive image of New Columbia to voters and the media, and articles in neighborhood newspapers became more positive. The sponsoring community partners received important visibility, which led to an expansion of the number of pocket parks and new partners participating in VFT planning.

The Arizona Community Foundation's willingness to test a new funding strategy received the attention of funders and advocacy groups beyond the state. This visibility became a helpful ingredient in generating local support for a second round of the initiative.

The **Communications Guide** provides practical steps on how to create messages that highlight the win-win aspects of your initiatives.



Do you have lessons to share from your application of the Viable Futures Toolkit and its point of view? Do you have questions about how to use the Toolkit?

*Please direct comments and inquiries to:
Paula Dressel (pdressel@justpartners.org)*

and be sure to visit

www.viablefuturestoolkit.org

*for the latest information and updates,
as well as case studies of the organizations mentioned
in this publication.*

