PROSPECTUS

REQUEST FOR PROPOSAL
The State of Aging in Central Indiana:
an initiative of Central Indiana Senior Fund

Submission Deadline: 5 PM EST, DEC 21, 2018

Summary

Central Indiana Senior Fund (CISF) Advisory Board seeks the professional expertise of a qualified organization as a research and dissemination partner over three years to prepare and refine a 'State of Aging' report. The report initiative includes creative information dissemination and engagement with senior-serving organizations, civic and public entities and philanthropic organizations.

The report should cover the current status and trends of population aging in Central Indiana with focus on all seniors, regardless of income levels. The specific needs and challenges of seniors with low- or moderate-income should be articulated when the data allows for disaggregation by income. The report should differentiate data, where available, between the 'young-old' (55-64), 'middle-old' (65-84) and 'old-old' (85+).

Please note the list of anticipated data sources (Appendices A and B) and the expectation that various data sources will not have uniform methods of data collection and reporting. Data limitations must be noted and in many cases data triangulation between local, state, and national sources will be required. The report should strike a balance between customary 'basic needs' assessments and a growing body of literature about the aspirations, contributions and opportunities of purposeful living in later life.

The successful contractor will be a reputable, longstanding organization willing to serve as a depository of accumulated data over subsequent biennial reports. The contractor may engage independent sub-contractors for various components of the work subject to approval by the Board.

CISF desires a contractor who will become a **partner** deeply embedded in better equipping CISF, other senior-serving organizations, philanthropic funders and civic and elected leaders with the very best intelligence about one of the most structurally changing and far-reaching societal changes Central Indiana will experience this century.

Foreword from CISF Chairman H. Kennard Bennett Esq.

CISF is the only philanthropic fund focused exclusively on the needs of seniors in Central Indiana, and our Advisory Board takes seriously its responsibility to maximize the impact of our funding decisions.

Our strategic thinking over the past year has led us to conclude that we need to develop a community needs assessment tool that can help us mine the deep intelligence needed to inform our grant-making decisions. But we also believe a properly designed assessment tool can go even further. It can be used to help inform other funders about the "big picture" of an aging society and help persuade them to make informed, strategic grant decisions that can benefit seniors living in our community. Finally, with effective outreach and community discussions, it can also become an authoritative tool to help drive the public discussion concerning the needs of seniors.

We think we're on to something! And we're ready to commit some serious dollars to making it happen. We look forward to finding a strong, committed partner with whom to explore this frontier together.

 -- Ken

Snapshot of Aging in Central Indiana

The fact that 'the seniors are coming' is no longer news. They are the fastest growing demographic, especially those over 85. The 'boomer bulge' is fully upon us. Approximately 20,000 individuals turn 60 every year in Central Indiana. Central Indiana projections show those ages 60+ increasing 57% between 2015 and 2035, then 15% between 2035 and 2050. By 2035 it is estimated more than half a million individuals will be over the age of 60. The number of individuals over the age of 85 is projected to grow at an even faster pace and double in number between 2015 and 2050.

The challenge for the CISF Board is how to address needs in this fast-changing demographic. How to become better informed about the trends of aging in Central Indiana -- both to better serve and to become a resource to others working/giving in this space.

For example, we want to know about how long "seniors" will stay working and at what kinds of work. (We know that they comprise 30.4 % of the labor force, 2 percentage points higher than the US). When do they retire? What do they do for a fulfilling retiree life? How many are financially OK for a long life? How many are poor and fear whether they can make it? How many have substandard housing? How many are abused or poorly taken care of? The endless questions are not ones easily answered by averaging all seniors. The experiences of seniors are multi-faceted and unique challenges are faced by different racial, ethnic, and socio-economic groups. The challenges are also unique in rural, urban, and suburban neighborhoods.

The "State of Aging" report will become an on-going effort to not only articulate the changing local environment for older Central Indiana residents but also to communicate why these data are important and where the community needs to respond. The State of Aging report must also track national trends. For example, by 2034 Social Security is forecasted to be 'exhausted' and the Medicare Trust Fund by 2026 (2018 Social Security Trustees report). What could that mean for Central Indiana seniors? How well are seniors and pre-seniors in Central Indiana financially prepared today and tomorrow for changing retirement income? What are their opportunities to manage costs and supplement income?

Central Indiana Senior Fund

"The mission of Central Indiana Senior Fund is to support programs and opportunities for low-to-moderate income older adults in Central Indiana, with a focus on under-served or isolated populations."

Since its inception in 2005, CISF has awarded more than $7.6 million to senior-focused nonprofits and programs in Central Indiana. It not only provides responsive grant-making support, but also endeavors to be strategic and proactive in its funding by identifying and addressing the unique needs of, and opportunities for, the aging population.

CISF continues a passion to assure the elderly in Central Indiana have the basics of life and live the last chapters of their lives with a sense of dignity and worth. It has four main impact areas for giving:

1 Basic needs
2 Health & wellness
3 Living environment of choice
4 Life-affirming opportunities

In late 2017 CISF expanded its mission to be:
❑ a recognized voice on seniors matters in Central Indiana, striving to ready the community for the aging reality
❑ the 'go to' for information on seniors matters
❑ a widely-respected, knowledgeable convener on seniors matters
❑ an awareness-builder/attention-getter before funders and policymakers about critical areas of aging need, opportunity and change

More information about the CISF can be found at https://www.cicf.org/funds-and-foundations/special-focus-funds/central-indiana-senior-fund/.

CISF is a fund of Central Indiana Community Foundation (CICF), which recently completed a Strategic Plan update to be announced the first quarter of 2019. CICF's new mission is:

> *To mobilize people, ideas and investment to make this a community where every individual has equitable opportunity to reach their full potential—no matter their place, race or identity.*

CICF's focus is shifting to: *"empowering people, changing unfair systems, and dismantling institutional racism."* Whereas in the past over 50% of CICF's support went to place-making initiatives, like creating urban places that attracted and retained young professionals, the focus now will be more on neighborhoods in need/distressed neighborhoods. Such an initiative logically calls for much great attention to racism as an impediment to personal growth, equality and opportunity.

Proposals for the State of Aging Report should incorporate the spirit of CICF's new mission and provide data on people who are aging, their neighborhoods, and ways they can thrive under various circumstances. Also the State of Aging report should cover racial differences among the aged, offering facts in fighting racism in old age.

Definitions

Seniors: 'Seniors' or 'the elderly' are terms widely understood but vaguely defined. From its grant work CISF finds it useful to organize information about senior needs and aspirations using the following 3 categories: 'young-old' (55-64), 'middle-old' (65-84) and 'old-old' (85+). The report is to cover multiple characteristics of each of these groups: age distribution, ethnicity, race, employment/retirement, income, location etc.

This age break-out for seniors differs somewhat from mainstream literature. CISF has found those from 55-64 face unique work-life changes as employers decide if they can keep aging workers with higher health care costs on their payroll. Workers who have not kept up with new skills are particularly vulnerable to layoffs. Not surprisingly many find themselves out of work and low on savings. They often face a need that requires taking early social security at age 62 or to access other funds set aside for retirement. Approximately one-third of U.S. workers take social security at age 62, often setting in motion a lower income path through the retirement years. CISF wants to better understand their situation.

At the other end of the 'elderly age' spectrum is the old-old, almost universally agreed upon by geriatric professionals as those 85+. This segment of seniors is the fastest growing and has been widely researched, although CISF has many remaining questions.

In between is a growing number of 'middle-old' for whom retirement or near-retirement is a much-aspired adventure. Many of these individuals are living longer with greater

zest and an intent 'to continue to leave their mark' as a result of health and wellness improvements and better financial planning. We also know that significant numbers within this age group have been left behind, are poor, mistreated, and mostly forgotten.

Central Indiana: Central Indiana is defined for this report as Marion County and its 7 surrounding counties: Boone, Hamilton, Hancock, Hendricks, Johnson, Morgan and Shelby.

Vision: The State of Aging Report

General

CISF plans to establish an empirically-based community benchmarking and needs assessment tool that can serve several purposes:

INFORM: It should better inform CISF's decisions with respect to grant-making.

PERSUADE: It should independently provide value as a tool to other funders and provider stakeholders interested in the well-being of Central Indiana's seniors. It should also be used by policy makers and policy advocates to better understand the trends and needs of seniors.

LEVERAGE: It should help CISF leverage grant funding from other foundations and organizations for the initiatives and needs it identifies.

INNOVATION: It should help CISF be a more vocal and active player in fostering innovation in senior services and senior policy dialogue.

GROW: It should provide good visibility for CISF itself, helping it build fund assets for future endeavors and innovations.

The deliverables should be designed to help the CISF Board decide how, going forward, it is to address broadly the phenomenon of aging in Central Indiana. Key questions of interest to the Board are:

❑ What is the current "status" of aging in Central Indiana? Is it Age-Ready? Is it a good place to grow old?
❑ What are the emerging trends/issues related to seniors in Central Indiana?
❑ What are the needs of Central Indiana seniors, particularly vulnerable ones?
❑ How can 'purposeful living' or 'successful aging' become more real to more of our seniors?
❑ How can Central Indiana improve the lives of seniors and make the community age-ready?
❑ How can CISF have the most impact on the lives of seniors/vulnerable seniors?

Characteristics:

The report should be:

- ❑ **Comprehensive:** covering aging from multiple dimensions and perspectives.
- ❑ **Authoritative and Unbiased:** not bound to particular preconceived notions or favored solutions; drawing on a wide body of literature.
- ❑ **Data-Driven; Data-Refreshed:** utilizing data from whatever sources are available, recognizing data limitations and release dates, triangulating across sources to arriving at most plausible conclusions; updated at least annually.
- ❑ **Insightful and Engaging:** shedding new and different light on topics and documenting creative /innovative solutions.

What this report should not be! The focus of the report should not be a comparative of aging across metros similar to Central Indiana. It may have a few rankings when easily attained metro comparisons are available. It is intended as a first thorough look at what is happening within Central Indiana through the lens of aging and therefore the contractor's time should be spent almost exclusively on gathering, analyzing and reporting on local conditions. Comparative analyses with other regions may be part of later reporting cycles and contracts.

Research and Dissemination Partner Qualifications

General Requirements

Overall Project Management/Principal Investigator: In effect the partner will serve as CISF's primary 'research arm' over the three years of the contract.

Key Strengths: The Principal Investigator must satisfy the CISF Board it has expertise in the following areas:

- ❑ **Social and Economic Data Familiarity, Metric Design and Data Management Software.**
- ❑ **Data Storage and Future On-Demand Access**.
- ❑ **Data Analysis** especially in relation to socioeconomic topics.
- ❑ **Communications and Distribution**, demonstrating experience and skill in packaging complex information in easily understood language and visuals creating awareness, dialogue and action among interested parties.
- ❑ **Field Validation** using select mini–surveys, interviews, focus groups, community forums etc. to seek validation of data findings and to prepare vignettes/stories to illustrate data findings.

Local Knowledge

An applicant must demonstrate familiarity with the Central Indiana area.

Expertise in Aging Issues

CISF has a strong preference for a research partner with a demonstrated history and expertise with issues of aging and services to seniors and/or data collection and analysis.

Creative Communication / Dissemination Skills

While this research demands strong data assembly and analytical skills, its ultimate impact will depend on how well the data and findings are prepared for a variety of audiences. We need a partner with creative communication skills that result in very readable documents – reports, summaries, select brochures etc. The applicant must also exercise creativity in how we communicate the findings using various forms of media, including illustrative stories.

CISF has explored a number of examples of communication styles applicable for a report like the one we envision. We are looking for a contractor with the skills to assess the pros and cons of style of such related products, coming up with attention-grabbing styles for Report. Below are examples of reports CISF reviewed:

https://torontofoundation.ca/vitalsigns/

https://www.stlouisco.com/Portals/8/docs/document%20library/AgeFriendly/FINAL_Aging_Successfully_Assessment.pdf

http://successfulaging.milkeninstitute.org/2017/BCSA-2017.pdf

We also expect a contractor with expertise for setting up electronic access to lots of support data not necessarily included in the final report. The way Indiana United Ways has dealt with that deserves consideration:

http://www.indianaimpact.org/MarionCounty

Long-Term Partner

The applicant should demonstrate its ability and the desire to work closely with the CISF Board over at least three years.

Collaborative Approach

The applicant should have experience in collaborative research and program development as the contractor is expected to be an active participant in co-creating the overall direction of the State of Aging project. The negotiated scope

of work will include a willingness on both sides to adjust the work plan as new information/insights come to light over the course of the contract.

Primary Tasks

YEAR 1 – 2019 (Internal Focus)

- ❑ Initial Full (2019) Report preparation primarily for internal CISF use = **First Edition**
    - o Progess report and preliminary data in June 2019 for use in 2019 grant–making followed by final release in September 2019
- ❑ CICF awareness, input and possible application
- ❑ 2-3 private meetings/discussions with key stakeholders
- ❑ Recommended actions for more efficient and sustainable data collection, analysis and reporting in future years

YEAR 2 – 2020 (Beta Year: Limited Release)

- ❑ Repeat 2019 report with data updates as appropriate -- for internal CISF use = **revised First Edition**
- ❑ Increased CICF awareness, input and application
- ❑ Preparation of 1-2 trial 'short versions' for wider distribution
- ❑ Sharing findings with select other senior boards -- wider Distribution/discussion with 4-5 senior-serving organizations
- ❑ Refining software for future report automation

YEAR 3 – 2021 (Community-Wide Distribution)

- ❑ Fresh full report = **Second Edition.**
- ❑ Preparation of 'short version' reports designed for select media outlets
- ❑ Full CICF awareness and application where appropriate
- ❑ Full community-wide distribution and dialogue, including senior-serving organizations
- ❑ Refining automated systems

YEAR 4 – 2022 (Embedded Community-Wide Presence)

Possible repeat of Years 1-3 based on CISF Board assessment of success of the first three years.

Deliverables Timeline

Year 1 - Progress Report, June 1, 2019. The intent is that early data and findings might be used to inform grant-making in Summer/Fall 2019.

Year 1 - Final Report, Sept 1, 2019

Year 2 - Final Report, Sept 1, 2020

Year 3 - Final Report, Sept 1, 2021

Data and Methodology

This initiative assumes the exclusive use of secondary data sources. No primary data collection is required. However, 'field check' interviews and focus groups may be required to validate interpretations made from regional, state or national sources. Examples/stories collected from 'field checks' should serve to give data /analyses relevance and local meaning.

Guiding data development principles (See Appendix A for more information):

1. Some data, even where limited, is better than no data.
2. Given that in many cases data is incomplete, multiple sources and types of data must be applied to corroborate findings.
3. **In many cases the most complete and accurate data has been aggregated at the state or national level. Local interpretations of such data requires a heuristic approach using very localized studies, surveys, anecdotal evidence, interviews and 'field check' focus groups.**

Timeliness of Data and Time Series: Data is to be prepared as both a snapshot of the most recent data available in 2019 and, where possible, as 5-year trend intervals.

Ownership of databases, reports etc.: CISF's expectation is that deliverables of this project will include not only any written reports but also access to the underlying data. Database ownership and maintenance issues should be addressed in the consultant's proposal.

Report Contents

CISF has undertaken six months of exploratory examination to determine the content it would like included in the first State of Aging Report. The content outline below should not set boundaries but serve as guide for proposers. CISF is open to other topics, data sources and fresh approaches which a proposer sees fit to include.

1. 'Big Picture' Trends – Looking Back/Looking Forward

The Board wants the State of Aging Report to be an authoritative reference for community leaders, decision-makers, senior-serving organizations and philanthropic organizations serving Central Indiana. Each successive biennial report will update these trends and likely modify the headers over time as circumstances change. Basically the key headers below were arrived at by considering the following question: "over the next 20 years what must we be tracking?" This section of the report is looking for major uptrends and downtrends as well as disruptions in Central Indiana trends with comparisons to state and national trends.

- ❑ Demographics including Morbidity and Mortality Trends.
- ❑ Notable Changes in Health and Wellness, Positive and Negative, including drug abuse/opioids.
- ❑ Seniors Financial Stability/Retirement Income Trends.
- ❑ Senior Housing Trends.

2. Central Indiana Basic Needs Assessment

A detailed listing of data and tentative metrics is included as Appendix A. Our selection of data has been influenced by its availability, timeliness, and geographic specificity. Proposers may include other sources. Key headers:

- ❑ Food and Nutrition
- ❑ Shelter
- ❑ A place called 'Home'/ Sense of Place/Neighborhood
- ❑ Safety/Security
- ❑ Health and Health Care
- ❑ Transportation
- ❑ Social Inclusion and Friendships (opposite = Loneliness)
- ❑ Purposeful Living

A Note on Purposeful Living

Many aging studies separate the 'basic needs' assessment from the 'purposeful living' assessment. CISF considers purposeful living an essential ingredient of basic needs, especially as people age. Sub-categories that may be included are listed in Appendix B.

3. Status of Forefront Issues Facing the Elderly

Issues facing the elderly are changing. We want the Report to keeps us up-to-date on progress in addressing these issues. This Report is not intended to be a policy analysis or solution-finder. Rather the purpose of this section of the Report is to assess "how well

are we doing?" on critical issues that have become forefront. The proposer should draw on available data and recent reports /plans/studies but may also need to conduct select interviews, focus groups etc. in Central Indiana to draw conclusions about the status of affairs under, but not limited to, the following issues:

- ❑ Living in Place (including how the elderly are keeping up with residential repairs/maintenance, identifying those counties doing well)
- ❑ Home-based Care vs. Community–based Care
- ❑ Safety/Security (including neighborhood safety/security)
- ❑ Physical Abuse
- ❑ Financial Abuse (including being taken advantage of by family)
- ❑ Care Giving of Loved Ones
- ❑ Parenting as Grandparents

Proposal Guidelines and Budget

In preparing a bid, proposers should refer to the above section **'Research and Dissemination Partner Qualifications'**

The proposal should be submitted in electronic form to juliek@cicf.org.

The budget should be prepared <u>by year</u> for 2019 thru 2021. We assume the budget for year one will be higher than later years given the costs of database building, software development, initial field verifications etc. CISF reserves the right to reject all proposals and re-release the request for proposal.

Proposal general guidelines:

- Proposal should be submitted as one complete electronic file including bios, prior experience, work plan and budget. Hyperlinks to supporting materials may be included in the proposal.
- Text 12 font or larger, 1" margins
- There is no proposal page limit but brevity is a virtue.
- CISF wants to encourage creative and thoughtful proposals and therefore has not set an anticipated cost range. Proposals will not be rejected solely based on costs.

The proposal should include:

- Detailed work plan
- Detailed budget spreadsheet <u>by year</u> for 2019-2021. Narrative budget justification must be included but does not have to be encompassed in the spreadsheet.
- No more than two-page bio-sketches of each principal/key personnel
- No more than two-page total description of any related projects/prior work

- No more than two-page total details of roles of internal staff and subcontractors
- Descriptions of subcontractors' expertise: no more than two-page total (If subcontractors have yet to be selected, proposal may include desired qualifications.)
- The proposal should include a statement on how indirect costs/overhead are addressed in the budget, e.g., as a separate line item or spread across all expenses. Indirect costs should not exceed 20% of total direct costs.

RFP Timeline

Nov. 1, 2018: Release of RFP

By Nov. 14, 2018: All questions should be submitted by email to juliek@cicf.org.

By Nov. 14, 2018: Bidders are encouraged to notify Julie Koegel of their interest in applying by email at juliek@cicf.org. Organizations that do not submit notification of their interest may still submit a proposal. However, they will not receive the written response to questions (see below).

Nov. 20, 2018: CISF written responses to all submitted questions will be distributed to all organizations who notified Julie Koegel via email of their interest in applying.

Dec. 21, 2018 5 P.M. EST: Proposals due

Jan. 28 - Feb. 1, 2019: Interviews with selected candidates

Feb. 15, 2019: Award made; work to begin as soon as contract is finalized

Contact Information

This request for proposals has been prepared by the CISF Board with research and facilitation assistance from GrowthEconomics of Indiana and Florida and CICF staff.

All correspondence and communications should be addressed to:

Julie Koegel
CISF Grants Officer
Juliek@cicf.org
(317) 293-7006

APPENDIX A: DATA CONTENT AND EXPECTATIONS

The following appendix is based on research conducted by GrowthEconomics and conversations with the CISF Advisory Board concerning desired content and key areas of concern.

It is anticipated that this data list will be the starting point for discussions between the contractor and CISF about the scope of the collection, analysis, reporting and archiving of data related to the State of Aging Report.

Potential contractors should be aware that the data sources and individual items listed are not available in a uniform matter. CISF understands that the data will vary in geographic specificity and in age, racial, ethnic, and socio-economic breakouts. The primary decision about whether to include data should inform the community about the lives of seniors in central Indiana. Uniformity and fit to a specific database structure should not be a prerequisite for inclusion in the data collection process. CISF is particularly interested to know what data gaps exist, what data collection is under construction, and where, if any, supplemental data collection by CISF and its partners is desirable going forward.

Data should be collected at the smallest geographic unit available from the data source. The decision to geo-code data to a smaller geographic area than is available from the source should be decided based on the cost of geo-coding versus the value of additional knowledge of the geographic nature of the issue. CISF expects the vast majority of the data should be presented, at a minimum, at a county level.

CISF welcomes the insights and ideas of prospective contractors on additional data or lines of inquiry that should be included in the initial scope of work. Any concerns about specific data sources or methodologies included in this appendix should be noted in the response to this RFP.

Type of Data	Source	Data Specifics	Website location	Notes
Key Sources	**CICOA 2017 Community Assessment for Older Adults**	Survey	https://cicoa.org/community/research/casoa-survey/2017-casoa-survey/	2013 and 2017; Need to determine the validity of small population samples for sub-groups. 488 surveys in 2017; likely best source for "purposeful living"
	Connect2Help	Age-specific needs of a caller to 211 for assistance on whole range of issues including basic needs, health, utilities.	http://www.connect2help211.org/	On-going tracking of calls to 211; CRITICAL REAL-TIME DATA
	SAVI (Social Assets and Vulnerability Indicators)		Http://www.savi.org	Limited public data by age but could be vital in looking at environmental factors. Explore how much of the raw data collected can be extracted by age groups.
	American Community Survey		https://factfinder.census.gov/faces/nav/jsf/pages/index.xhtml	The annual release of 5-year average on basic demographics. Note: due to five-year averaging emerging trends more difficult to see emerging trends.
	Census Bureau: Older Americans Month		https://census.gov/newsroom/stories/2018/older-americans.html	
Demographics	**American Community Survey**	Age, Ethnicity, Income, Housing Status, Gender, Household membership, and structure, etc.	https://factfinder.census.gov/faces/nav/jsf/pages/index.xhtml	Some of the general demographic information may also be located in SAVI and other online data interfaces
Income	**American Community Survey**	In addition to general income stats, will need to calculate dependency on social security	https://factfinder.census.gov/faces/nav/jsf/pages/index.xhtml	The annual release of 5-year average on basic demographics. Note: due to five-year averaging emerging trends tend to lag the data.

Type of Data	Source	Data Specifics	Website location	Notes
	Bureau of Labor Statistics		https://www.bls.gov/careeroutlook/2017/article/older-workers.htm https://www.bls.gov/data/	According to the U.S. Bureau of Labor Statistics (BLS), about 40 percent of people ages 55 and older were working or actively looking for work in 2014. That number, known as a labor force participation rate, is expected to increase fastest for the oldest segments of the population—most notably, people ages 65 to 74 and 75 and older—through 2024. In contrast, participation rates for most other age groups in the labor force aren't projected to change much over the 2014–24 decade.
	Elder Index	Another way to look at income instability by factoring in home ownership and mortgage payments	http://www.basiceconomicsecurity.org/EI/location.aspx	Would have to be developed at a local level based on American Community Survey data
Basic Needs: Food and Nutrition	CICOA 2017 Community Assessment for Older Adults	The survey included issues of food and nutrition	https://cicoa.org/community/research/casoa-survey/2017-casoa-survey/	2013 and 2017; Need to determine the validity of small population samples for sub-groups. 488 surveys in 2017; likely best source for "purposeful living"
	Connect2Help	Age-specific needs of a caller to 211 for assistance on whole range of basic needs	http://www.connect2help211.org/	On-going tracking of calls to 211;
Shelter	American Community Survey	Detailed Information on Housing Status Etc.	-	
	Connect2Help	Housing Assistance Requests	-	See details above..zipcode level data

Type of Data	Source	Data Specifics	Website location	Notes
Neighborhood Condition/Sense of Place	SAVI: Indy Vitals	Ranking of Neighborhoods: % of seniors living in high ranked/low ranked neighborhoods	https://indyvitals.org/Index	IndyVitals measures the health and sustainability of neighborhoods in Marion County, Indiana in the following goal areas: Built Environment, Economy & Jobs, Education, Arts & Community, Equity & Empowerment, Health & Safety, Natural Systems, General Demographics Is this a proxy for neighborhood environment?
	CICOA 2017 Community Assessment for Older Adults	Ratings of Neighborhood and Services	-	
Safety/Security	Indiana FSSA: Adult Protective Services	Reported Senior Abuse	https://iga.in.gov/legislative/2017/publications/agency/reports/fssa/#document-fc0b8edc	
	Ind Atty General Fraud		https://www.in.gov/attorneygeneral/2389.htm	Need to find aggregated source data.
	Courts.in.Gov		http://www.in.gov/judiciary/iocs/3425.htm https://www.in.gov/judiciary/iocs/files/ad-guard-registry-factsheet.pdf	Guardian Registry in place but the interface is geared toward individual analysis and not aggregated

Type of Data	Source	Data Specifics	Website location	Notes
	Local Crime Reports	Seniors as victims of crime	-	Gathering crime data has always been a complicated process due to the number of jurisdiction and lack of consistent reporting. Uniform Crime Reports do not appear to include the age of victims.
	BJS Crimes Against the Elderly, 2003-2013	National Trends	https://www.bjs.gov/index.cfm?ty=pbdetail&iid=5136	
	National Crime Victimization Survey (NCVS)	Survey	https://www.bjs.gov/index.cfm?ty=dcdetail&iid=245	The National Crime Victimization Survey (NCVS) is an annual data collection conducted by the U.S. Census Bureau for the Bureau of Justice Statistics (BJS). Each year, data are obtained from a nationally representative sample of about 134,690 households and 224,520 persons, on the frequency, characteristics, and consequences of criminal victimization in the United States.
	Indiana FSSA: Long-Term Care Ombudsman Report	Complaints about care	https://iga.in.gov/legislative/2017/publications/agency/reports/fssa/#document-6a49f9fb	The State Long-Term Care Ombudsman Program is resident-focused only. The program investigates and attempts to resolve complaints and concerns that are made by or on behalf of a resident residing in a state licensed or certified facility and that involve the health, safety, welfare, or rights of a resident.
Health and Healthcare	Indiana School of Medicine	Urban Access to Healthcare	https://www.indianactsi.org/engagement-quality-life-represented-older-adults/	2017 Study: To identify the elements of participation in the SCP by urban,
	Indiana State Department of Health: Mortality	Mortality	http://www.in.gov/isdh/reports/mortality/2016/table09/tbl09_49.htm	Age Breakouts: 55-64, 65-74, 75-84. 85+

Type of Data	Source	Data Specifics	Website location	Notes
	Indiana State Department of Health: Long Term Care abuse	Long-Term Abuse	http://www.in.gov/isdh/23638.htm	Reporting System for suspected elder abuse in long-term care
	Indiana State Department of Health: Epidemiology	Communicable Diseases	http://www.in.gov/isdh/25154.htm	Flu, etc. (NBS system upgrade in 2019)
	Opioid Deaths	Drug-Related Deaths	http://www.in.gov/isdh/27393.htm	
	Alzheimer's Association	Morbidity and Mortality	https://alz.org/media/HomeOffice/Facts%20and%20Figures/facts-and-figures.pdf	Also caregiving costs; not at county level
	Healthy Aging CDC	Caregiving, Cognitive Decline, General Health, Smoking, Nutrition, Physical Activity, Obesity, Screenings and Vaccines	https://nccd.cdc.gov/aging_data/rdPage.aspx?rdReport=DPH_HAP.ExploreByLocation&rdRequestForwarding=Form	
	Healthcare Resources		http://successfulaging.milkeninstitute.org/bcsa-map.html	Milken using 18 indicators for Health Care which ranks Indpls MSA as 9th of the large MSA's. Need to discuss which are the most important not to overwhelm the number of indicators:
	LISC Neighborhood Health Initiative/IUPUI Fairbanks School of Public Health	Life-Expectancy by Neighborhood	http://www.savi.org/savi/documents/Worlds_Apart_Gaps_in_Life_Expectancy.pdf	There is a 10 - 20-year life expectancy gap between various Indianapolis neighborhoods. The lower life expectancy rate is largely due to health disparities and is similar to rates seen in countries such as Iraq and Bangladesh. In addition, 80 percent of health outcomes come from social determinants of health like housing, safety, and income

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Type of Data	Source	Data Specifics	Website location	Notes
Transportation	Section 5310 spending		-	This program (49 U.S.C. 5310) provides formula funding to states for the purpose of assisting private nonprofit groups in meeting the transportation needs of older adults and people with disabilities when the transportation service provided is unavailable, insufficient, or inappropriate to meet these needs
	CICOA 2017 Community Assessment for Older Adults	Specific questions on transportation	-	
	SAVI: Bus Ridership		http://www.savi.org/report/who-rides-the-bus-examining-transit-ridership-in-marion-county/	Bus ridership by age 2017
Social Inclusion and Friendships	CICOA and Other Surveys			Need to determine whether to include measures of current status (e.g., seniors reporting active social life) or opportunities for social interaction (e.g., informal and formal senior programs related to social isolation).
Purposeful Living	See Appendix B		-	
Volunteering	Corporation for National and Community Service	Median Hours and Rate of Participation	https://data.nationalservice.gov/Volunteering-and-Civic-Engagement/Indianapolis-IN/jw9u-v9qe	

Appendix B: Content and Data -- Purposeful Living

As stated under 'Report Contents', CISF considers a purposeful living a 'basic need'. In other words, even more so with aging, finding meaningfulness in life has been shown to be foundational for wellbeing and longevity. CISF recognizes that scholarly explorations of such matters are not as well advanced as for the other areas of 'basic needs'. Further, relevant secondary data is limited especially at the subnational level. Nevertheless, as a vital part of this Report, CISF wants good coverage of this topic. To that end, it has identified the 12 sub-categories below that reasonably embrace the broad topic of purposeful living. Since it is not the intent to collect primary data for the Report, the Board is interested in hearing from applicants as to how they propose to 'get a handle' on the topic.

A closely related concept appearing in the literature since the 1950's has been that of 'successful aging'. Prior to the 50's, research had focused on the downsides of aging and preventing the decline of youth. But the research on successful aging found an increasing number of adults both living longer and functioning at high levels of wellbeing while making ongoing contributions to society. However, some have considered the term 'successful aging' as implying a failure by those who did not meet arbitrary criteria. CISF's preference is to use the term 'purposeful living'.

To set the stage for this part of the Report the CISF Board has identified twelve subcategories of purposeful living that deserve measurement in the Report. These are briefly introduced below:

1. Participation in Groups/Organizations and Leadership Responsibilities (Community Engagement)

A fundamental from Social Psychology 101 is that 'humans are social beings.' We want to know how active aging residents are in local groups, clubs, etc. including assuming leadership roles and responsibilities.

2. Care Giving (as a Social Issue)

While the burdens of caregiving may increase with the old age, caregiving can be a way to bring like-minded people together. Networks of caregivers can form, with rosters of volunteers assembled to relive the stress of primary caregivers. We want to know how much caregiving has become part of the social fabric of aging neighborhoods.

3. Hospitality/ Culinary Fun

In his early work on 'Blue Zones,' Dan Buettner found cooking an active expression in long-living communities -- not only as an endeavor of personal satisfaction but as a means of social engagement. He notes from the Ikaria, Greece case

study: "It struck me as I watched her cook that I was witnessing one of the world's great workshops of longevity" (National Geographic Special 2016) While meals on wheels has become a godsend for those choosing to live independently, being kitchen–active can be part of   purposeful living, especially when coupled with 'having neighbors over for supper'.

4. Volunteering

Longer retirements are giving rise to higher levels of volunteerism by seniors. Encore.org is a nation-wide organization helping those over 50 find self–expression, self-worth with a societal contribution through second careers, and various roles and contributions to non-profits/ charitable organizations. Encore.org asserts: **"Today there are more people in the U.S. over 50 than there are under 18. By 2035, 140 million Americans, more than 1 in 3, will be over 50. With decades of productivity ahead, adults 50+ are a growing and renewable resource we can't afford to waste."**

5. Employment

Senior labor force participation rates are on the rise -- the U.S Bureau of Labor Statistics has found an almost doubling in past two decades. Of the 100 cities with the largest senior populations in America, a SmartAsset recent study found the senior LFPR in 2016 to be over 20% in Austin, Dallas, Denver, Minneapolis, Nashville, Seattle, Raleigh, and Tulsa. In the Indianapolis Metropolitan Area, the Labor Force Participation Rate in 2017 for persons 65 years and older was 17.9% according to the U.S. Census Bureau.

Additionally, more Americans over 85 years old are working. The U.S. Dept. of Labor has found 4.4 percent of Americans of that age group working in 2017, up from 2.6 percent in 2006, before the recession, the highest number on record.

Many reasons abound, some simply need the money to survive but according to an Employee Benefit Research Institute study, over half of the seniors surveyed continued to work past 65 because they wanted to stay active and involved. Socialization, 'making a difference', intellectual stimulation and challenge, and feeling of self-worth are motivators to continue to work. A key metric readily available is Senior Labor Force Participation Rate -- the percent for residents aged 65 years and over in the labor force comes from the Census Bureau's 2016 American Community Survey

6. Entrepreneurial and Business Initiatives

Of those choosing a 'second career', how many and at what rate are they setting up independent small business? Or maybe partnering with other retirees in a new joint venture, for-profit or non-profit? Some communities are establishing initiatives to promote and assist "encore entrepreneurs."

7. The Arts and Artistic Expression (incl. hobbies, music performance, and appreciation)
The arts have long been a means of enjoyment and self-expression by the elderly. Neighborhood art classes and theatre outings can be useful ways to track this attribute.

8. Learning and Teaching

Enrolments by the elderly in formal education are on the rise, both credit, and non-credit courses. Further, one 'second career' path in retirement is to give back a wealth of knowledge and skill learned from a successful career by becoming teacher/coach to those just starting off.

9. Walking /Movement/Exercise

Physical activity is both a universally recommended and usual attribute of an good elderly lifestyle. The degree to which collective physical activities, such as regular dance/yoga/fitness classes, are patronized in a neighborhood can be an additional way to measure this attribute.

10.   Gardening (individual and group/neighborhood)

Like cooking, gardening can bring great enjoyment to seniors –participation in individual gardens yes but community gardens even more so. Also, activity in gardening clubs is worth monitoring.

11.   Faith Journey and Religious Activities.

Dan Buettner in his work in 'blue zones', communities around the world with high concentrations of longevity and successful aging, reported in National Geographic: "Research has shown that attending faith-based services four times a month adds 4 to 14 years of life expectancy. The choice of denomination doesn't seem to matter".

12. Charitable Giving/Philanthropy

The giving of time, talent, and treasure to some cause outside oneself is invariably a way to express a deeper purpose in life.

Purposeful Living Potential Data Sources

Data	Opportunity	Participation
Participation in Groups/Organizations and Leadership Responsibilities (Community Engagement)	CICOA: Opportunities to participate in gov't and community meetings.	CICOA Survey: Number of Hours Participating in Civic Groups & Clubs
Care Giving (as a social issue)		CICOA: Detailed information on caregiving; including children under 18
Hospitality/Culinary Fun		TBD???
Volunteering	CICOA Survey: Rating Volunteer Opportunities	CICOA Survey: Number of Hours per week volunteering Corporation for National Service: MSA Participation Rate by Age 2015
Employment (increase opportunities to work into 70's /80's)	CICOA Survey: Rating Employment Opportunities	Bureau of Labor Stats CICOA Survey
Entrepreneurial and Business Initiatives		US Small Business Administration SBDC client data
The Arts and Artistic Expression (incl. hobbies, music – performance and appreciation)	CICOA: included under recreational activities	
Learning and Teaching	CICOA: Opportunities to enroll in skill building	
Walking/Movement/Exercise	CICOA: Opportunities for fitness	CICOA: Exercise (Never-Always)
Gardening (individual and group/neighborhood)		Keep Indianapolis Beautiful volunteer database.
Faith Journey and Religious Activities	CICOA: Opportunities for religious activities	CICOA: Participating in religious or spiritual activities
Charitable Giving/Philanthropy	GIVING USA: Rankings of metro areas by giving to senior-serving agencies	