

THE UPTOWN ELDERS
EDUCATIONAL PROGRAM

The Chicago neighborhood with the greatest number of people age 60 and over is Uptown, with 30,802 Senior Citizens. To supplement the many fine city and private agency programs dealing with nutrition, housing, employment and transportation, there is a definite need for an educational program to expand the cultural and social awareness of the elders.

SUBMITTED TO:

Dr. Arthur Flemming, Commissioner on Aging
U.S. Dept. of Health, Education and Welfare
Mary E. Switzer Building
330 C Street SW
Washington, D.C. 20201

BY:

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RATIONALE

THE SENIOR CITIZEN AS THE ELDER

Society is becoming aware of the enriching power of elders as their unique role is examined and explored. Their wisdom and skills, and especially their ability to care for others, have been untapped for several generations. The senior citizen can become a respected community elder by tapping and expanding the wisdom and life meaning gained through years of life reflection.

THE QUESTION OF ENGAGEMENT

Many senior citizens are striving for concrete engagement in the midst of their local community. As elders, they have a crucial contribution to make to the development of any local community. Yet they are hindered by a societal image that interprets their role as that of retiring engagement. Recovery of the elders' role as the wise ones, as those who embody the wisdom of a heritage, as those who care about the meaning of life, holds the promise and gift of the contemporary elder.

THE ROLE OF EDUCATION

In many communities there are significant pilot projects that make the services of the community more available and relevant to the senior citizens. A deeper issue of the elders' involvement in the community is now at stake. Serious education for the elder, if it interprets the best of the 20th Century wisdom, permits him to be more aware of the times, his community and consequently to become more involved. A significant educational program for elders needs to be created.

EDUCATION FOR UPTOWN ELDERS

The Institute of Cultural Affairs, under the auspices of the Ecumenical Institute, is uniquely suited to create and implement an educational and involvement construct for the elders in Uptown. In addition to having developed and taught two-day "mini" courses to over 200,000 people, the ICA has concrete experience with elders in the successful Fifth City project on the West Side of Chicago. In addition to the course curriculum, elders of various ethnic groups in Uptown would be encouraged to build and teach a heritage course to the young. As an in-kind contribution, the ICA will purchase a substantial building in the center of the community for use as the Uptown Elders Educational Node.

STATISTICAL PROFILE

The elders aged 60 and over experience great roadblocks to meaningful engagement in their community. The average educational level of elders in this nation is grade 8.7. Retraining is geared to the younger, such as in the federal government retraining program in which only 10% are 45 or older. 19 of 40 sheltered workshops in Illinois had no persons 65 or over. Out of 27 colleges in Chicago, only one had a program geared to the elderly. The elders experience problems in participation with transportation, provisions for comfort, and relevance of material. Watching TV takes up more time than any other activity.

PROFILE OF ELDERS	
SITUATIONS	NUMBERS
Total Elders	30,802 over 60
Hospitalized	1,631 over 65
In Nursing Care	987 over 65
In Nursing Homes	126 over 65
In Residential Homes for Aged	315 over 65
Living Alone or With Spouse	20,230
In Family Care	7,513
Not Incapacitated	9,240
Employed (mostly part time or low pay)	4,620
In Junior College Programs	8
In Vocational Programs	51

OBJECTIVES

The main goal of the Uptown Elders Educational Program is to enable elders to recover a sense of meaning and vision in the face of a rapidly changing world and to allow them to see their own unique ability to contribute positively to that world.

I. To establish an Elders Educational Node which will serve as a training and community center for the elders of the Uptown community.

II. To develop and implement an educational training program for elders which will:


- a. Train 1,440 elders in the two-day mini courses.
- b. Train 225 elders in a four-week cultural and social curriculum.
- c. Train 100 individuals 55 and older in a two-day pre-retirement training program.

III. To establish a Board of Elders made up of graduates of the Uptown Elders Educational Program which will:

- a. Act as a coordinating body in the Uptown community in order to represent the concerns of the elders.
- b. Establish an elders' talent pool, a consultant advisory group, an elders faculty group, an information and social services center, and a community celebration guild in order to make available information and engagement opportunities for elders.
- c. Coordinate continuing education programs for elders at local universities and colleges.

CURRICULUM

The curriculum outlined will be the basis for the two-day courses and the Academy. The two-day courses will be taken by 1,440 elder participants and 100 pre-retirement individuals. There will be 225 elders taking the complete curriculum in the four-week Academy. Hours will be from 10:00 a.m. to 3:00 p.m. with a hot lunch served. On Wednesday the week will be punctuated with a community activity of educational and cultural interest.

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
WEEK I	THE CULTURAL SITUATION		COMMUNITY ACTIVITY	LIVING EFFECTIVELY IN THE NEW SOCIETY	
WEEK II	THE INDIVIDUAL AND THE FAMILY		COMMUNITY ACTIVITY	PSYCHOLOGY AND ART	
WEEK III	THE COMMUNITY AND THE POLIS		COMMUNITY ACTIVITY	SOCIOLOGY AND HISTORY	
WEEK IV	THE NATION AND THE WORLD		COMMUNITY ACTIVITY	SCIENCE AND PHILOSOPHY	

PROGRAM PLAN

SET-UP PHASE

The Uptown Elders Educational Program will be divided into four phases spanning the twelve month period from January 1 to December 31, 1974. During the set-up phase permanent staff and faculty will be hired and will participate in the completion of the research back-up and planning. An initial task force of leading elders from the Uptown community will be formed to serve as an on-going advisory group who will participate in the planning, recruiting, implementation, and evaluation of the program. The Elders Educational Node will be equipped, and there will be an Open House to introduce the program to the community. Publicity will be distributed and recruitment will take place in the Uptown area.

TRAINING PHASE

The training phase will include the two-day mini-courses, the four-week intensive training courses, and the pre-retirement course for individuals beginning to plan for their retirement years. The curriculum will be developed and adapted from the curriculum of the Institute of Cultural Affairs which has been taught nationally and internationally during the past twenty years as an educational catalyst for social and cultural awareness. The curriculum will be adapted further for the Uptown Elders Educational Program by the task force of elders and the faculty. Prior to the finalization of curriculum objectives, a needs assessment tool will be used to discern the contradictions and blocks that the elder is facing today. Course implementation will take place over a nine month period during the last three quarters of the year. Evaluation will be an ongoing responsibility of the faculty and participants in order to refine the courses.

FOLLOW-UP PHASE

The follow-up phase will take place during the last six months of the program year. A Board of Elders, made up of graduates of the educational programs and task force members, will be formed to develop significant engagement possibilities for elders of Uptown. Graduates of the courses will already have been trained and motivated to participate creatively in the development of care structures for the Uptown community. Such structures will include an

elders' talent pool, a consultant advisory group, an Uptown elders' faculty who could themselves begin to teach courses in the community, an information and social services center, a community celebration guild, and a continuing education program affiliated with the University of Illinois at Chicago Circle and the YMCA Community College.

EVALUATION
PHASE

The evaluation phase will be carried out by the staff of the program and the Board of Elders. The success of the program will be measured using evaluation tools to assess the accomplishment of the measureable objectives as stated in the proposal for funding and subject to the final grant requirements. Evaluation results will be used in the design and finalizing of a reduplicable model of the Uptown Elders Educational Program.

TIMELINE

PHASES	J	F	M	A	M	J	J	A	S	O	N	D
<u>SET-UP</u>												
Research and Planning			▲									
Staff Hiring	▲											
Task Force	▲											
Elders Educational Node			▲									
Publicity			▲									
Recruitment			▲									
<u>TRAINING</u>												
Needs Assessment		▲										
Development of Objectives		▲										
Curriculum Adaptation			▲									
Course Implementation												▲
Ongoing Evaluation												▲
<u>FOLLOW-UP</u>												
Follow-up Visits												▲
Board of Elders												▲
Elders' Talent Pool												▲
Consultant Advisory Group												▲
Elders' Faculty Group												▲
Information & Social Services Center												▲
Community Celebration Guild												▲
Continuing Education Program												▲
<u>EVALUATION</u>												
Evaluation According to Program Objectives												▲
Reduplicable Model												▲

BUDGET

		ANNUAL SALARY RATE	NO. MONTHS BUDGETED	% TIME	AMOUNT
PERSONAL SERVICES	1. Executive Director	15500	12	100	15500
	2. Associate Director	13000	12	100	13000
	3. Faculty (6 Trainers/Educators)	11000	12	100	66000
	4. Community Activity Coordinator	8400	12	100	8400
	5. Secretary	8400	12	100	8400
	6. Janitor	6600	9	100	4950
	7. Cook/Dishwasher	7000	9	100	5250

		ICA IN-KIND	AMOUNT
PROGRAM COORDINATION	1. Facility (Elders Educational Node)	70,000	
	2. Office Equipment & Supplies		
	Desks - 10 @ \$350. each		3500
	1 Typewriter		500
	2 Telephones		900
	Misc. & Correspondence		1000
	3. Program Equipment & Materials		
	Tables - 28 @ \$50.		1400
	Chairs - 75 @ \$35.		2625
	Blackboards - 3 @ \$75.		225
	Decor		470
	Publicity & Printed Materials		1000
	Xeroxing		1000
Maintenance		500	
Course Materials		3000	
Community Activity Expenses		5000	
Lunches - 1440 Trainees X 2 Days		2880	
225 Trainees X 20 Days		4500	

TOTAL			150,000
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THE UPTOWN ELDERS EDUCATION PROGRAM
Quarter I & II Results/Quarter III & IV Projections

ENCOURAGING
INITIAL
RESULTS

In a society where the role of the elder is one of ambiguity and insecurity, the initial results of the Uptown Elders Education Program have proven so encouraging that careful consideration has been given to accelerating the program during the final six-month period. It has been determined that the pilot program ratio of success has been beyond the original expectations. In order to meet the demand for increased numbers of senior citizens desiring leadership training, an increase of \$75,000 is being requested.

EDUCATIONAL
NODE
ESTABLISHED

I. During the first three months of the program, the Elders Educational Node has been established and staffed. Throughout the community, elders have been contacted and made aware of the existence of the facility. Planning and recruitment for the celebrative opening of the node resulted in some 1,000 community residents (of all ages) participating in the festivities. Approximately 60% of those in attendance were senior citizens and the presence of the remaining 40% gave broad-based credibility and support for such a program. It became obvious that in order for the elders to actively engage in the training facilities, full authorization support must come not just from the senior citizen constituency, but from the entire community. Such authorization has been given and it is anticipated that this support will pave the way for intensifying the program between now and March, 1975.

EDUCATIONAL
PROGRAM
IMPLEMENTED

II. The implementation phase of the Elders Educational Program has produced the following results:

a. In terms of the stated objective to train 1,440 elders through two-day mini courses, at the conclusion of the first three months, 155 such elders have been trained. Projections for the next three months indicate that an additional 1,190 elders will have been trained by the end of September. Among those elders who have completed the mini-courses, a pattern of leadership has emerged which is expected not only to continue but to be amplified in the coming months.

b. The four-week cultural and social curriculum has been completed by 50 elders. These 50 are now engaged in a follow-up program and in recruiting other elders for the next two sessions. In addition, 160 elders are participating in the curriculum now in progress. Upon completion of the current four-week session, it is anticipated that 25 elders will be equipped to serve as trainers in the fall and winter sessions in which a minimum of 200 elders will participate. The 400 plus elders who will ultimately be trained will be provided with ongoing support services to enable them to put their training to use in service to the community.

c. Fifteen Uptown residents participated in the pre-retirement training program in the first three months. In the current quarter

THE UPTOWN ELDERS EDUCATION PROGRAM
Quarter I & II Results/Quarter III & IV Projections

an additional 80 residents will have completed the training program. During the final six months, some 130 persons will have been involved in this aspect of the Elders Education Program. As persons of pre-retirement age complete the two-day training programs, they will be encouraged to join in existing programs to facilitate the transition from full-time employment to meaningful retirement, with an emphasis on utilizing their professional and vocational skills in service to the community.

FOLLOW-UP
PROGRAM
INITIATED

III. The follow-up phase has produced the following results:

a. The Board of Elders was established during the first quarter of the program. Leading elders from the Uptown community were contacted and met regularly to initiate the Uptown Elders Educational Program. Each major elders' residence had a contact person from the Board of Elders who was responsible for promotion and recruitment. Meetings were held to survey major concerns of elders in Uptown. During the second quarter, elders gathered to make proposals in relation to their concerns. Specific proposals were produced in the areas of transportation and crime. During the final six months of the program, the Board of Elders will continue the community meeting format. Task forces will be recruited to deal with particular problems.

b. The Board of Elders engaged in surveys of possibilities for engagement of elders in social agencies in Uptown. They sponsored the opening celebration of the Elders Educational Node. During the next six months, the Board of Elders will be responsible for the recruitment of the elders faculty group, for ongoing activities of the information and social service center, and for the acceleration of the other elders engagement programs.

c. Major groundwork has been done on the establishment of an accredited program for continuing education. Presently, negotiations are underway with the YMCA City College for a joint academic program for elders and other residents of Uptown to be held in the Elders Educational Node.

THE UPTOWN ELDERS EDUCATIONAL PROGRAM

OBJECTIVES	CURRENT STATUS			
	Qtr. I (April-June)	Qtr. II (July-Sept.)	Qtr. III (Oct.-Dec.)	Qtr. IV (Jan.-Mar.)
I. Establish Elders Educational Node	Establishment of Node Distribution of publicity Opening promotion Luncheon for directors of elders agencies Recruitment meetings Materials preparation	Leadership training Evening courses Weekly meetings of grads Community celebrations Accelerated recruitment Continued agency liaison	Elders faculty training Continuing Education Center Weekly Elders Guild meetings Information and Social Service Center	Evaluation Report Continuing Education Center Weekly Elders Guild meetings Information and Social Service Center
II. Develop and implement educational program				
a. Train 1440 elders in 2-day mini-courses	a. 155 participants	a. 1190 participants	a. 495 participants	a. 435 participants
b. Train 225 elders in 4-week cultural and social curriculum	b. 50 participants	b. 160 participants	b. 110 participants	b. 100 participants
c. Train 100 individuals 55 and over in 2-day preretirement training program	c. 15 participants	c. 80 participants	c. 65 participants	c. 65 participants
III. Establish a Board of Elders made up of graduates of the Uptown Elders Educational Program which will:				
a. Act as a coordinating body in the Uptown community in order to represent the concerns of the elder	a. Survey among elders relative to community problems	a. Elders Task Forces engaged in work with community needs and proposals for transportation and crime	a. Elders Task Forces and Community Meetings	a. Elders Task Forces and Community Meetings

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|--|--|--|---|--|
| b. Establish elders' talent pool, consultant advisory group, elders' faculty group, information and social service center, and community celebration guild | b. Survey of community elders' talents and skills | b. Coordination with community agencies for elders' placement | b. Elders' talent pool | b. Elders' Consultant Board and faculty |
| c. Coordinate continuing education programs for elders at local universities and colleges | c. Initial contacts with local colleges and universities | c. Proposal for accreditation of Elders Educational Node program | c. Planned programs with institutions and initial enrollment with 15 elders | c. Coordination with YMCA College and establishment of accredited continuing education program |
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THE UPTOWN ELDERS EDUCATION PROGRAM
BUDGET

The Ecumenical Institute

July, 1974

	QUARTER I April - June, 1974	QUARTER II July - September 1974	QUARTER III Sept. - Dec., 1974	QUARTER IV January - March, 1975
<u>PERSONNEL</u>				
Exec. Director	\$ 3,875	\$ 3,875	\$ 3,875	\$ 3,875
Assoc. Director	3,250	3,250	3,250	3,250
Faculty	16,500 (6 fac.)	66,000 (24 fac.)	16,500 (6 fac.)	16,500 (6 fac.)
Community Activity Staff	2,100	8,400 (4 staff)	2,100	2,100
Secretary	2,100	4,200 (2 sec.)	2,100	2,100
<u>INDIRECT COSTS</u>				
	2,550	5,000	2,550	2,550
<u>PROGRAM COSTS</u>				
Celebrations	-0-	3,000	2,500	1,975
Materials/Promotion	6,000	13,000	6,000	2,250
Agency Liaison	250	275	250	250
Elders Task Forces	2,000	2,300	2,225	2,000
<u>QUARTER TOTAL</u>	37,500	109,300	41,350	36,850
<u>CUMULATIVE TOTAL</u>	37,500	146,800	188,150	225,000
<u>MONIES REMAINING</u>	\$112,500	\$ 3,200	\$ 36,850*	\$ -0-
			*Includes second grant installment	

THE UPTOWN ELDERS
EDUCATIONAL PROGRAM
PROGRESS REPORT

SUBMITTED TO:
Dr. Arthur Fleming, Commissioner on Aging
U.S. Dept. of Health, Education and Welfare
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The main goal of the Uptown Elders Educational Program is to enable elders to recover a sense of meaning and vision in the face of a rapidly changing world and to allow them to see their own unique ability to contribute positively to that world.

The Uptown Elders Educational Program has significantly affected the lives of the more than 30,000 people over 60 who live in Uptown on the north side of Chicago. Through the training courses, which once again stir the excitement of the elder to the possibility of community participation, through continued meetings where their wisdom and skills actually feed into a community reformulation project, through work days which involve them physically in their community, and in festivals where they celebrate themselves as bearers of cultural wisdom and history, the Uptown Elders are beginning to find the 20th century, urban world to be a place of deep engagement in life.

The Uptown Elders Program began in March, 1973. This report will cover the highlights of the past nine months and includes both a narrative description and a set of exhibits. The program descriptions and statistics tell only part of the success story of the Uptown program. A new sense of significance, a willingness to engage in practical problem solving, and an enthusiasm about living in Uptown are all manifestations of the deep changes that have occurred in the elders of this community.

I. To establish an Elders Educational Node which will serve as a training and community center for the elders of the Uptown community.

The Elders Educational Node was established during quarter I of the program in a temporary office and in meeting rooms of the Institute of Cultural Affairs building. The Board of Elders and various community meetings are held here, and office space, printing services and storage space have been made available. An increasing flow of elders from the community is an indication that the Node has become a part of the life of the Uptown elders.

The use of local churches, a retreat center and elders' residence homes for the Elders LENS (Living Effectively in a New Society courses) have made the Educational Node dynamic available to a much broader spectrum of the community.

Present plans for the Educational Node facility include negotiation for a building on the corner of Lawrence and Kenmore across from the Lawrence House to be used as a permanent facility for training and communication in the neighborhood. This building would also provide a place for elders to express their concern and ability in working with the youth of the neighborhood. The elders themselves have stated that they

do not want to have all of their activities and programs done separately, but that they would like to participate in training programs with the middle aged, the young adult and the youth. This would provide them with an objective criteria by which they could judge their effectiveness and see themselves as a part of the community, rather than as cut off from the community.

II. To develop and implement an educational training program for elders which will:

a. Train 1,440 elders in the two-day mini courses.

Five hundred and fifty-six elders have participated in LENS (Living Effectively in the New Society), a think-tank seminar which taps their wisdom and experience in order to focus their concerns for the local community. LENS has enabled the elder participants to grasp themselves as a significant part of the community and effectively make decisions about the life of their neighborhood. The seminar uses the problem solving method, giving the elders a new way of thinking about the future. Each elder engages creatively in solving the problems of their community by working together in teams. The seminar, composed of five sessions, has been taught in several different blocks of time. It may be presented on a weekend, beginning Friday evening and concluding on Sunday. To accommodate the normal routine of the elders' homes where many of these seminars were held, the five sessions were also taught on five consecutive evenings.

Three hundred and ninety-one elders have participated in a one day lab called the Town Meeting, which is a training program for the leaders of the LENS seminars. The format of the Town Meeting is a six hour think-tank which instructs in the methods

of corporate action, problem solving and social motivity.

In addition, in order to explore the basis for broadening the base of the Elders Educational Program, 240 elders participated in intensive training across the nation in the LENS seminars with all ages present.

There was a notable change in the elders who participated in the seminars. They gained a wider perspective of their role in society. They created a new image of community and became familiar with methods for getting a grasp on complex community issues. Sensing that their participation in the on-going building of society was crucial, they decided to engage in that building with enthusiasm and creativity.

II. To develop and implement an educational training program for elders which will:

- b. Train 225 elders in a four-week cultural and social curriculum.

The four week cultural and social curriculum has been completed by an additional 15 elders bringing the total to 225. This is less than we anticipated, but we have discovered that the majority of elders need to move at a slower pace of training. Those that did participate in the four week program were impacted by methods of catalyzing social change in their community, as well as intellectual methods which provided them with ways of re-engaging in study and training. For instance, the method of charting a paper, which involves skim reading and deductive reasoning, released elders who have not read in years to participate in the thinking of some of our great 20th century writers. Workshop methods have enabled them to lead group planning in the elders' homes and with other community people concerned with the development of Uptown. The Town Meeting proposals are a good example of the use of these skills by both elders and other adults. The lecture building method, while not a widely used by the elders, has enabled some of them to stand before a group and focus their wisdom in a compelling presentation.

The Wednesday work session enabled such engagement in the community as a Physical Services Survey, studying the housing and construction in Uptown, a Transportation Study and community work days.

Those who have completed training have since been engaged in setting up other courses, beginning teaching roles such as leading small groups, working on compiling the data from the course surveys and effectively recruiting their colleagues for other community activities.

II. To develop and implement an educational training program for elders which will:

- c. Train 100 individuals 55 and older in a two day pre-retirement training program.

The pre-retirement training program made use of the LENS construct targeted for business and professional people over 55. This seminar had a powerful impact when used with that group of people. The seminar was structured around five sessions, beginning with the corporate visioning of the future, moving through a brainstorm of problems and issues facing the community, and finally articulating proposals for the future and practical means of implementing them. The method pushed the group to deal with the whole social process- economic, political and cultural- while providing the power of workshop methods that release a group creativity that surpasses the imagination of any one individual. The experiment of using the LENS seminar with older business and professional people has allowed their hard won wisdom and maturity to be applied creatively to problems and issues facing the community. munity.

Participants attitude toward their retirement changed noticeably during the course of the seminars. Many who had anticipated their retirement as a welcome chance to retreat from engagement in society expressed excitement at the possibility of finding

ways to apply their experience in new forms of post-retirement vocation. Others who dreaded the empty future announced that they had caught a vision of a new role for the elder in society and expressed a determination to find ways of realizing their vision in their own lives. Many of these LENS graduates have offered their services to the Institute of Cultural Affairs as consultants for the social demonstrations the ICA is creating across the globe.

III. To establish a Board of Elders made up of graduates of the Uptown Elders Educational Program which will:

- a. Act as a coordinating body in the Uptown community in order to represent the concerns of the elders.

The Board of Elders is an established core group of senior citizen graduates of the Uptown Elders Educational Program. The function of the Board is to act as a coordination, liaison body and information resource for the elders in Uptown. This committed leadership group has met weekly for the past six months. All have participated in intensive leadership training in addition to their initial participation in the Elders LENS courses. Members of the Board of Elders have assumed major responsibility for implementation of various aspects of the whole program. The Board operates out of a quarterly plan prepared in Problem Solving Units at the beginning of each quarter. A timeline is developed with specific assignments for the implementation of the planned activities of the Elders Program. The Board has taken responsibility for the recruitment of participants, training of the Associate Teachers, and training of nationwide Elder Core Leadership. A specific effort has been made to contact elders in all fifty senior citizens residences in Uptown in order to systematically recruit participants for the Elders LENS courses and the follow-up programs. The Board has also taken primary

responsibility for the development and implementation of the follow-up extension programs of the Uptown Elders Educational Program, including the Elders Talent Pool, Faculty Group, Information Center, Community Festival Guild and the Continuing Education Program. Members of the Board participate regularly in the Uptown Community Guild with senior citizen service agency personnel in order to integrate the Elders Program activities into the comprehensive community program. The coordinated effort with staff from all agencies associated with services and activities for elders has made possible a significant progress toward the shared goal of effective engagement and care for all elders in Uptown.

III. To establish a Board of Elders made up of graduates of the Uptown Elders Educational Program which will:

- b. Establish 1) an elders' talent pool, 2) a consultant advisory group, 3) an elders faculty group, 4) an information and social services center, and 5) a community festival guild in order to make available information and engagement opportunities for elders.

1) The Elders Talent Pool Task Force was established in October. They are creating a data bank of the skills and talents of all the graduates of the Elders LENS courses with the aid of an elder key puncher. Data is being compiled from registration forms and from various lists of known skills and talents. Board of Elders personnel are alerted to record skill that they discover in their contacts with people. For instance, the creation of five mini-parks in Uptown revealed a number of elders with skills in construction, gardening and organizing work groups. Various celebrative events have disclosed many skilled in the entertainment arts. The Pool will provide a ready source of names and skills for community projects in the future. Approximately one-fourth of the graduates records have been key punched to date.

2) The Consultant Advisory Group has been established sooner than the original timeline indicated because of the need for professional expertise and grassroots input into planning. The Consultant Advisory Group exists in two forms: a) Elder Agency

Luncheons and b) Nationwide Consultant Task Force. The Elder Agency Luncheons are composed of professional staff along with one to five key elders from each of the elders agencies and homes in Uptown, and they have been meeting to review and discuss issues facing elders in this community. Another such luncheon is to be held in November; the exhibit letter gives a picture of the scope of this meeting. The Luncheon provides a consultative dynamic which enables planning to be responsive to the needs of the community and provides an informal assessment of the feasibility of planned events.

b) The Nationwide Consultant Task Force of approximately 30 elder graduates of ICA courses is available to bring their expertise into Uptown and take Uptown methods and models to other areas of the world. For example, elders from 5th City, a Chicago community reformulation project, have visited with Uptown elders to talk about the role of elders in recreating a significant community. Two Aboriginal men from a community reformulation project in Oombulgurri, Australia visited Uptown with a musical program and spoke about the role of the elders in recapturing the stories and heritage of the past and using that wisdom for the future of their neighborhood. Successful models of Uptown are also being taken around the world. One retired military couple is now in Tokyo coordinating recruitment

of Japanese elders for training programs there; and the London training center has the services of an elder librarian for a year. In addition, one elder couple from Uptown went on a ten day consult to Majuro in the Marshall Islands sponsored by the ICA to deal with comprehensive community planning.

3) The Elders Faculty Group has also been established ahead of schedule because of the need for additional teachers for the Elders LENS. The category of Associate Teacher has been designated to include a variety of roles which are crucial to a successful training program, such as recruitment, enablement, administration and teaching. Associate Teachers are LENS graduates and are expected to have a basic knowledge of the dynamics and content of the course. In addition, many of them have participated in the Town Meeting for further training and have indicated that they are willing to be assigned to specific administrative or teaching tasks. A rotation system has been designed so that different Associate Teachers are used in each course in order that a large group be established quickly. Those who then show special aptitude and interest will be invited to more intensive preparation and study as part of their progress toward full Teacher status.

4) The Information and Social Services Center effectiveness has

been increased with the assignment of one member of the Elders Board to coordinate the publicity of various elders' services in Uptown. The Elder Agency Luncheons have also provided an informal means of data exchange. Elders are also active in publicizing Uptown event by distributing posters and brochures in their residences. Elders have helped gather sociological data for assessing community needs by participating in a Physical Services Survey and a Transportation Study. These studies not only gave the participating elders a first hand grasp of community problems, but made that information available to the community and government agencies for further study and action.

In order to keep the community well informed about events and issues all of the 50 elders residence homes in Uptown have been notified about current activities. Forty of the 50 were visited in person. The proposed initiation of a pilot Uptown newspaper this month will provide an additional method of simple, widespread distribution of information.

5) The Community Festival Guild dynamic has been operational for some time as elders participated in planning and enabling a number of celebrative events in Uptown. In April, 500 elders attended the Elders Sweetheart Ball held at the old Aragon Ballroom. The Global Crossroads of the Future Festival was

held in July. Of the 2000 people in attendance, approximately 700 were elders. Five different Uptown Cabarets with about 25 elders performers have provided vocal and instrumental entertainment at elders residences. An Uptown Chorus has been organized and given performances for several community gatherings. At the end of the LENS seminars the presentation of the Certificates of Completion has been the occasion for celebrating the sheer accomplishment of the course itself and the sense the elders have of participating in an activity that will finally make a difference in their community. The elders residence homes have enabled the interaction between the young and the old through invitations to neighborhood childrens groups to come and visit them. In November 80 elementary children went in small groups to some of the residences to present dramas for the elders.

The establishment of a Community Festival Guild in November will formalize this cultural planning activity with work beginning on a Christmas Festival from Many Lands as the first of a monthly festival plan.

III. To establish a Board of Elders made up of graduates of the Uptown Elders Educational Program which will:

- c. Coordinate continuing education programs for elders at local universities and colleges.

A proposal has been submitted to the YMCA College, Office of Program Development, for accreditation of a University 13 program to be held in Uptown. The proposal has been accepted and negotiations for the specific data are underway. The University 13 project will include various ages in the community and is projected to maintain approximately 12 elders for each enrollment period.

University 13 is a pilot experiment that will provide the equivalent of a "liberal arts" education for anyone interested in continuing his formal education in an intensive thirteen week residential program. The project combines the pursuit of an academic discipline with training in common discussion, decision making, and social participation. This project will be effective for all who have the basic educational tools of reading and writing and the skills of abstract relationship of simple arithmetic. Even among those deficient in these skills, as many elders may be, the program is intended to offer remedial assistance so the participant may benefit fully.

University 13 is projected to open in the building on the corner of Lawrence and Kenmore. This location is accessible to the

residences in Uptown.

Negotiations are also underway with the University of Illinois Center for Urban Studies, the University of Chicago Center and other colleges in and near the Uptown community. Senior Citizens will be offered the opportunity to participate in classes at these schools as a means of continuing their education.

Conclusion

In summation, the Uptown Elders Educational Program is a significant demonstration of creative engagement for elders in our society. The program has employed the resources of the entire community, various social agencies, elders homes, businesses and city and state elders service agencies. The talents of all age groups have been tapped in order to restore the elder to his role of wisdom bearer and story teller. The key to this

has been the initiating Elders LENS courses with practical forms of engagement as followup. The total community effort to implement and coordinate the Elders Program has also been important. Celebration of accomplishments in the form of festivals and particularly the celebrative events at the end of each Elders LENS course have been significant for the whole community. Elders who joined the program in April, 1973 now see themselves as leaders in an ongoing community program and in the possibility of extending this program nationwide. Through extensive faculty training this summer and in a 50 city survey conducted by the Institute staff this fall, an overwhelming number of elders would clearly benefit from the program currently in progress in Uptown.

The final results of this program will be realized in the changes in the Uptown community itself. In a community with over 30,000 elders, the impact of an awakened active elder population will evidence itself in concrete forms of social change. For the elders themselves, meaning and vision are being recovered as they see their lives once again useful in the creation of a 20th century community.

Timeline of Activities

THE UPTOWN ELDERS EDUCATIONAL PROGRAM

April - November 1974

Time Program	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER
Establish Elders Educational Node	Office set up in Institute of Cultural Affairs		Distribution of Publicity - Materials Preparation and Promotion			Opening		Negotiations begun for building corner of Lawrence and Kenmore Sts.
Living Effectively in the New Society (LENS) courses	Nationwide Leadership Participation in LENS		LENS (240 Participants) Town Meetings 39 Locations - 391 Participants		LENS Uptown 25 Participants	Elders' LENS Chelsea House (125) Commodore Inn (96)	Elders' LENS Wilton House (120) Kenmore Hse. (49)	Elders' LENS Hollywood House Carlton House (96)
Four Week Cultural and Social Curriculum	Academy Training Program 25 Participants	Academy Training Program 25 Participants		Summer Research Assembly 160 Participants			Academy Training Program 10 Participants	Academy Training Program 5 Participants
Pre-Retirement Training Program Business LENS			New York 25 Participants			San Francisco 40 Participants		Chicago 40 Participants
Board of Elders	Target Recruitment for Board of Elders		Elders Board Meeting Weekly	Intensive Elders Leadership Training	Extension Program Leadership by Board of Elders	Elders Problem-Solving Unit	Elders Quarter Plan and Timeline	
Talent Pool							Task Force Established Data Processing Begun	
Consult Advisory Groups		Elder's Agency Luncheon	5th City Elders Visit	Elders Agency Luncheon	Elders Agency Luncheon Oombulgari Elders Visit	Elder couple to Majuro Consult Librarian sent to London	Elder Couple sent to Tokyo for recruitment	Elders Agency Luncheon
Festival Guild	Sweetheart Ball			Global Crossroads of the Future Festival				Community Festival Guild Established
Continuing Education Program					Elders Faculty Group Established 9 Teachers 30 Associate Teachers			

<div style="text-align: center;">Time</div> <div style="text-align: left;">Program</div>	DECEMBER	JANUARY	FEBRUARY	MARCH
Establish Elders Educational Node			Set up of elders Educational Node and Extension Program in new facility	
Living Effectively in the New Society (LENS) courses	Town Meetings Locations: 250 Elder participants	Elders' LENS - Normandy Terrace - 30 participants	Elders' LENS - Lakeside Manor 25 participants	
Four Week Cultural and Social Curriculum		Academy Training Program 10 Participants	Academy Training Program 10 Participants	
Pre-Retirement Training Program Business LENS		Washington, D.C. 40 participants		Houston 35 participants
Board of Elders	Intensive Elders Leadership Training - 20 Participants	Elders Quarter Plan		Intensive Elders Leadership Training - 20 Participants
Talent Pool		Survey of Uptown Agency need for talent pool skills	Talent Pool Task Forces for Festivals and extension program participation	
Consult Advisory Groups		Elders Agency Luncheon		
Festival Guild	Elders Christmas Dance			Elders Program Completion Festival
Continuing Education Program	Recruitment of Elders for University 13			University 13 opens with 15 Elders registered

THE UPTOWN ELDERS EDUCATIONAL PROGRAM

INDEX OF EXHIBITS

Uptown Elders

Chelsea House Newsletter

Participants' Final Document: Elders LENS

Report on Town Meeting- October 19, 1974

Uptown Tactical Calendar- 1974-75

Uptown Planning Retreat- 1974-75

Letter to Elder Agency Luncheon members- November 7, 1974

LENS Brochure.

THE UPTOWN ELDERS EDUCATION PROGRAM

FINAL REPORT

THE INSTITUTE OF CULTURAL AFFAIRS SEPTEMBER 27, 1978

THE UPTOWN ELDERS EDUCATIONAL PROGRAM

I. PROGRAM DESCRIPTION

The Uptown Elders Education Program was designed by the Ecumenical Institute and The Institute of Cultural Affairs and funded by a \$ 175,000 grant from the Department of HEW, Grant No. AoA Grant: 90-A-86, from April 1, 1974 through March 31, 1975. Under the conditions of the grant the Institute was responsible for the following objectives:

- a) Establishing an Elders Educational Node which would serve as a training and community center for the Elders of the Uptown community.
- b) Developing and implementing an educational and training program for elders.
- c) Establishing a Board of Elders made up of graduates from the Uptown Elders Education program to coordinate elders activities in the Uptown Community.

II. PROGRAM ACHIEVEMENT

- a) Appendix 1. is a calendar of the actual activities that were held in the Uptown community during the term of the grant. The node was located at the offices of the Institute at 4750 North Sheridan Road, Chicago 60640.
- b) Appendices 2 and 3 name the location of the LENS 2-day mini courses held in the Uptown community and across the nation. A total of onethousand threehundred seventy three elders participants in sixteen Uptown Elders seminars and twentynine National LENS seminars. In addition twohundredtwentyfive elders went through a four week cultural and social program in Chicago during the months of April, May, July, October, and November 1974.
- c) A Board of Elders was established which met weekly beginning in April of 1974 and continued throughout the duration of the grant term. Eight to thirtytwo elders were in attendance at any given meeting with a leadership core of fifteen providing the overall implementation of the program.

III. PROGRAM STAFFING

The total program was staffed by an Executive Director, an Associate Director, a Community Activity Worker, Secretary, and 6 faculty for a period of 9 months of the grant. An additional twenty nine personnel were provided in task force groupings for one to four months duration. All of the staff for the program were provided by The Order: Ecumenical which is a volunteer service group incorporated by the

individual staff members of the Institute. This allows the individual staff of the Institute to be self-supporting by seeking employment independent of the Institute's programs. The salaries earned in this fashion are pooled and redistributed to the individual family members. This allows the staff to be independent of the ebb and flow of contributions to the Institute. In the case of the grant from HEW, salaries were written into the grant prior to its approval by HEW.

Direct services by Institute staff included:
Nine man months each for the Executive Director and the Associate Director. Four personnel provided sixteen man months of Community Activity Staff. Two personnel provided ten man months of secretarial staff. Thirty one personnel provided one hundred fifteen man months of faculty task forces. Because of the concentrated nature of the program and its rapid acceptance it required a task force concept to provide all of the personnel required.

The Uptown Elders Lens Seminars were held in 5 one-half day sessions. Each seminar was staffed with a faculty team of 6 personnel who devoted 8 man days each to set-up, teach, prepare, evaluate and debrief each program. This required 35 man months of time for 16 seminars.

The National LENS seminars were held on three consecutive days. A faculty team of 6 personnel staffed each program and devoted 6 man days to preparation, travel, teaching, set-up, evaluation, and debriefing. This program required forty seven man months of task force time for twenty nine seminars.

Six faculty devoted 2 months each on curriculum and materials creation, development, and refinement for a total of twelve manmonths. Finally, thirteen personnel were involved in the four week cultural and social program. A total of twenty one man months was required by this effort.

IV. AWARD PAYMENT

The provisions of the grant awarded \$ 145,375 in salary. This was paid out as checks to the Executive Director and the Associate Director. A third check for \$ 124,000 was paid directly to The Order: Ecumenical for services rendered (one hundred forty one man months) to fulfill the program. This had been agreed to in writing between the Chief Executive Officer of the Institute and the President of The Order: Ecumenical. It had been verbally agreed to by officials of HEW, but it had not been put in writing. The payment of the check was in accordance with our normal staff policy in regard to salaries earned by its members. An Invoice was provided to the Institute by The Order: Ecumenical which constituted back-up for issuing the check.

It was later pointed out to the Institute by its independent auditors, Arthur Andersen & Co., that the award of a lump sum check for task force salaries did not meet the condition of the grant. In August of 1978 auditors from the Department of HEW who inspected the books, pointed out that this may have been technically correct, but it did not breach the spirit of the grant award.

Back up records to the original invoice, which detailed the actual personnel charged to the grant, had been destroyed by 1978. This report was pulled together in September of 1978 by going back to the archives and original records of the individual programs actually conducted.

V. SUMMARY

It is the conclusion of the Institute that the objectives of the grant award have been fulfilled. It is further concluded that the Institute provided a fair value in personnel services under the conditions of the grant award.

The financial statements and records of the Institute for the time of the grant award under discussion have been audited by the Internal Revenue Service of the Department of the Treasury. As a result of their examination we have continued to be recognized as tax-exempt. A copy of their report is appended to this brief.

ELDERS PROGRAM-UPTOWN LENS SEMINARS

CHICAGO, ILLINOIS

APPENDIX 2.

SPONSORING AGENCY	LOCATION	# OF PARTICIPANT
1. WILTON HOUSE	1039 LAWRENCE AVENUE	48
2. CARMEN MANOR	1470 CARMEN STREET	47
3. COMMODORE INN, INC.	5547 KENMORE AVENUE	69
4. EDGEWATER NURSING AND GERIATRIC CENTER	5838 NORTH SHERIDAN ROAD	47
5. BRIGHTVIEW MANOR CONVALESCENT HOME	4538 BEACON	56
6. CHICAGO HOUSING AUTHORITY SENIOR BUILDING	5040 KENMORE AVENUE	50
7. LAWRENCE HOUSE	1020 LAWRENCE AVENUE	85
8. CHELSEA HOUSE	920 WILSON AVENUE	65
9. CHICAGO HOUSING AUTHORITY SENIOR BUILDING	1039 HOLLYWOOD	55
10. SELF HELP HOME FOR THE AGED	908 WEST ARGYLE	50
11. MID-AMERICA CONVALESCENT CENTER	4920 KENMORE AVENUE	65
12. CHICAGO HOUSING AUTHORITY SENIOR BUILDING	4945 NORTH SHERIDAN ROAD	63
13. CHICAGO HOUSING AUTHORITY SENIOR BUILDING	4645 NORTH SHERIDAN ROAD	55
14. BEACON HILL NURSING HOME	4530 NORTH BEACON	58
15. DEVON-SHERIDAN OLD AGE HOME	DEVON AVENUE	89
16. KENMORE PLAZA	5225 NORTH KENMORE	<u>65</u>
TOTAL # OF PARTICIPANTS		967

ELDERS PROGRAM NATIONAL LENS SEMINARS

CHICAGO, ILLINOIS

APPENDIX 3.

COURSE LOCATION	DATE	COURSE LOCATION	DATE
1. MINNEAPOLIS, MINNESOTA	MAY 3-5, 1974	20. KANSAS CITY, KANSAS	OCT 25-27, 1974
2. WICHITA, KANSAS	MAY 3-5, 1974	21. ROCHESTER, NEW YORK	OCT 25-27, 1974
3. BOSTON, MASSACHUSETTS	MAY 3-5, 1974	22. MIAMI, FLORIDA	OCT 25-27, 1974
4. CHICAGO (FIFTH CITY), ILLINOIS	MAY 3-5, 1974	23. BOSTON, MASSACHUSETTS	NOV 1-8, 1974
5. CLEVELAND, OHIO	MAY 10-12, 1974	24. RICHMOND, VIRGINIA	NOV 1-8, 1974
6. DENVER, COLORADO	MAY 10-12, 1974	25. SACRAMENTO, CALIFORNIA	NOV 8-10, 1974
7. INDIANAPOLIS, INDIANA	MAY 17-19, 1974	26. CHICAGO (LOOP), ILLINOIS	NOV 8-10, 1974
8. KANSAS CITY, KANSAS	MAY 17-19, 1974	27. MINNEAPOLIS, MINNESOTA	NOV 15-17, 1974
9. MIAMI, FLORIDA	MAY 17-19, 1974	28. RAPID CITY, SOUTH DAKOTA	NOV 15-17, 1974
10. NEW HAVEN, CONNECTICUT	MAY 17-19, 1974	29. NEW YORK CITY, NEW YORK	NOV 15-17, 1974
11. NEW ORLEANS, LOUISIANA	MAY 24-26, 1974		
12. OKLAHOMA CITY, OKLAHOMA	MAY 24-26, 1974		
13. PHILADELPHIA, PENNSYLVANIA	MAY 24-26, 1974		
14. PHOENIX, ARIZONA	MAY 24-26, 1974		
15. WASHINGTON, D. C.	MAY 24-26, 1974		
16. ST. LOUIS, MISSOURI	MAY 31-JUN 2, '74		
17. AMARILLO, TEXAS	OCT 11-13, 1974		
18. SAN FRANCISCO, CALIFORNIA	OCT 14-16, 1974		
19. ST. LOUIS, MISSOURI	OCT 14-16, 1974		
		TOTAL # OF SEMINARS = 29	
		AVE. # OF ELDERS PARTICIPANTS/SEMINAR = 14	
		TOTAL # OF ELDERS PARTICIPANTS = 406	

1 640 9th Ave. S.W., Aberdeen, S. Dak. 57401
2 17 N. Dearborn St., Chicago, Ill. 60602
3 210 Walnut St., Des Moines, Iowa 50309
4 653 Second Ave. N., Fargo, N. Dak. 58102

5 517 E. Wisconsin Ave.
Milwaukee, Wis. 53202
6 15th and Dodge Sts., Omaha, Nebr. 68102
7 1114 Market St., St. Louis, Mo. 63101

8 Federal Building and U. S. Courthouse
316 Robert St., St. Paul, Minn. 55101
9 325 W. Adams St., Springfield, Ill. 62704

Address any reply to DISTRICT DIRECTOR at office No. _____

Department of the Treasury

District Director Internal Revenue Service

Date: 18 AUG 1977

In reply refer to:

E. Longstreet

353-3211



▷The Ecumenical Institute
4750 North Sheridan Road
Chicago, Illinois 60640

Form Number: 990 and 990-T
Periods Ended: 7412

We are pleased to tell you that as a result of our examination for the above periods we will continue to recognize your organization as tax-exempt.

We have indicated below whether there is a change in your liability for the unrelated business income tax as provided by sections 511 through 515 of the Internal Revenue Code.

- There is no change.
- You will receive an examination report explaining the proposed adjustments.

Thank you for your cooperation.

Sincerely yours,

Handwritten signature of the District Director.

District Director

Address any reply to:

230 S. Dearborn St., Chicago, Illinois 60604

Department of the Treasury

District Director

Internal Revenue Service

Date: 30 JAN 1978

In reply refer to:

E. Longstreet 353-3211



The Institute of Cultural Affairs
4750 North Sheridan Road
Chicago, Illinois 60640

Form Number: 990
Periods Ended: 7512

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