

Recommendations for a Statewide Aging Study *Communities and Aging Carolinians— on Edge*



Dennis W. Streets

N.C. Division of Aging and Adult Services

Background to Report

- Senator Soles responded to Brunswick municipalities by introducing S.B. 448
- Members of the House Aging Committee expressed interest and broadened the scope—adding five counties (Buncombe, Gaston, Henderson, Moore, and New Hanover) and asking DHHS/DAAS to offer recommendations for a comprehensive statewide aging study
- DAAS submitted an interim report on the six counties on November 1, 2007 and will submit a final report by April 1, 2008
- DAAS submitted the report for the comprehensive study on January 2, 2008

Senate Bill 448 (Section 2 of S.L. 2007-355)

In response to growth projections for the population age 60 and older, the General Assembly directed the Division of Aging and Adult Services to make recommendations to the NC Study Commission on Aging on a study to include all counties. DAAS was to evaluate similar studies conducted by other states in identifying the criteria to be included in such a study and in recommending an appropriate level of funding to support this effort.

Background to Planning for an Aging North Carolina

- Since 1989, DAAS has been charged with producing a state aging services plan
- In its 1991 Plan and subsequently, DAAS has proposed investing in planning at the state, regional and local levels
- Since 2003, DAAS has promoted the concept of livable and senior-friendly communities

Livable and Senior-Friendly Community Components

- **Physical and Accessible Environment** (e.g., transportation, walk-ability, housing/utilities, air/water quality, zoning)
- **Healthy Aging** (e.g., wellness/fitness, hospitals, immunization, medication management, mental health)
- **Economic Security** (e.g., age discrimination, health/LTC care cost)
- **Technology** (e.g., Internet access, assistive devices, telemedicine)
- **Safety and Security** (e.g., fraud/abuse/neglect prevention, fire safety, emergency response)
- **Social and Cultural Opportunity** (e.g., lifelong learning, diversity, volunteerism, community sensitivity, media)
- **Access and Choice in Services and Supports** (e.g., info & assistance, home/community-based services, caregiver support, end-of-life care, legal services)
- **Public Accountability and Responsiveness** (e.g., public/private funding, taxes, planning/evaluation, needs assessment, public benefits)

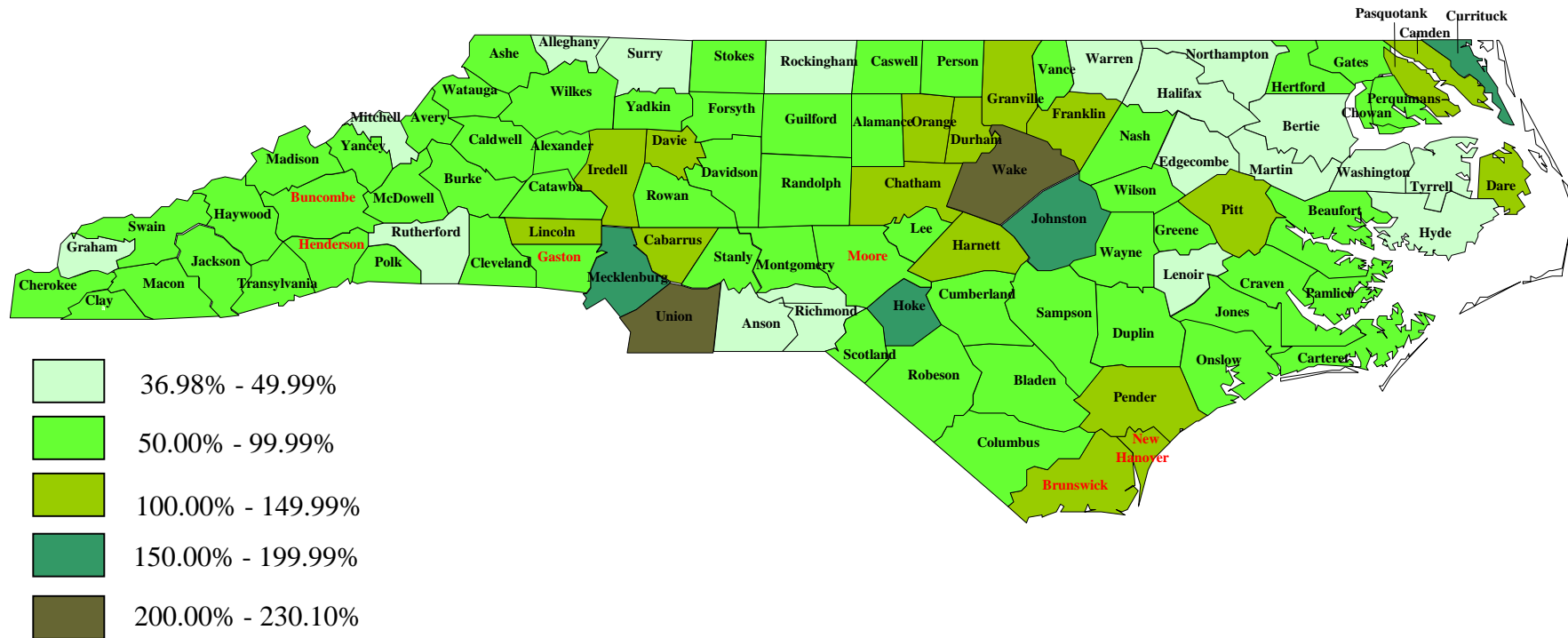
Context—Driving Forces

- Demographic shift
- Concern about level of awareness and interest
- National expectations, initiatives, and opportunities

Startling Statistics

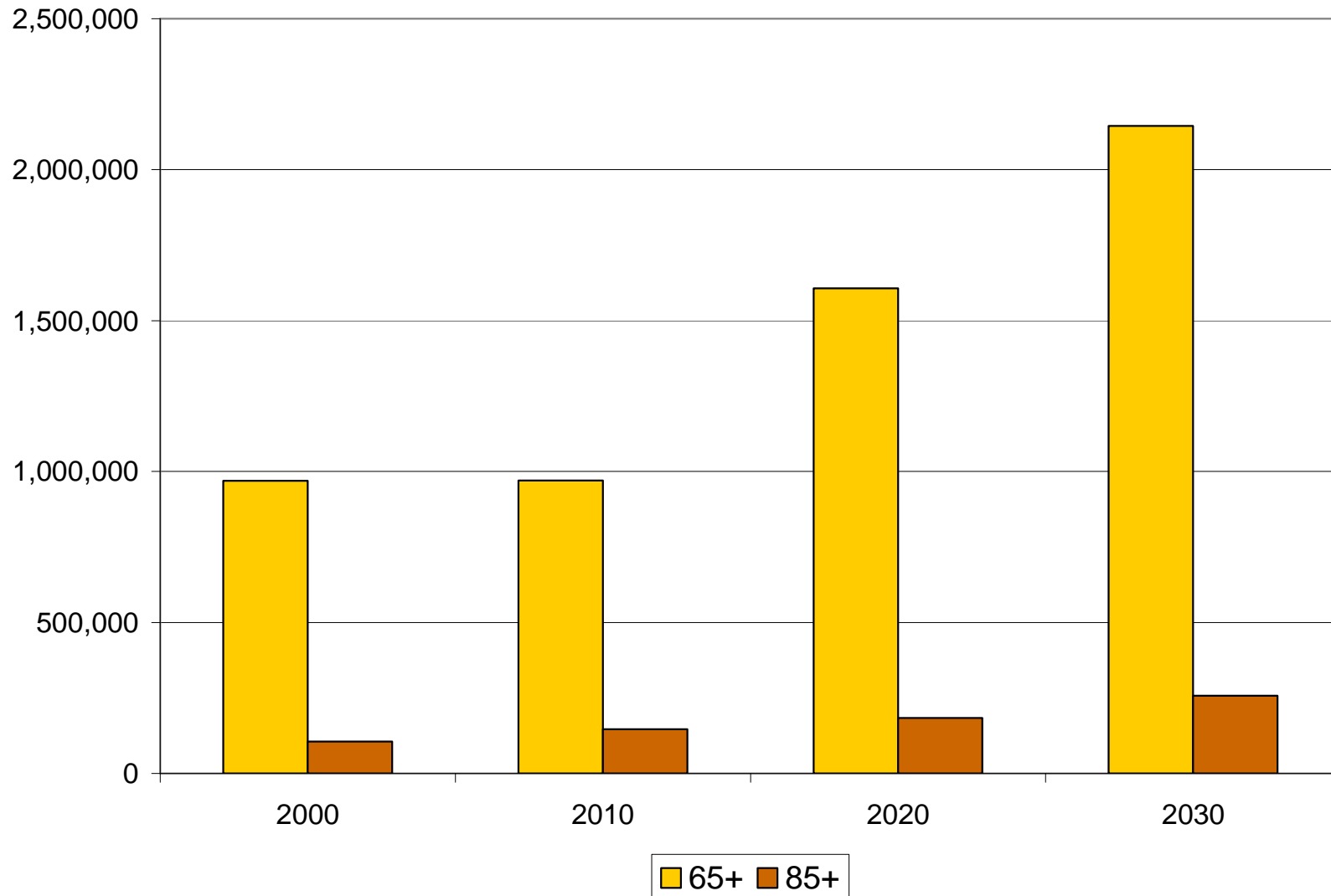
- Today 28 of our counties have more persons age 60 and older than 17 and younger— projected to increase to 75 counties by 2030
- Even among the 25 more 'youthful' counties tremendous growth among older persons is expected—with Wake having the highest projected rate among all counties—projected to grow from 81,000 seniors in 2005 to more than 267,000 in 2030 (230%)

Projected growth of older population 60+ from 2005-2030



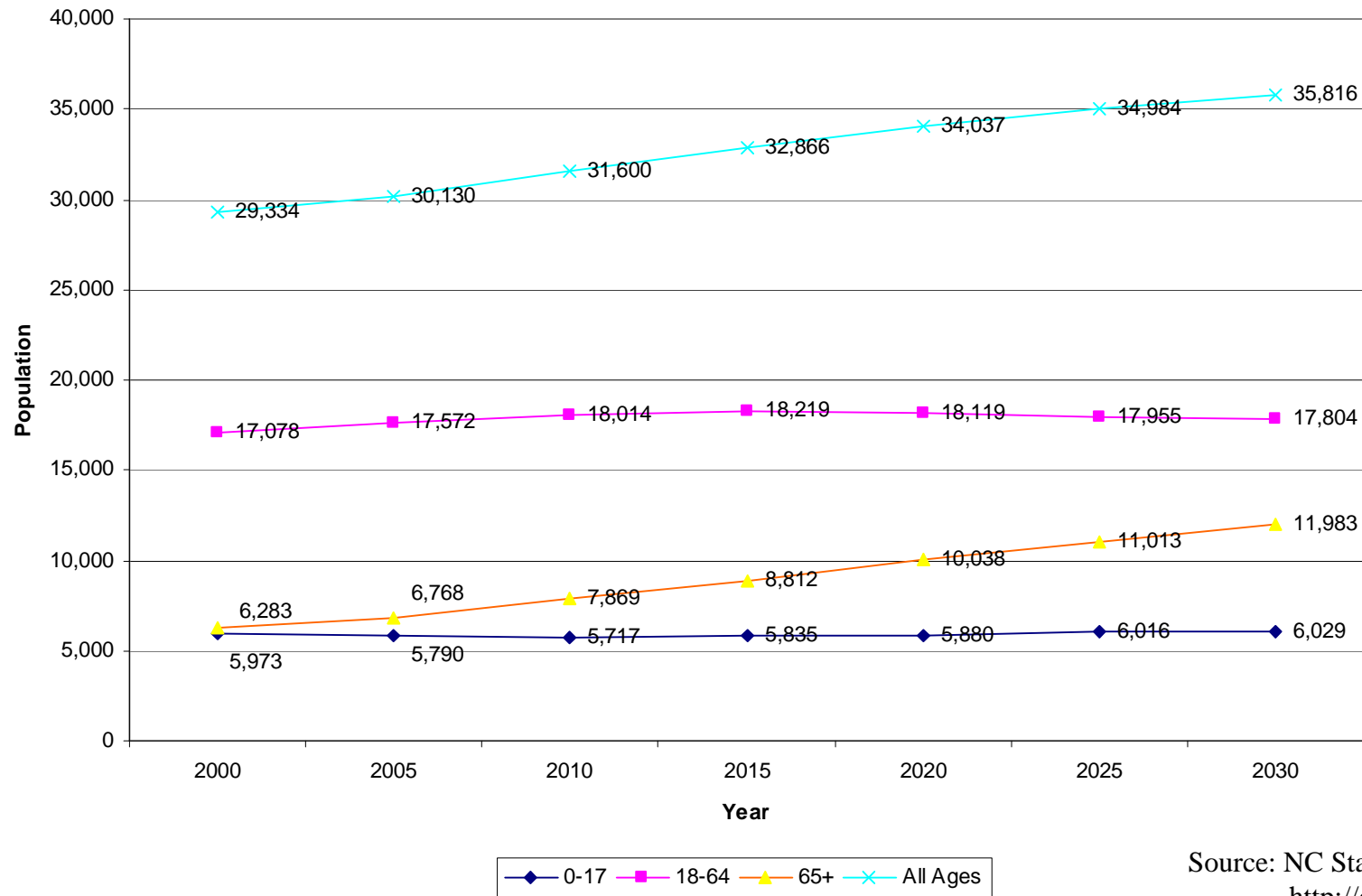
Source: NC State Demographics
<http://demog.state.nc.us/>

Projected Growth of Older North Carolinians, 2000 to 2030



An 'Extreme' County Example

Projected Population Growth by Age Group in Transylvania County (2000-2030)



Source: NC State Data Center
<http://demog.state.nc.us/>

Existing Awareness and Interest

- The national 2005 *The Maturing of America* survey found that less than half of American communities have started addressing the needs of their aging population—"although many communities have some programs to address the needs of older adults, few have undertaken a comprehensive assessment to make their communities "elder friendly" or "livable communities for all ages."
- Among the 278 NC local governments that were contacted for this survey, only 18% of cities and towns responded along with 31 counties

What We Learned from NC's 64 Respondents— Just a Sample



Item	NC	National
Access to prescription programs	78%	64%
Access to Dial-a-Ride service (door-to-door para-transit)	44%	47%
Local parks and other venues that have safe, accessible walking/biking trails	92%	82%
Road signage that meets the needs of older drivers	20%	30%
Discounted taxi cab and/or bus fares	28%	34%
Side walks and street crossings that are safe and accessible for older pedestrians	53%	62%
Sidewalk system linking residences and essential services	41%	51%
Experiencing in-migration of older adults	64%	38%
Local government has solicited information from older adults in past 3 years to determine their needs (surveys, etc.)	47%	39%
Local government has begun to plan for growing senior population	53%	48%

National Expectations, Initiatives, and Opportunities

- The 2006 amendments to the Older Americans Act give State Units on Aging and Area Agencies on Aging an enabling charge (not a requirement) but no new funding—to assess the aging readiness of the state and regional planning and service areas
- In 2006, NC was selected as one of eight states to help develop a national model for comprehensive planning for aging
- NC has received grants under the federal *Choices for Independence* initiative in all three areas—empowering individuals with information, providing choices for high-risk, and building prevention into community living

Observations on Current Capacity

- It is beyond the *current* capacity of any entity to undertake a comprehensive assessment of the aging of North Carolina's population
- NC has far to go in understanding and responding to the many and varied implications of its aging population

Findings from Other States

- Among 20 states that responded to our request, 15 indicated that they had undertaken a comprehensive statewide study in the past 5 years
- Among the 15 states, 13 had used outside entities to do some or all of the study
- The reported cost ranged from \$20,000 to \$500,000 for the *survey(s)*

States that Reported a Statewide Aging Study within Past 5 Years

- Arizona
- Connecticut
- Colorado
- Florida
- Georgia
- Illinois
- Indiana
- Kentucky
- Minnesota
- Nevada
- New York
- Texas
- Vermont
- Washington
- Wisconsin

Notable Findings

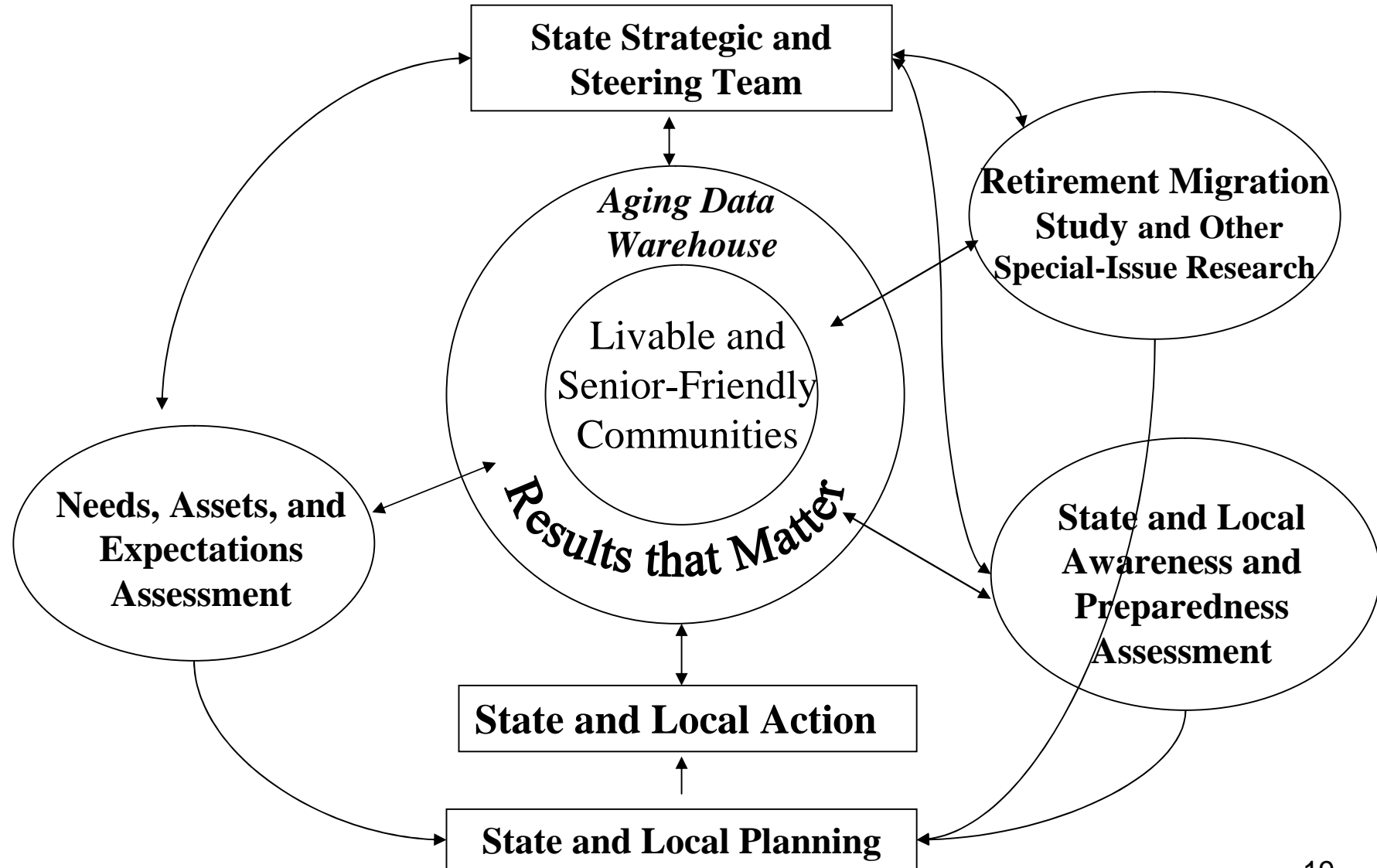
- Leadership in some states came from the Governor's Office and/or Legislature
- States emphasized that the important work does not end in a study—it is just the beginning
- Some states have set in place expectations and processes for regular updates
- There was strong positive sentiment on its value

Recommendations

Undertake *Project CACE, Communities and Aging Carolinians—on Edge*

- Create state strategic and steering team
- Assess consumer needs, assets, and expectations
- Assess state and local awareness and preparedness
- Conduct special studies
- Support state and local planning
- Create an aging data warehouse

Project CACE



State Strategic and Steering Team

Build on experience of Minnesota, New York and Texas

- Recommend that executive and legislative branches appoint this blue-ribbon group and assure adequate resources for its work
- Provide overall management for Project CACE

Fiscal Note: \$225,000 [R]

Consumer Needs, Assets, and Expectations Assessment

Build on experience of Colorado, Florida, Kentucky, Minnesota, Texas and Wisconsin

- Conduct survey twice over 5-year period
- Focus on population age 45+ and use livable and senior-friendly community framework
- Assure adequate representation of target populations
- Produce state and regional (AAA) summaries, and findings for county-types that can be supplemented with focus groups, key informant input, etc.
- Promote linkage between academic institutions and local planners

Fiscal Note: \$200,000;\$175,000 [NR]

State Executive Assessment

Build on experience of Minnesota, New York and Texas

- Legislature and/or Governor requires all relevant state agencies to assess the implications of the aging population on their programs and services and report findings and recommendations
- Would be done every other year over 5-year period
- Use web-based application to facilitate response and minimize cost
- State Strategic and Steering Team would prepare summary document for Governor and General Assembly

"The Project 2015 initiative has provided a process of planning, engagement and action by 36 participating New York State government agencies to prepare for the impact of the aging and increasing diversity of our state's population....In the years since the initial strategic planning took place, [participating] agencies have successfully used their planning document (agency brief) as the basis for adopting new approaches to better serve our aging, more diverse population."

Examples of Agencies to Be Included

- Administration
- Agriculture and Consumer Services
- Commerce
- Community Colleges
- Correction
- Crime Control and Public Safety
- Cultural Resources
- Employment Security Commission
- Environment and Natural Resources
- Health and Human Services
- Housing Finance Agency
- Insurance
- Justice
- Labor
- Revenue
- State Personnel
- Transportation

Local Assessment

Build on 2005 *Maturing of America* survey

- Work closely with the NC Association of County Commissioners and NC League of Municipalities
- Would be done every other year over 5-year period
- Use web-based application to facilitate response and minimize cost
- Use core set of questions based on livable and senior-friendly community framework, with counties able to add limited number to meet specific local needs
- State Strategic and Steering Team would prepare summary document, to include promising practices and new initiatives—with input from AAAs working with local academic institutions

Fiscal Note: \$75,000 for each of 3 years [NR]

Special Studies

- Retirement Migration
- Other studies as determined by the State Strategic and Steering Team

Fiscal Note: \$50,000 [R]

State and Local Planning and Development

- Assure adequate resources to effectively use information gathered
- Assure adequate local and regional capacity to plan and respond to the aging population—increase support for AAAs and provide base support for each county

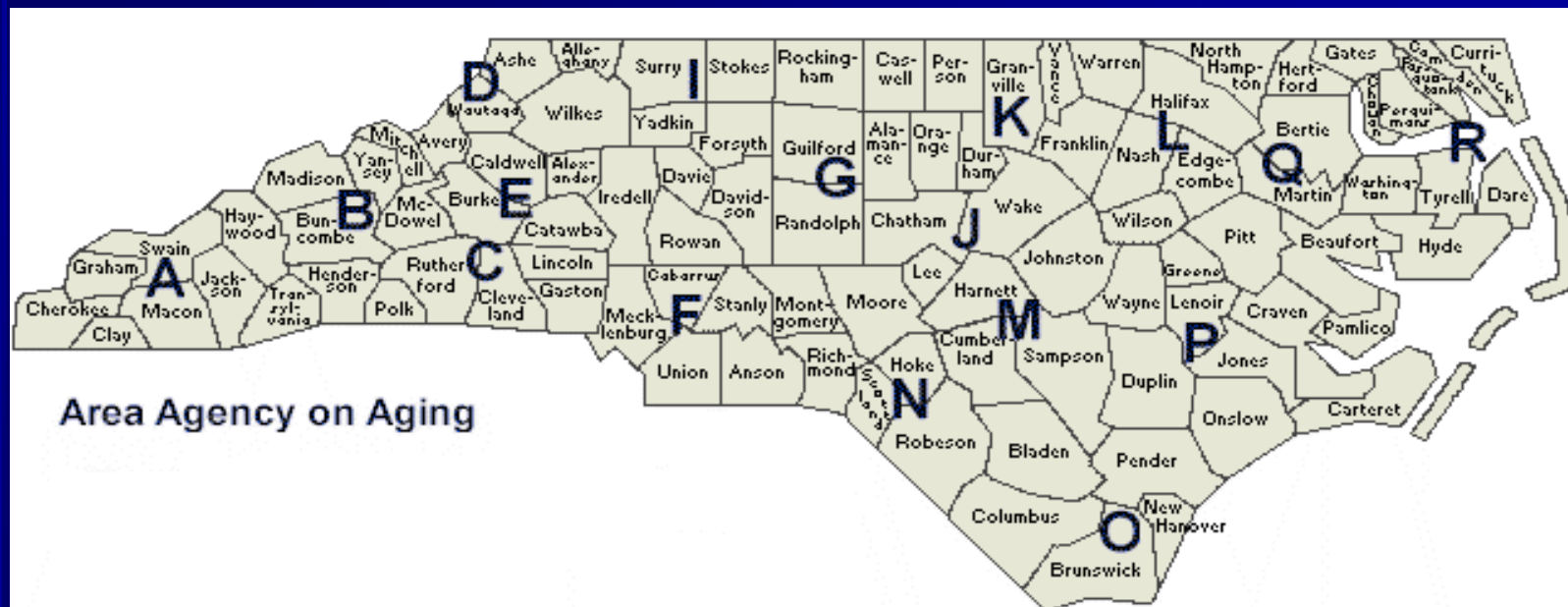
Planning is only as good as the action it inspires.

Example Core Elements of ***Local Aging Leadership Planning Team***

- Integrates or at least connects with other local planning (e.g., Healthy Carolinian, smart growth, mental health reform, DSS social planning)
- Has solid connections with Senior Tar Heel Legislature and Community Advisory Committees—*Is citizen-driven*
- Reports significant work and issues to county officials
- Has ways to involve many interests/entities while still maintaining a manageable number of committee members and a manageable structure
- Encourages use of service provider collaborative (e.g., Senior Roundtable) as a group to address the Planning Committee's recommendations
- Uses livable and senior-friendly community framework

Area Agencies on Aging

Located in the regional Councils of Government. AAAs have functions in five basic areas: (1) funds administration and quality assurance; (2) planning; (3) program and resource development; (4) information brokerage; and (5) advocacy.



Relevant AAA Roles

- Encourage and facilitate local Aging Leadership Planning Teams and other local and regional planning that involves not only local governments but also the private sector
- Research information and mine data to produce reports to aid state, regional and local planning
- Use regional summaries and county-type reports to inform local governments and agencies and support local Aging Leadership Planning Teams
- Identify, document and disseminate 'promising practices' and offer relevant training and tools
- Assist with program, resource and systems development as needed
- Assist with tracking and measuring outcomes of work

Aging Data Warehouse

- Accessible information is vital for effective planning
- Information on services, costs, and results is fragmented
- State Strategic and Steering Team would examine state of affairs and consider need for results-based data warehouse

Fiscal Note: To be determined

Total Fiscal Notes

- \$3,720,000 in recurring funds
- \$600,000 in non-recurring
- Cost of aging data warehouse to be determined in future

These funds would be less than 0.143% of what we are currently spending publicly—not counting Social Security, Medicare, or VA benefits—less than \$1 in planning for each \$1,000 spent for services and supports.



“To me there is something thrilling and exalting in the thought that we are drifting forward into a splendid mystery—into something that no mortal eye hath yet seen, and no intelligence has yet declared.”—Edwin H. Chapin

**Making Places More Livable and *Senior-Friendly* =
Better Communities for All—**

It's a Personal and Community Responsibility

***“The future is not some place we are going to, but one we are creating. The paths are not to be found, but made, and the activity of making them changes both the maker and the destination”—
John Schaar***

