

Recommendations from the NCIOM Task Force on Healthy Aging

Michelle Ries, MPH, President & CEO

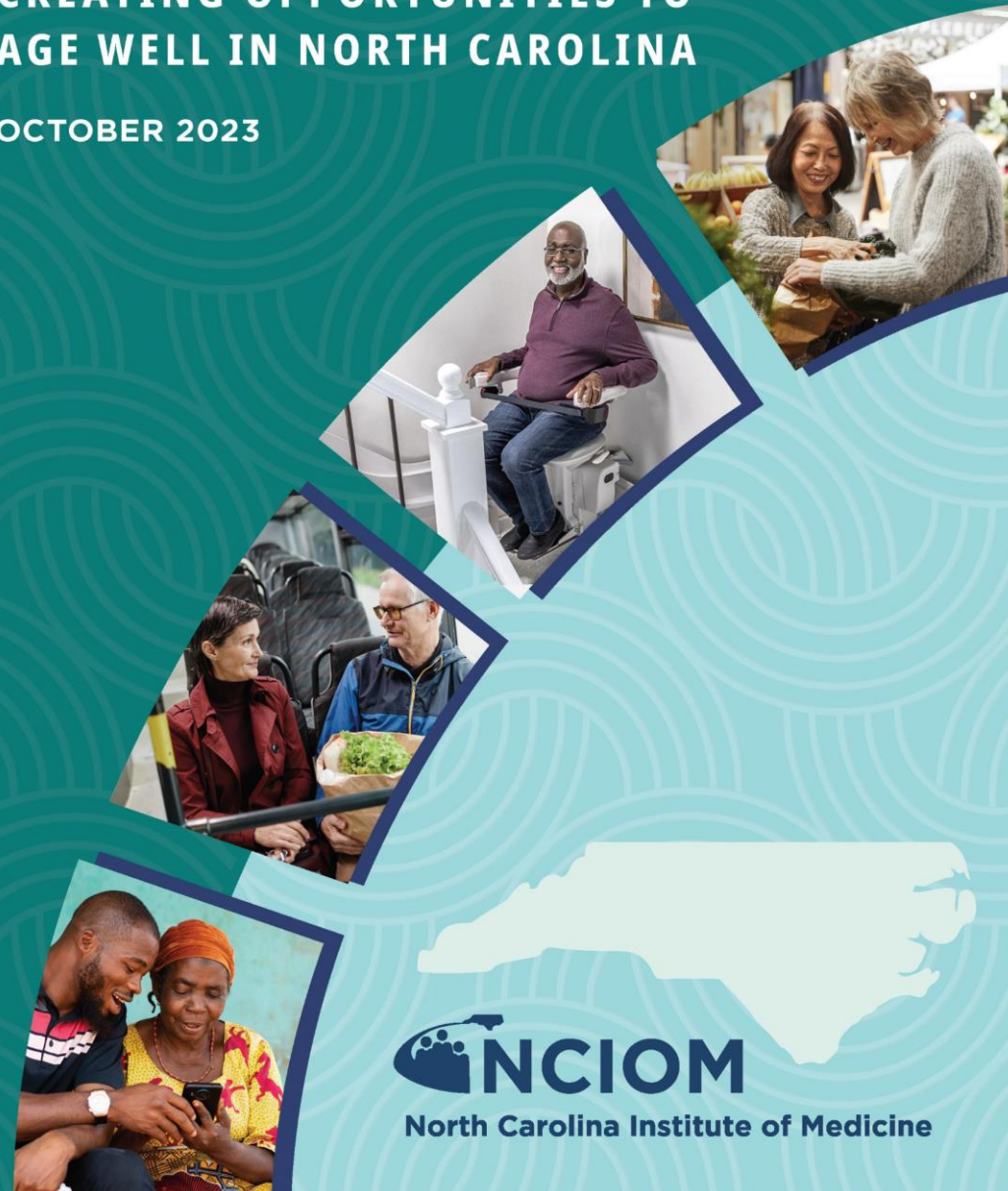
Brienne Lyda-McDonald, MSPH, Project Director
NCIOM

May 21, 2024

A PLACE TO THRIVE

CREATING OPPORTUNITIES TO AGE WELL IN NORTH CAROLINA

OCTOBER 2023



Task Force on Healthy Aging

How can we support healthy aging related to:

- Falls prevention
- Mobility
- Food security/nutrition, &
- Social connections?

What are the structures, investments and policies needed to get there?

Task Force on Healthy Aging

Partnerships:

- Division of Aging and Adult Services
- Division of Public Health
- Falls Prevention Coalition
- AARP NC

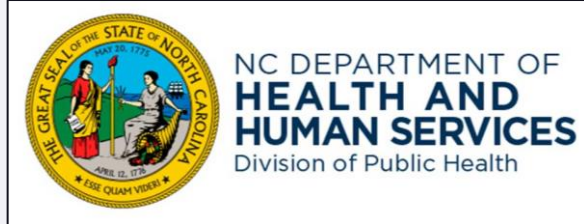
Process:

11 Task Force Meetings

35+ Key Informant/ Small Group discussions



Task Force on Healthy Aging



Co-Chairs



Tamara Baker, PhD, MA

Professor, Department of Psychiatry, School of Medicine
University of North Carolina at Chapel Hill



Dennis Streets

Retired, Former Director of the North Carolina Department of Health and Human Services, Division of Aging and Adult Services,
Former Executive Director, Chatham County Council on Aging

Membership from:

- Aging
- Falls Prevention
- Transportation
- Active Living
- Housing
- Senior Centers
- AAAs
- Health Equity
- Local Public Health
- Local Government
- Business
- State Government
- Philanthropy
- Food/Nutrition
- Broadband
- And more...



Aging His Way with a Dedication to Health and Leadership



Corbin exercising

Corbin is a community leader who strives to care for his health so he can be there for his family. Growing up as the son of older parents, he saw them experience poor health later in life, which he says has given him “an appreciation of **controlling the things I can control like diet, exercise, and sleep.**” As he turns 54, his drive to stay healthy has “clicked into a different level.”

His family’s extensive service in the military—Corbin himself is a former Marine—has played a part in his drive to be at his best. About a year ago he started lifting weights and now does so six days a week. He says, **“It’s so much fun! Even at an age where I don’t know if I’m sore or if it’s arthritis.”**

Corbin’s drive to stay physically active and healthy motivates and encourages other people. He served as Vice Chairman of the Lumbee Tribe in Pembroke, North Carolina, from 2017 to 2023. His time in leadership was filled with immense challenges for the community as they experienced Hurricanes Matthew and Florence and the COVID-19 pandemic. During those times he saw many tribal members displaced from their homes without transportation, shelter, or food. Other tribal members stepped in to fill needs, and partnerships were developed to provide services. Even with all those efforts, he saw people falling through the cracks. Although he sometimes wonders what more he could have done, he has realized that even if one person can’t solve every problem, **“if you can improve things or make people aware of what is available, then you have done good work.”**

Corbin’s experience during those times. He stayed in a hotel for a while and learned how to stay healthy. **It is a good solution to imagine small**

How would this impact the health of older adults?



Older adults who are actively working are generally more physically active and less likely to develop the bodily weakness associated with an increased risk of falls.



The increased physical activity associated with working can help older adults to maintain mobility longer and have a reason to do so.

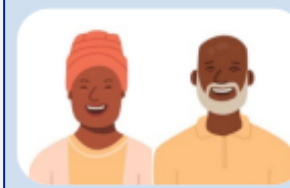


Older adults who maintain an active income are more likely to be able to afford nutritious food.



Working provides opportunities to interact with coworkers, decreasing the chances of loneliness or social isolation.

Final Report



Clara and Robert have been married for 45 years. They have many close friends that live nearby who they enjoy sharing meals and conversation with and they attend a church down

the street from their home. Their income was never high enough to allow them to qualify for a home loan, so they rent their current home. They live on a limited retirement income and Robert has a part-time job to help supplement it. Recently, developers have come into their neighborhood to purchase homes and businesses for redevelopment. This has increased rental costs and concerns that they will need out of the community to seek out more affordable housing. They hope they can find something close enough to rent community to maintain connections with their church, and access to bus service that is convenient to Robert’s job. Clara has some difficulty with mobility such as climbing stairs, so any new housing they find had to be accessible for her.

This is a composite story to depict the real-life experiences of older adults.



Final Recommendation Categories

- Social & economic factors that affect how we experience aging
- Culture of aging across the lifespan
- Community services and programs
- Workforce to meet the needs of older adults

Each category has several recommendations →
Recommendations have related strategies



Recommendation Categories

- **Social & economic factors that affect how we experience aging**
- Culture of aging across the lifespan
- Community services and programs
- Workforce to meet the needs of older adults



Social & economic factors that affect how we experience aging

Recommendations in this category:

1. Help older adults retain more financial and material resources to support healthy aging
2. Ensure safe and affordable housing for older adults
3. Ensure digital equity for older adults

Recommendation #1 - Help older adults retain more financial and material resources to support healthy aging

Strategy 1 – Help more North Carolinians plan and save for retirement

NORTH CAROLINIANS NOT COVERED BY SMALL BUSINESS RETIREMENT PLAN:

BY RACE & ETHNICITY	Hispanic	67%
	Asian	54%
	Black (Non-Hispanic)	53%
	White (Non-Hispanic)	42%
BY INCOME	\$18,001 to \$31,000 (per year)	65%
	\$31,001 to \$50,000 (per year)	44%
	\$50,001 to \$78,000 (per year)	29%
BY BUSINESS SIZE	Less than 10 employees	79%
	10–24 employees	67%
	25–99 employees	55%
	1,000 or more employees	34%

Source: AARP Fact Sheet: North Carolina. Payroll Deduction Retirement Programs Build Economic Security. <https://www.aarp.org/content/dam/aarp/ppi/2022/state-fact-sheets/north-carolina.doi.10.26419-2Fppi.00164.035.pdf>

“ Over 48 percent of North Carolina private sector workers ages 18 to 64 in 2020 were employed by businesses that do not offer any type of retirement plan. ”

- AARP Fact Sheet – North Carolina. <https://www.aarp.org/content/dam/aarp/ppi/2022/state-fact-sheets/north-carolina.doi.10.26419-2Fppi.00164.035.pdf>



Recommendation #1 - Help older adults retain more financial and material resources to support healthy aging

Strategy 1 – Help more North Carolinians plan and save for retirement

- a. The North Carolina Office of State Human Resources should identify opportunities to assist state employees with comprehensive pre-retirement education and planning related to finances, housing, and transportation needs for aging.
- b. The North Carolina General Assembly should establish a state-facilitated program to help businesses offer paycheck deductions for retirement savings if they are currently not offering a retirement plan.**

Recommendation #1 - Help older adults retain more financial and material resources to support healthy aging

Strategy 3 – Update tax policy to help older adults with lower incomes

The North Carolina General Assembly should review and update income and property tax policies related to older adults to provide tax relief for those most in need.

Tax policies to be reviewed include:

- Homestead Property Tax Exclusion
- Circuit Breaker Tax Deferment
- Refundable Earned Income Tax Credit
- Income and age brackets currently in place for older adults

Recommendation #1 - Help older adults retain more financial and material resources to support healthy aging

Strategy 5 – Reduce the costs of health care coverage

Medicare Savings Program (MSP)

A program available to older adults with low incomes that helps pay for Medicare premiums, and in some cases cost-sharing for services.

Monthly costs associated with Medicare that MSP benefits can assist with may include:

- Part B premium for outpatient care – \$164.9/ month
- Part B deductible – \$226
- Physician and mental health services, outpatient therapy, and durable medical equipment – 20% co-pay for all services, no limit
- Part D premium – \$34.71/ month (basic premium)
- Part D deductible – \$505
- Part D copayments – vary from plan to plan

Recommendation #1 - Help older adults retain more financial and material resources to support healthy aging

Strategy 5 – Reduce the costs of health care coverage

The North Carolina General Assembly should increase access to health insurance and reduce costs to older adults with lower incomes by:

- a. Using its authority to reduce eligibility requirements for income and assets for the Medicare Savings Programs for lower income adults.
- b. Increasing funding for outreach to inform consumers of opportunities for Medicare Savings Programs and the Part D “Extra Help” benefits for those with limited incomes.
- c. Supporting outreach to older adults who are newly eligible for Medicaid due to the state’s expansion of Medicaid eligibility.

Recommendation #2 - Ensure safe and affordable housing for older adults

Strategy 7 – Ensure statewide focus on housing availability, affordability, and supports for older adults

Housing for Older Adults

- 29% of North Carolinians aged 62+ live in households with serious housing issues:
 - Lack of complete kitchen
 - Lack of plumbing
 - Overcrowded
 - Cost-burdened
- In some areas of the state, 20%–30% of homeowners aged 65 and older are cost-burdened.
- In some areas of the state, 30-50+% home renters aged 65 and older are cost-burdened.

Recommendation #2 - Ensure safe and affordable housing for older adults

Strategy 7 – Ensure statewide focus on housing availability, affordability, and supports for older adults

- a. Conduct a statewide comprehensive assessment of current and future housing needs and programs to address home building and home modification
- b. The North Carolina General Assembly, the Office of the Governor, and the North Carolina Housing Finance Agency should work together to:
 - i. Review results of the housing needs assessment recommended and appoint a task force to:
 - 1. Identify policy options to address issues
 - 2. Identify effective incentives for home builders and buyers
 - 3. Identify opportunities to increase the service area for Centers for Independent Living
 - ii. Increase funding to support and sustain the North Carolina Housing Trust Fund.



Recommendation Categories

- Social & economic factors that affect how we experience aging
- **Culture of aging across the lifespan**
- Community services and programs
- Workforce to meet the needs of older adults



Culture of aging across the lifespan

Recommendations in this category:

4. Create a community culture that supports healthy aging
5. Collaborate to encourage actions that support healthy aging across the lifespan

Recommendation #5 - Collaborate to encourage actions that support healthy aging across the lifespan

Strategy 16 – Ensure Legislative Attention to Aging Issues

The North Carolina General Assembly should ensure that legislative committee structures promote discussion and review of policy that impacts older adults, family caregivers, and aging across the lifespan.

Recommendation Categories

- Social & economic factors that affect how we experience aging
- Culture of aging across the lifespan
- **Community services and programs**
- Workforce to meet the needs of older adults



Community services and programs

Recommendations in this category:

6. Strengthen existing programs and services
7. Include aging in local public health & hospital community health assessments
8. Connect health care with aging issues

Recommendation #6 - Strengthen existing programs and services

Strategy 17 – Strengthen North Carolina's local senior centers

Individual services:⁸

- Information and referral
- Case assistance
- In-home assistance
- Home-delivered meals
- Job search and training
- Legal assistance
- Health insurance counseling and claims assistance
- Transportation
- Volunteer opportunities

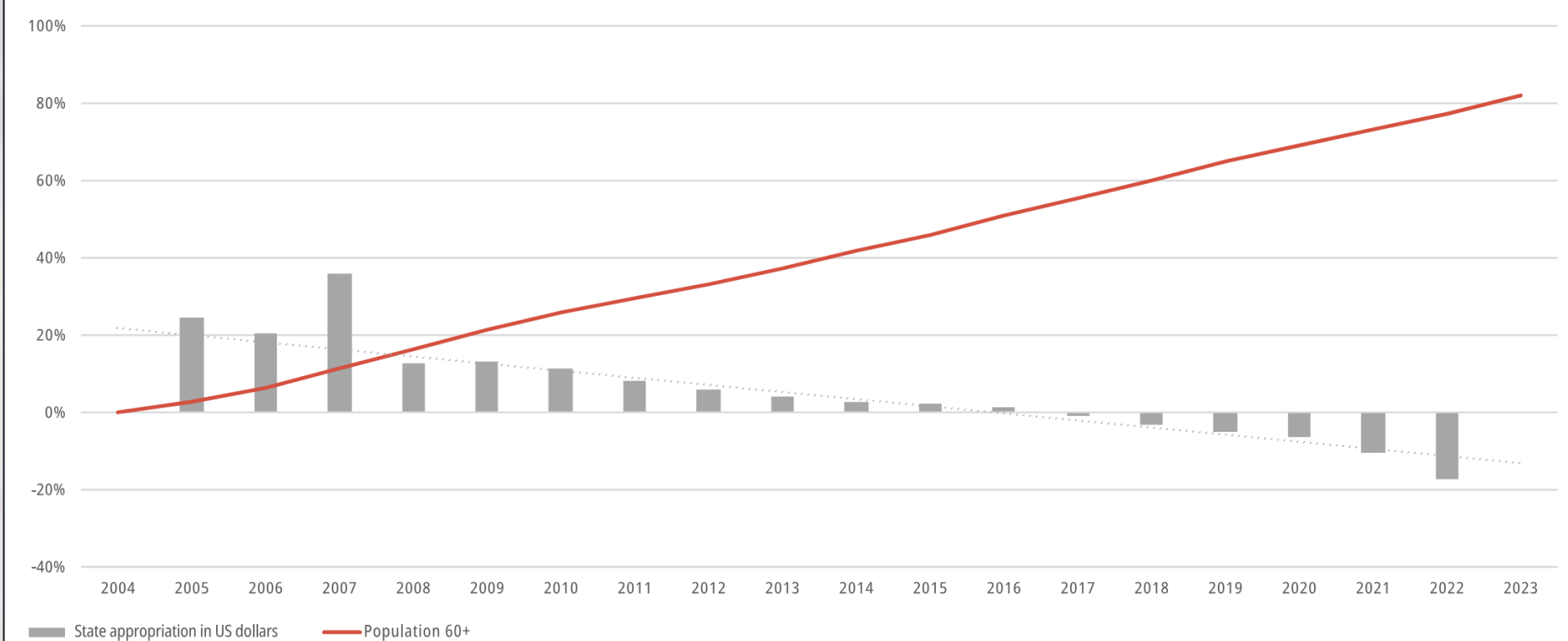
Group services:

- Congregate meals
- Educational sessions
- Cultural events
- Health education sessions and wellness activities
- Retirement planning
- Support groups
- Community service projects
- Intergenerational programs
- Recreational trips

Recommendation #6 - Strengthen existing programs and services

Strategy 17 – Strengthen North Carolina's local senior centers

FIGURE 5. Senior Center General Purpose Funding, Adjusted for Inflation, Compared to Change in 60+ Population, 2004-2023



Source: Senior Tar Heel Legislature Priority #2, Funding for NC Senior Centers. <https://ncseniortarheellegislature.org/wp-content/uploads/2023/01/2023-24-STHL-LEGISLATIVE-PRIORITIES-FACT-SHEETS.pdf>

Recommendation #6 - Strengthen existing programs and services



Supported by NCDHHS DAAS

Strategy 17 – Strengthen North Carolina's local senior centers

The North Carolina General Assembly should support the 2023–2024 Senior Tar Heel Legislature priority to “Increase Recurring Funding for Senior Centers by \$1.26 Million”.

As part of this funding increase, the General Assembly should also request a study of the current senior center certification program.



Recommendation #6 - Strengthen existing programs and services

Strategy 18 – Increase access to the Program of All-Inclusive Care (PACE) for the Elderly

PACE

- Community-based managed care program for older adults with complex medical needs.
- Provides integrated preventive, acute, and long-term care services, including:
 - Transportation
 - Meals at home
 - Dentistry
 - Primary care
 - Behavioral health

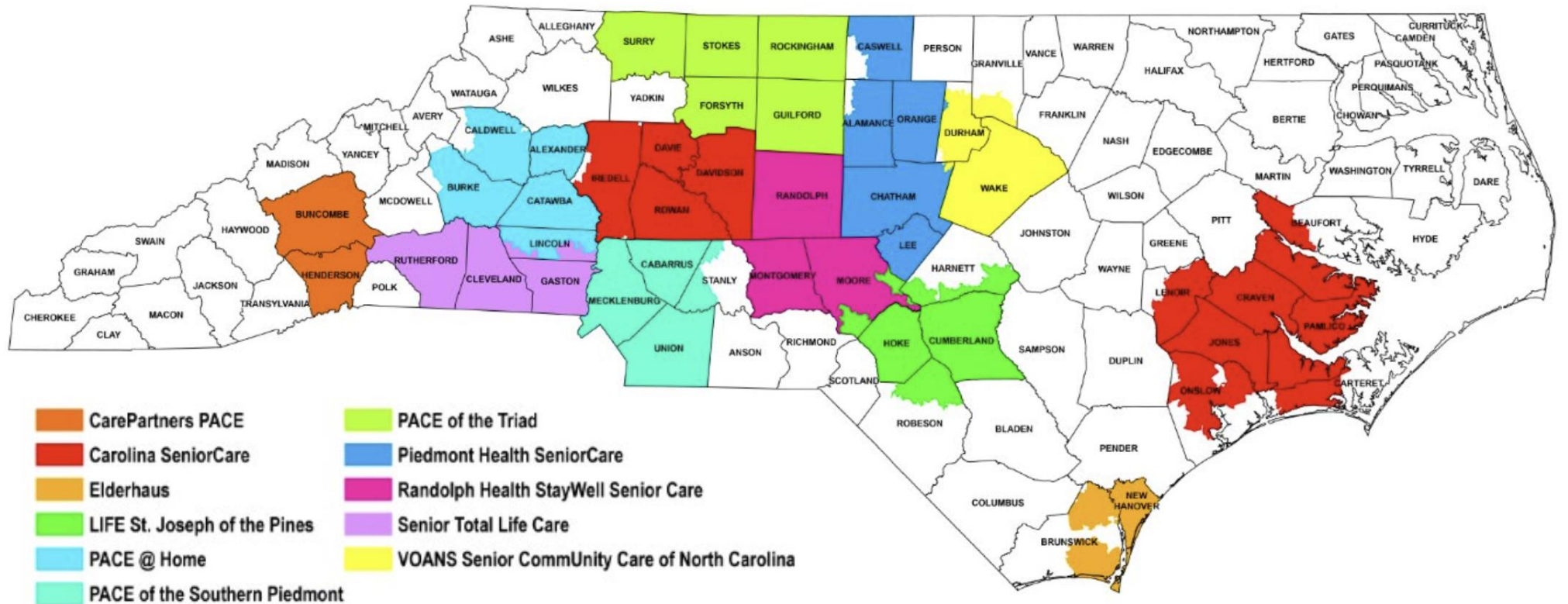
Eligibility:

- Aged 55 or over
- Certified to need nursing home care
- Living in a PACE service area
- Able to live safely in the community with PACE support at the time of enrollment

Recommendation #6 - Strengthen existing programs and services

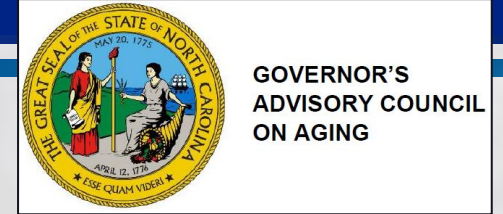
Strategy 18 – Increase access to the Program of All-Inclusive Care (PACE) for the Elderly

FIGURE 6. PACE Organizations in NC Service Areas



Source: NC PACE Association. <https://www.ncpace.org/PACE-Programs-in-NC>

Recommendation #6 - Strengthen existing programs and services



Strategy 18 – Increase access to the Program of All-Inclusive Care (PACE) for the Elderly

- a) NC Medicaid should help to increase access to PACE through improved eligibility and enrollment processes.
- b) The General Assembly should help to increase access to PACE by fulfilling the recommendation of the Governor's Advisory Council on Aging to expand program availability throughout the state.

Recommendation #6 - Strengthen existing programs and services

Strategy 20 – Conduct research and evaluation on current programs to increase access

Adult Day Health Programs

- Provide a coordinated program and services for adults in a community-based group setting.
- Services are designed to provide social and some health services.
- Offer caregivers respite from responsibilities of caregiving.
- Services can include social activities, transportation, meals and snacks, personal care, and therapeutic activities.
- Participants experience improvements in physical and emotional health and perceived well-being.

Recommendation #6 - Strengthen existing programs and services



Strategy 20 – Conduct research and evaluation on current programs to increase access

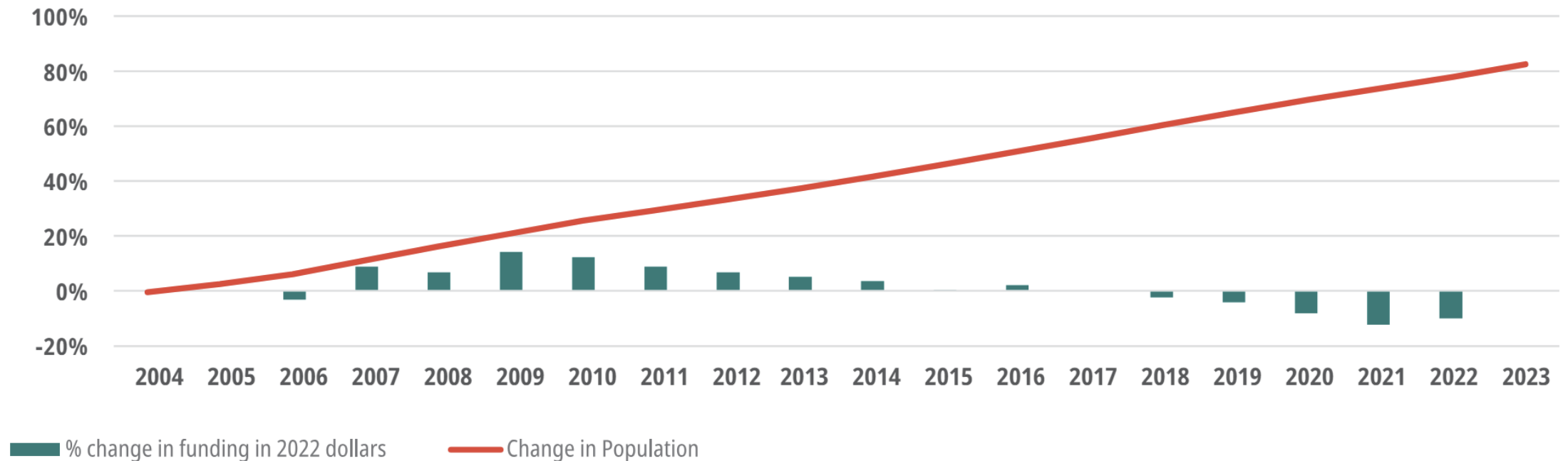
The North Carolina General Assembly should fund:

- i. A study to understand the adult day health programs.
- ii. The UNC General Administration System to support research and evaluation studies, with input from the North Carolina Division of Aging and Adult Services, that would inform future aging service planning and development.

Recommendation #6 - Strengthen existing programs and services

Strategy 21 – Increase and Modernize the Home and Community Care Block Grant (HCCBG)

FIGURE 7. Change in HCCBG Appropriation (Adjusted for Inflation) and 60+ Population Growth, SFY 2004-2023



Source: NC Senior tar Heel Legislature. Priority #3. Funding for NC Home & Community Care Block Grant. <https://ncseniortarheellegislature.org/wp-content/uploads/2023/01/2023-24-STHL-LEGISLATIVE-PRIORITIES-FACT-SHEETS.pdf>

Recommendation #6 - Strengthen existing programs and services

Strategy 21 – Increase and Modernize the Home and Community Care Block Grant (HCCBG)

FIGURE 8. Services Funded Under the Home and Community Care Block Grant

Congregate Nutrition	Housing and Home Improvement	Institutional Respite Care
Home-Delivered Meals	Information and Case Assistance	Health Screening
Adult Day Care	In-Home Aide	Health Promotion and Disease Prevention
Adult Day Health Care	Senior Companion	Mental Health Counseling
Care Management	Transportation	Senior Center Operations
Skilled Home (Health) Care	Group Respite	Volunteer Program Development

Source: Fiscal Research Division. Presentation to Joint House and Senate Appropriations Committees on Health and Human Services. Division of Aging and Adult Services (DAAS) Overview. <https://webservices.ncleg.gov/ViewDocSiteFile/75939>

Recommendation #6 - Strengthen existing programs and services



Strategy 21 – Increase and Modernize the Home and Community Care Block Grant (HCCBG)

The North Carolina General Assembly should:

- a. Fulfill the Senior Tar Heel Legislature’s recommendation to increase recurring state funding for the HCCBG)by \$8 million.
- b. Fund the North Carolina Division of Aging to:
 1. Study and update HCCBG policies that impact how local providers can use funds.
 2. Improve provider reimbursement to streamline data-sharing and increase capacity for evaluation.
 3. Modernize the Aging Resources Management System (ARMS) as a tool for provider reimbursement and program planning and evaluation



Recommendation #6 - Strengthen existing programs and services

Strategy 22 – Strengthen Adult Protective Services (APS)

What Is Adult Protective Services?

“ Services provided to ensure the safety and well-being of elders and adults with disabilities who are in danger of being mistreated or neglected, are unable to take care of themselves or protect themselves from harm, and have no one to assist them. ”

- APS Presentation to the NCIOM Task Force on Healthy Aging

- 10%+ of older adults are abused in some way each year
- NC APS statute written in 1975 and has not been updated
- Current law does not address self-neglect and other maltreatment with early action

Recommendation #6 - Strengthen existing programs and services



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Strategy 22 – Strengthen Adult Protective Services (APS)

The North Carolina General Assembly should:

- 1) Work with APS and other partners to evaluate the current state statute for APS to identify opportunities for modernization and funding.
- 2) Fulfill the 2023–2024 Senior Tar Heel Legislature priority of increasing recurring funding for Adult Protective Services by \$8 million.



Recommendation Categories

- Social & economic factors that affect how we experience aging
- Culture of aging across the lifespan
- Community services and programs
- **Workforce to meet the needs of older adults**



Workforce to meet the needs of older adults

Recommendations in this category:

9. Ensure an adequate aging network workforce for the future
10. Ensure a strong community workforce to serve older adults
11. Improve ability of community health workers to address the needs of older adults
12. Support family caregivers

Recommendation #12 – Support family caregivers

Strategy 30 – Increase Access to Employment and Well-Being Support for Family Caregivers

Family Caregiving

- Estimated 1.28 million family caregivers in NC who provide over 1 billion hours of care per year.
- Family caregiving is uncompensated.
- Nationally, around 30% of caregivers are in the “sandwich” generation.
- Most family caregivers work either full-time or part-time, with 54% working in hourly wage positions.

Recommendation #12 – Support family caregivers

Strategy 30 – Increase Access to Employment and Well-Being Support for Family Caregivers

The North Carolina General Assembly can support older adult employees and caregivers of older adults, people with disabilities, and children by:

- i. Implementing family and medical leave for all state employees.
- ii. Adopting policies like Family Medical Leave Insurance
- iii. Exploring policies that support business owners who want to adopt family-friendly workplace policies.
- iv. Exploring policies to support counseling and support services for family caregivers.

Governor Roy Cooper commits the state to improvements that benefit all ages

By Steve Hahn , May 02, 2023 03:15 PM



Assistance ▾ Divisions ▾

**All Ages,
All Stages NC**

MPA: All Ages, All Stages NC

Contact

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