



ELEVATING VOICES

STRATEGIC RECOMMENDATIONS FOR THE
CALIFORNIA MASTER PLAN FOR AGING

OCTOBER 2019



CONTRIBUTORS ON THIS PROJECT

All the insights and many of the strategies shared in this report are a direct reflection of what we heard from older adults, people with disabilities, and their care teams. We thank them for their openness and willingness to share, often intimate, details about their lives and experiences.

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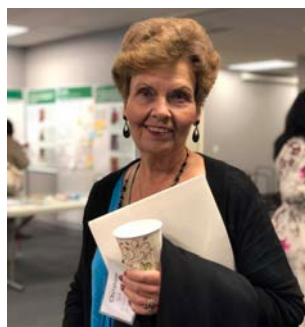


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On June 10, 2019, California Governor Newsom issued Executive Order N-14-19, calling for a Master Plan for Aging. The Executive Order requires this Master Plan for Aging to serve as a blueprint for state and local government, the private sector, and philanthropy to implement strategies and partnerships that promote healthy aging for all Californians and prepare the state for the coming demographic changes. For more information about the Executive Order, visit [The SCAN Foundation website](#).

To ensure the voices of older Californians and people with disabilities are integrated into the development of the Master Plan for Aging, Greater Good Studio (GGS) spent several months learning directly from them, and those who support them.

GGS conducted “[day in the life](#)” research sessions with over 20 older adults and their care teams to understand their activities, behaviors, needs, and assets related to their long-term care and quality of life.

Five community design workshops with over 300 stakeholders were also held. Participants included older adults, people with disabilities, service providers, government agencies, city and county elected officials and many “day in the life” participants. Collectively, the [workshops generated over a thousand concepts](#) aimed at improving the experience of aging in California that became the basis for the recommended strategies.

In addition to a range of ideas, these convenings also [surfaced larger societal issues](#), such as deep economic disparities, as root causes of many of the challenges faced by older adults and people with disabilities. This provoked conversations around systemic solutions to combat extreme poverty, such as raising the federal poverty line and expanding governmental assistance in the forms of Medicare, Medicaid, and Supplemental Security Income (SSI).

This process uncovered several insights and strategies that are articulated through a strategic framework. The first part of this framework is [a set of principles](#), that articulate the highest levels of insights and serve as an overlay to the recommendations. The second part of this framework are [three quality of life elements](#) that deeply impact the ability for older adults to fully thrive — the physical environment, supportive services, and social and emotional well-being. The last part of this framework identifies [28 strategies](#), or high-level recommendations per each quality of life element, followed by a range of more detailed concepts.

MASTER PLAN FOR AGING PRINCIPLES

Emerging directly from the voices of real people, and overarching above the quality of life elements, the plan for Aging Principles articulate the highest levels of insights. While the sentiments expressed may not seem new or revolutionary, these six principles are significant enough to be reiterated, stated explicitly, and overlaid into recommendations for the Master Plan for Aging. They continue to underscore the need for a comprehensive plan that is grounded in the lived experiences of all Californians. For more details on the purpose of the Master Plan for Aging Principles and how they emerged, see [page 154](#).

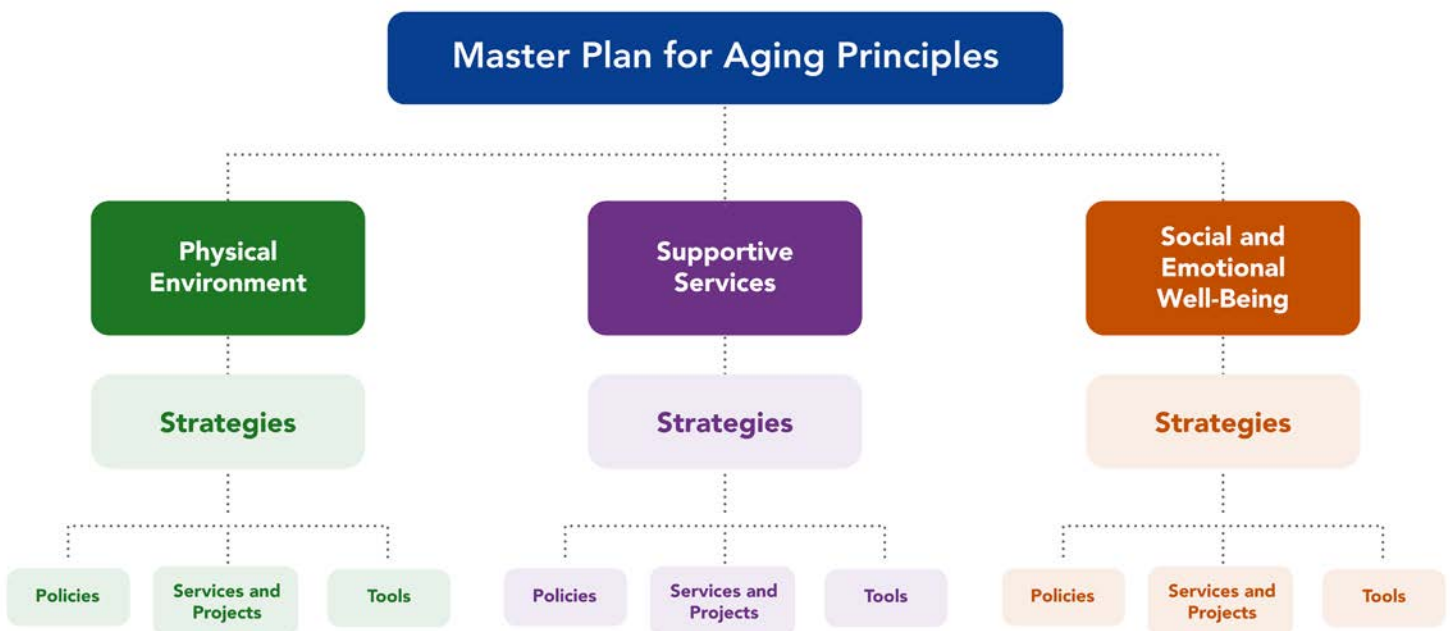
1. Reframe the narrative to focus on aging as a universal experience.
2. Integrate aging into all systems and agencies, rather than keeping it siloed.
3. Recognize and address the impact of identity factors such as race, gender, ability, economic status, and sexual orientation in all efforts.
4. Efforts related to older adults and people with disabilities should be done in tandem with one another.
5. Develop policies, programs, services, and tools rooted in on-the-ground realities.
6. Take a personalized and culturally sensitive approach to solutions, rather than a “one size fits all” application.

QUALITY OF LIFE ELEMENTS

The research uncovered that there are three areas that deeply impact the ability for older adults to fully thrive. The **physical environment** — their homes, their neighborhoods, and the amenities that are, or are not, present; **supportive services** — the formal supports available to them, be it health care, meal delivery, care coordination, or otherwise; and **social and emotional well-being** — their overall mental health, how valued and supported they feel, and the quality of their relationships with others.

STRATEGIES

Through this process, 28 strategies, or high-level recommendations, have been developed for the state of California to move toward. While the tactical solutions may change depending on need, feasibility, and time, the strategies are designed to remain constant and serve as a 'north star' for the Master Plan for Aging. Within each strategy, there are a range of concepts that can give inspiration for advancing the strategy. These concepts range from policies, services, and projects to more tactical tools. Details on these concepts can be found in the full report.



STRATEGIES

PHYSICAL ENVIRONMENT

The priorities that are **bolded** delineate the strategies that were identified as being of highest priority to the attendees of the Master Plan for Aging Forum held in September 2019. For more specific concepts (ideas on policies, services, projects, and tools) relating to these strategies, see [page 17](#).

NEIGHBORHOOD

- » **Design for mixed-age, mixed-ability neighborhoods with amenities that meet people's physical, social, and emotional needs.**
- » Design intergenerational spaces and communities.
- » Prioritize health and safety in both existing communities and in the design of new developments.
- » Include the voices of older adults and people with disabilities in planning and development processes.

TRANSPORTATION

- » **Make travel convenient and affordable for older adults and people with disabilities.**
- » Develop transportation options that can meet a variety of accessibility needs.
- » Coordinate transportation offerings across public agencies, social service providers, and private entities in order to make them easily navigable.

HOUSING

- » **Remove financial and regulatory barriers that prevent older adults and people with disabilities from acquiring and keeping their housing.**
- » Make it easier to build a variety of housing types for diverse lifestyle needs.
- » Streamline housing application processes to ease the process of finding and keeping housing.
- » In addition to providing emergency services, provide pathways out of homelessness for individuals that address a range of underlying causes.

STRATEGIES

SUPPORTIVE SERVICES

The priorities that are **bolded** delineate the strategies that were identified as being of highest priority to the attendees of the Master Plan for Aging Forum held in September 2019. For more specific concepts (ideas on policies, services, projects, and tools) relating to these strategies, see [page 67](#).

HOLISTIC SERVICES

- » **Develop service delivery systems that are coordinated, integrated, and easy to access.**
- » Provide services that consider the whole person — their background, experiences, preferences — and meet individual needs.
- » Support collaboration across sectors and between service providers and self-organized communities.
- » Expand and train a workforce that matches the growing need to serve an aging population.

LONG-TERM CARE

- » **Provide accessible and affordable channels for financing and saving for long-term care.**
- » Incentivize planning and saving for long-term care.

CAREGIVING

- » **Provide supports that alleviate the financial demands of caregiving.**
- » Expand the pool of qualified caregivers so people can have a variety of care options.

STRATEGIES

SOCIAL AND EMOTIONAL WELL-BEING

The priorities that are **bolded** delineate the strategies that were identified as being of highest priority to the attendees of the Master Plan for Aging Forum held in September 2019. For more specific concepts (ideas on policies, services, projects, and tools) relating to these strategies, see [page 107](#).

**CELEBRATING
AGING**

- » **Promote an aging-positive public narrative.**
- » Support new and existing channels that generate peer-to-peer community building.
- » Create opportunities for increased intergenerational connections.

**PLANNING FOR
AGING**

- » **Make planning for aging an integrated part of Californians' lives.**
- » Create resources for families and loved ones to have conversations on aging.

CAREGIVING

- » **Provide supports that alleviate the physical and emotional demands of caregiving.**

**JOB/VOLUNTEER
OPPORTUNITIES**

- » **Remove barriers and increase incentives that allow people to participate in the workforce longer.**
 - » Help older adults in transferring existing skills or learning new skills, that can be used in their everyday lives.
 - » Build pathways for older adults and people with disabilities to access job and volunteer opportunities.
-

STRATEGIC RECOMMENDATIONS

support adults planning for

How might we provide coordinated care and holistic support for older adults?

INSIGHT:

While some people need specific services to meet specific needs, others have a broader array of needs that are best addressed in a coordinated and holistic way.

"[Through Age Well], we have health and wellness programs, we have lectures, we bring in resources to help seniors with their finances. We have legal advice. So we have a whole array."

— Shirley Witt, Age Well
(Orange County, Suburban)

INSIGHT:

Some people are lucky enough

"We really think that using this service is really good because a lot of seniors like them, they really need kind of one station serving everything. Their daughter doesn't know English, and then can't drive."

— Tian Jun & Quan Xia, Older Adults, via
Joyce Chan, Hong Fook Center
(Alameda County, Urban)

"[With MediCare] they only offer you 100 days, then you have to pay for it out of your pocket. You're talking anywhere from \$3,500 to \$6,000, depending on where you place them for 24-hour care. It is very expensive and it is definitely bankrupting families! My aunt gave up her time and said I'll take care of it. Somebody had to give up their job, to take care of the family, because that was cheaper than coming up with this large sum of money."

— Natalie Franks, Acacia Adult Day Services (Orange County, Suburban)

"When I was working, at one time they had offered us long-term insurance for myself or a parent. And I turned it down. I think 'God, I should've done it' because I could've used it now."

— Rosalinda Cruz, Older Adult
(Kern County, Rural)

"I'm supposed to know how to die. But I skipped class."

— Ed Frakes, Older Adult
(Alameda County, Urban)



STRATEGIES:

Through this process, 28 strategies, or high-level recommendations, have been developed for the state of California to move toward. While the tactical solutions may change depending on need, feasibility, and time, the strategies are designed to remain constant and serve as a 'north star' for the Master Plan for Aging. Within each strategy, there are a range of concepts that can give inspiration for advancing the strategy.

CONCEPTS:

For each strategy, a range of ideas for policies, services, projects and tools were generated for advancing that strategy. They are ideas that lots of different stakeholders can see themselves in.

» **POLICIES**

Policies are specific legislative actions and a way to implement strategies at the federal, state, and/or local level. Policies should advance strategy and also align with/not impede the practical implementation of services and projects.

» **SERVICES AND PROJECTS**

Services and projects are the programs that directly impact older adults and people with disabilities. These can be programs via the government (e.g., Social Security), non-profits (e.g., meal delivery services), or private sector companies (e.g., assisted living homes and affordable housing projects).

» **TOOLS**

Tools are tangible products that can help advance strategy by supporting policies, services, and projects. Tools include things like apps, resource guides, and checklists.

SPOTLIGHTS:

Within each strategy, we've also included examples to "spotlight" existing efforts in California and around the country, and give tangible examples of policies, services, projects, and tools that could advance the overall strategy. These are just some of the examples that surfaced during research and do not include many other efforts that may be underway.

PHYSICAL ENVIRONMENT

STRATEGIES

INSIGHTS

NEIGHBORHOOD

- » The physical places older adults and people with disabilities live in matter. They can be supportive, providing safe and easy access to food, transportation, and health care and encouraging social interactions; or they can be withering, limiting their mobility, social connectivity, and overall well-being.
 - » Living close to major polluters can affect everyone's health, but older adults and people with disabilities are particularly vulnerable to the health implications.
-

TRANSPORTATION

- » The well-being of older adults and people with disabilities can become compromised when they are not able to access basic needs and amenities due to a lack of transportation options that are safe, reliable, flexible, and/or affordable.
 - » When mobility is lost or reduced for older adults and people with disabilities, there is also a profound loss of their independence.
-

HOUSING

- » The need for high quality, accessible, and affordable housing is dire: those that have it struggle to keep it; those that don't have it search and wait for years.
- » Navigating confusing housing rules and lengthy processes is so arduous that even social service providers have difficulty.
- » Homelessness is not solved simply by providing a roof over one's head, though it is a good place to start.



NEIGHBORHOOD

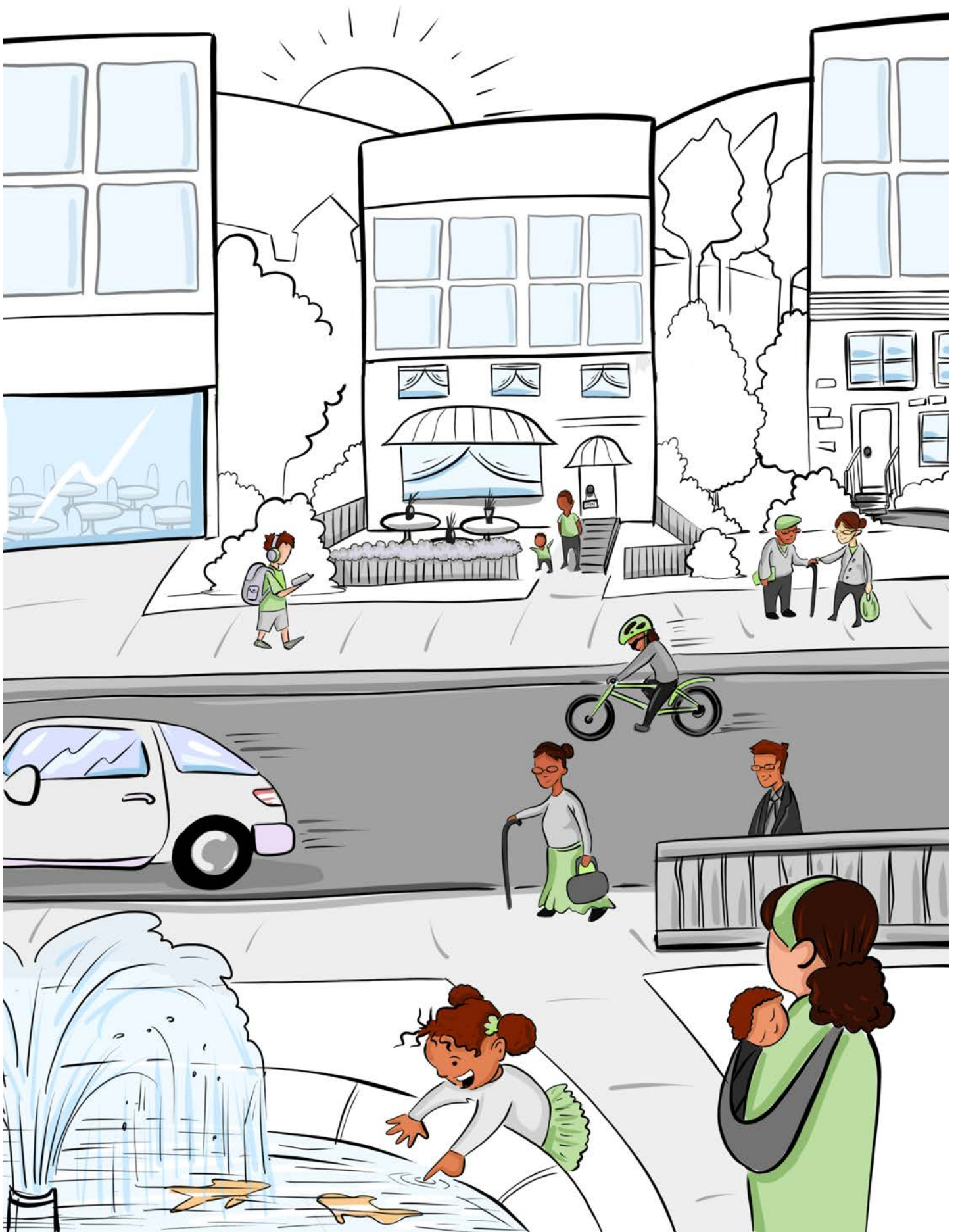
Design for mixed-age, mixed-ability neighborhoods with amenities that meet people's physical, social, and emotional needs.

Neighborhood design can play a big role in an individual's quality of life. A well-designed neighborhood can help meet basic needs, make everyday tasks easier to accomplish, increase physical activity, and promote social interactions. Not only do great neighborhoods provide immediate benefits, but when designed to accommodate all ages and ability levels, they can also mitigate future challenges around physical health and nutrition, mobility, and social and emotional well-being.

“

On days when I don't go to Hong Fook, I stay home. When I go downstairs to walk around, I meet with the housing staff in the office to say 'good morning.' I say it in my language, and they say it back in my language.”

— Older Adult (Alameda County)



CONCEPTS

POLICIES:

» ZONING FOR MIXED-USE, PEDESTRIAN-FRIENDLY NEIGHBORHOODS

Creation and/or better enforcement of zoning regulations that permit a range of programmatic uses in close proximity to each other — i.e., housing, workplaces, and essential amenities like doctors offices, grocery stores, and banks — thereby lessening one's reliance on automobile transportation. These regulations should also reduce conditions that prevent walkability such as minimum parking requirements, large building setbacks, and curb cuts.

» ADA-ACCESSIBLE STREETS

Streets and sidewalks that meet accessibility standards for older adults and people with disabilities. This may entail widening sidewalks, providing seating periodically, planting shade trees, ensuring smooth curb cuts, and maintaining an unobstructed pathway at all times.

» ZONING FOR SMALLER LONG-TERM CARE FACILITIES

Amended zoning regulations that allow for smaller long-term care facilities to be built in a variety of locations and land-use zones.

» CORPORATE LINKAGE FEES

Required fees that cities can charge new developments to account for the increased demand for governmental services, like affordable housing or streetscaping. A commercial linkage fee applies to new commercial and industrial businesses while residential linkage fees apply to new market-rate housing developments. Both can help fund governmental services that are needed as a result of that development.

SERVICES AND PROJECTS:

» REPURPOSED SPACES

Redeveloped unused or underutilized spaces — old shopping malls, bank buildings, military bases, warehouses — for mixed-use programming that includes senior housing or other amenities for use by older adults.

» CENTRALLY-LOCATED SENIOR HOUSING

Housing for older adults that is located in proximity to basic amenities such as pharmacies, grocery stores, and open spaces.



Senior Arts Colonies | Copyright: Sibylle Allgaier

SPOTLIGHTS:

» **SENIOR ARTS COLONIES**

A series of California housing projects that combine affordable housing for older adults with an array of arts amenities, such as theaters, art galleries, and dance studios. The developer, Meta Housing, has co-funded the project with Burbank, North Hollywood, and Long Beach and several community development agencies, including an arts programming group called Engage.

» **ZEPHYR — SUPPORTIVE HOUSING PROJECT**

Zephyr is a supportive housing project for 84 veterans that was built on the site of what used to be a Motel 6 in the Grantville neighborhood in San Diego, California. By adapting an old motel, the developer was able to cut down the cost of construction. A second building on the property was once a Denny's restaurant.

NEIGHBORHOOD

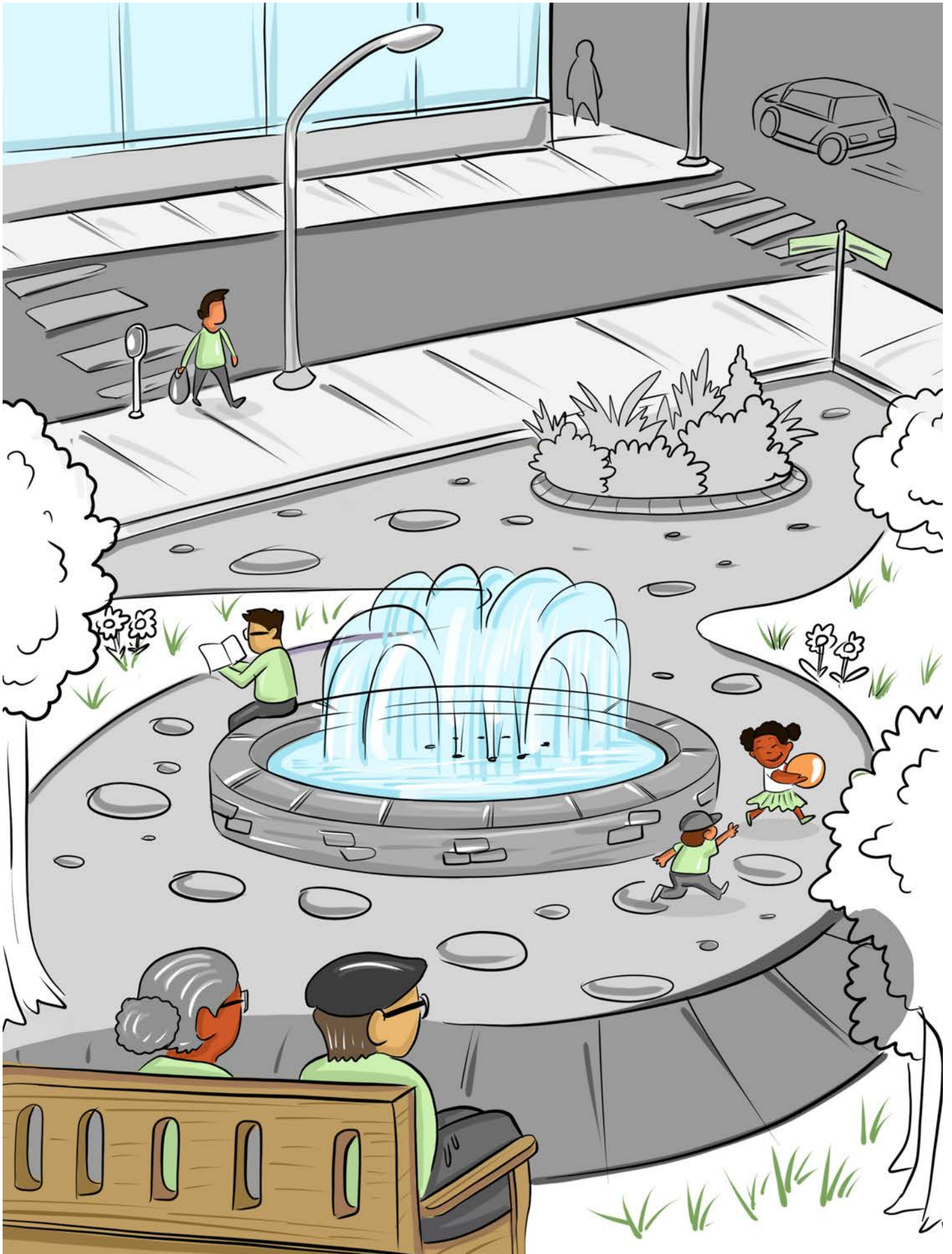
Design intergenerational spaces and communities.

Taking an intergenerational approach to the design of spaces and communities can have long-lasting and mutual benefits for older adults, people with disabilities, youth, and other age groups, particularly since issues such as housing, food security, and social support impact people of all ages. When designing spaces and communities, considering the reciprocity, interdependence, and social inclusion among different age groups can lead to built-in social supports for each population, a more empathetic outlook overall, and long-term sustainability of places, programs, and tools.

“

[The owner of the quilt shop] said we have a youth class, a youth quilting class. I said, that would be perfect. So I sat here with all these little girls and the most wonderful teacher in the world and she taught me to quilt and I was hooked.”

— Older Adult (Kern County)



CONCEPTS

POLICIES:

» **CO-LOCATED SERVICES FOR OLDER ADULTS AND CHILDREN**

The provision of services for children, such as day care or afterschool programming, at locations that also provide support and other offerings for older adults, such as care facilities or senior centers.

» **INTERGENERATIONAL COMMUNITY GARDENING**

Intergenerational community gardens that use food to bring together people of different ages. Gardening not only allows people to be active and have access to healthy food, but has proven to be therapeutic for older adults with dementia.

» **INTERGENERATIONAL HOUSING**

Housing designed for older adults to live alongside younger people. This could look like senior housing on college campuses, younger individuals or families renting out spare rooms to older adults, or multi-unit apartment buildings for older adults with younger “resident assistants” who provide support and companionship.



H.O.M.E Housing Opportunities and Maintenance for the Elderly | Copyright: H.O.M.E

SPOTLIGHTS:

» **INTERGENERATIONAL HOUSING IN CHICAGO**

H.O.M.E is an organization in Chicago that helps low-income older adults to live independently and provides intergenerational housing, home repair services, a shopping bus, moving assistance, and caring volunteers. H.O.M.E's intergenerational housing features not only has students from local universities, but also young adults working as resident assistants, and families with children.

» **INTERGENERATIONAL COMMUNITY GARDEN IN VERMONT**

Newport, Vermont is a remote community with a high number of people 65 and older, high unemployment, and a lack of fresh food. Many older adults grew up on farms and young people were interested in learning about that experience so a community garden was created. Younger people do the digging and weeding, while older people grow the seeds in their homes and instruct the kids on how to care for the plants.

NEIGHBORHOOD

Prioritize health and safety in both existing communities and in the design of new developments.

Prioritizing health and safety requires two streams of effort, both of which need to happen in tandem with one another. The first is restricting conditions that negatively impact health and safety, whether it be certain land uses or even toxic outputs. While environmental regulations provide some protection for the health and well-being of community members, they are often not stringent enough or enforced. The second stream is providing amenities that offset toxic conditions and support the health and safety of residents in a community.

“

I was in the medical field, and the doctors said, they never saw so much strep throat, so many sinus problems as we have here. And the problem is the damage is already done because the dust is already here. It's covering all our ground...we still have really unhealthy air when the wind blows...we've all been drinking the water that's causing cancer in us for generations.”

— Older Adult (Kern County)



CONCEPTS

POLICIES:

» IMPROVED POLICE RESPONSE TIMES

Increased staffing, funding, and technology opportunities to decrease average police response times, particularly in rural areas.

» STRICTER ENVIRONMENTAL REGULATIONS

Strict enforcement of environmental regulations, including the California Environmental Quality Act and the National Environmental Policy Act, particularly in areas with high populations of older adults.

» ACCESSIBLE OUTDOOR AND GREEN SPACES

Public outdoor and green spaces designed or updated to be physically accessible for older adults and people with disabilities.

» PROVISIONS FOR OUTDOOR SPACE

Requirements for new developments of a certain size to include an accessible outdoor space.

SERVICES AND PROJECTS:

» NEIGHBORHOOD SAFETY PROGRAMS

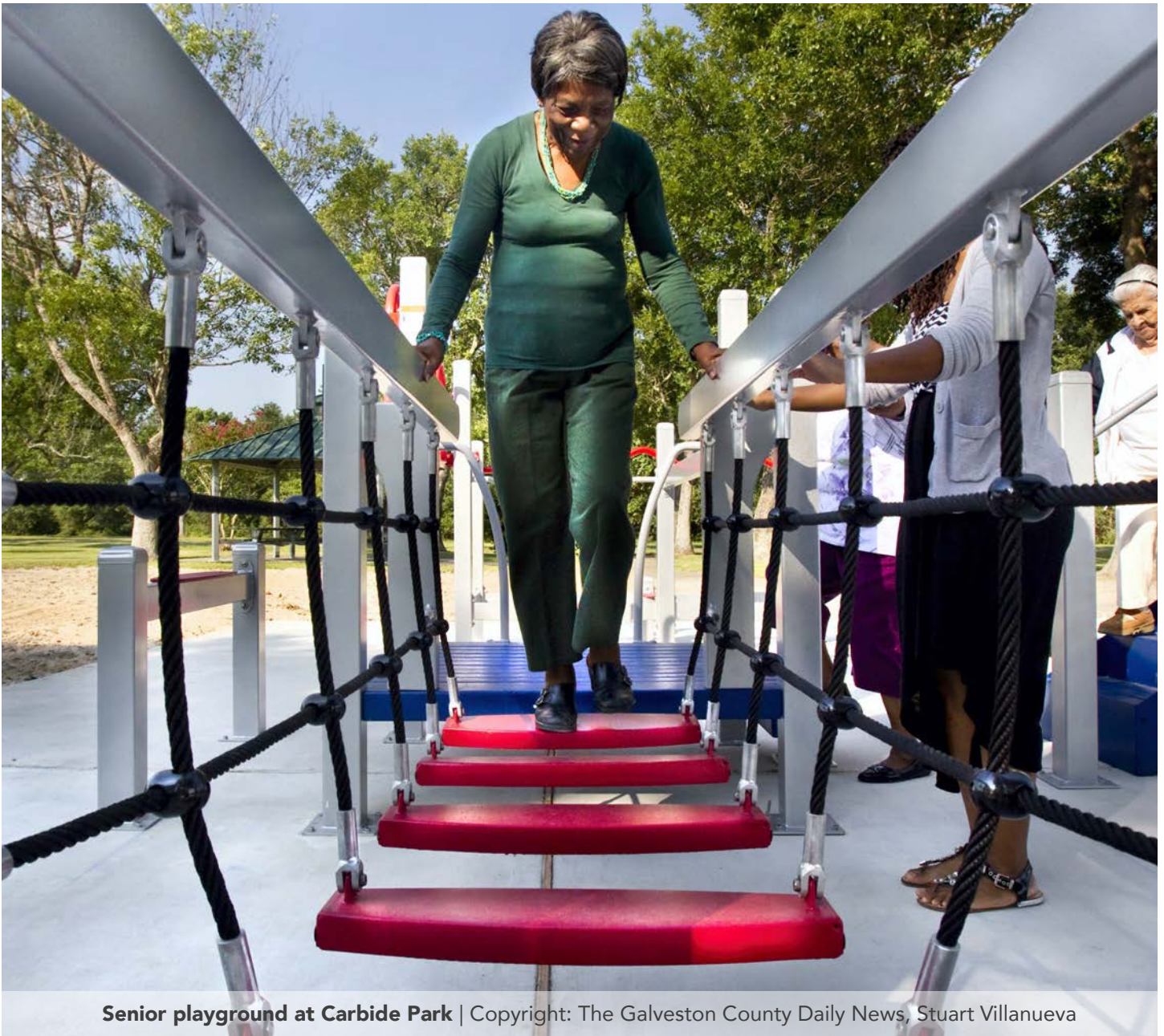
Neighborhood-based programs such as a “neighborhood watch” that bring together residents, business owners, and law enforcement officials to deter crime and make communities safer.

» WALKING CLUBS

Self-organized groups that walk with older adults so they can run errands, get exercise, or socialize outside while feeling safe.

» COMMUNITY GARDENS

Shared gardening spaces for people to grow healthy food and socialize.



Senior playground at Carbide Park | Copyright: The Galveston County Daily News, Stuart Villanueva

SPOTLIGHT:

» **PLAYGROUND FOR OLDER ADULTS IN TEXAS**

Galveston County spent \$36,000 for special equipment at Carbide Park in La Marque, Texas to create a playground targeting the exercise needs of older residents. The playground is the first of its kind in Texas with a “motion wellness system” for older adults. The exercises are set up to help seniors maintain their coordination and balance, but the county’s other motive was also to see older adults gathering and making social connections, as well.

NEIGHBORHOOD

Include the voices of older adults and people with disabilities in planning and development processes.

Community development projects can directly impact and have huge implications for older adults and people with disabilities. However they are not always given a voice, even when they are the primary users! It is imperative that older adults and people with disabilities are included in planning processes and decision-making. Not only will this allow their needs to be met, but designing for the most vulnerable populations often results in better designs for all.

“

It would seem very prudent to the property owners to consider the nearby seniors who are retired and have their pensions. They have means, they're looking for places to go — restaurants, shopping, entertainment. They would really frequent this place a lot.”

— Kathleen Lui, Older Adult (Orange County)



CONCEPTS

POLICIES:

» **REPRESENTATION REQUIREMENTS**

Required representation by older adults and people with disabilities on cities' housing and urban development committees.

» **NEW DEVELOPMENT/TRANSIT PROXIMITY REQUIREMENTS**

Consideration of the location of senior housing and concentrations of older adults when planning or revising transit lines.

SERVICES AND PROJECTS:

» **GET-OUT-THE-VOTE TO SENIORS**

Programs that continue to increase awareness of issues and make it easier for older adults and people with disabilities, particularly in low-income areas, to vote in local, state, and national elections through early-voting assistance and transportation assistance on voting days.

CITY OF BURBANK SENIOR RESOURCE GUIDE

2019
2020

CONNECTING SENIORS TO OUR COMMUNITY



Burbank Senior Citizen Board | Copyright: City of Burbank

SPOTLIGHT:

» **BURBANK SENIOR CITIZEN BOARD**

The Senior Citizen Board serves as an advisory board to the City of Burbank. Among other duties, the Board serves as a liaison between local organizations and governmental agencies which work with the aged. They engage in consultation with local groups on the needs of the aged, evaluate available resources, and advise in community planning regarding the expansion of existing facilities and development of new facility services.

TRANSPORTATION

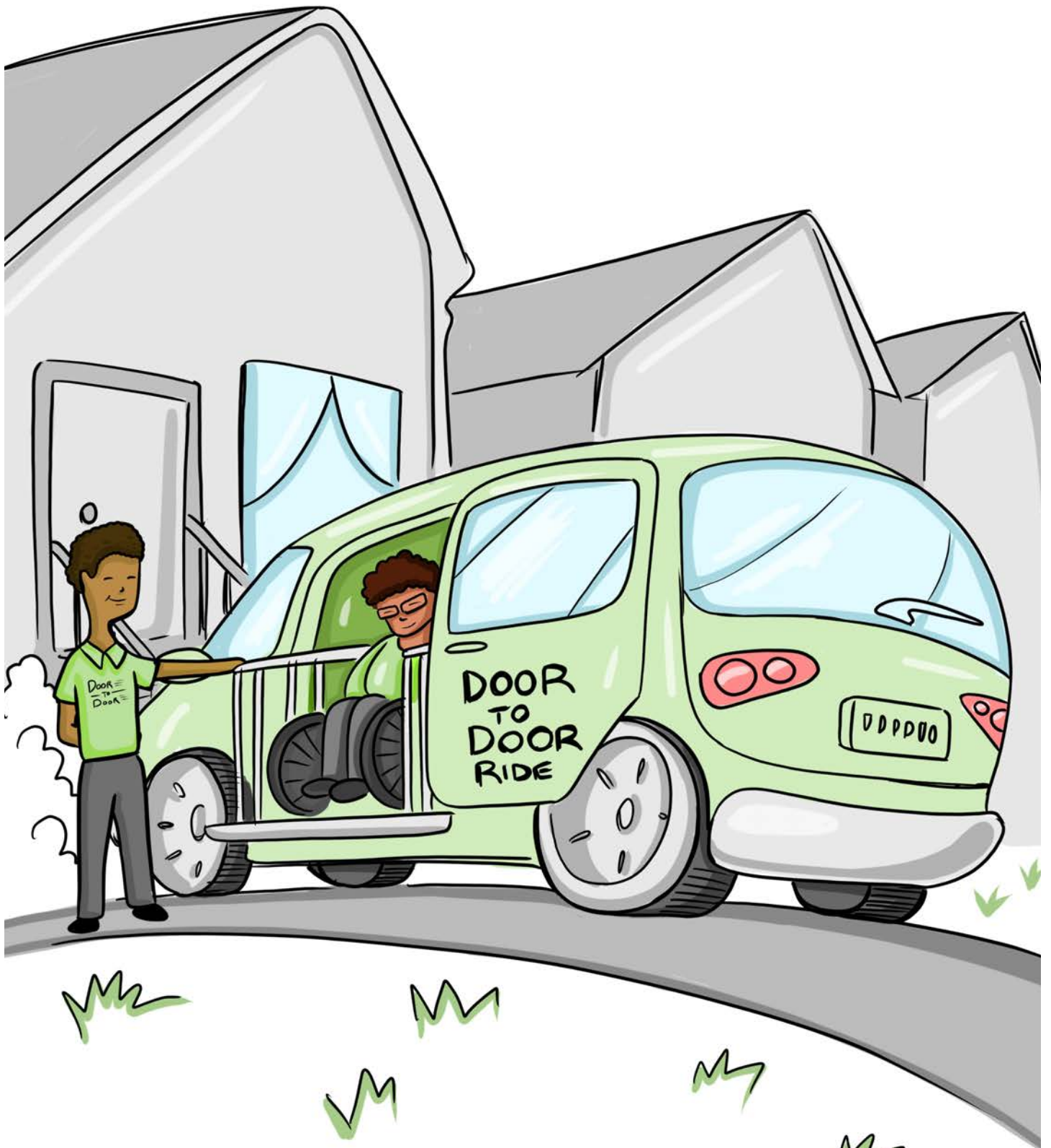
Make travel convenient and affordable for older adults and people with disabilities.

Transportation is the connective link between older adults and the things they need to survive: whether it's going to grocery stores, medical appointments, or even visiting family and friends. When getting around is not affordable and/or convenient, it deters older adults and people with disabilities from fully thriving and sometimes even traps them in their homes and immediate surroundings. On the other hand, when travel is convenient and affordable, it can instill a sense of independence, help older adults and people with disabilities easily access the things they need, and even encourages greater mobility, thereby positively impacting their physical health, as well.

“

I was checking the other day that bus in advance you can call, they will take you from this place, set up a date, a time. [It's \$4 per trip]. You can not afford it. It's not cheap for me. \$8 roundtrip, for \$8 I can buy breakfast for two days.”

— Carmen Gueretta, Older Adult (Alameda County)



CONCEPTS

POLICIES:

» **FREE/REDUCE-PRICE TRANSIT FARES IN ALL CITIES**

Free or significantly reduced public transportation for free or at a significantly reduced price for people 65 and older.

» **TAXI OR RIDESHARE VOUCHERS**

Partnerships with rideshare and taxi companies to provide low-income older adults with vouchers for free or reduce-price taxi and rideshare rides.

» **EXPANDED PUBLIC TRANSIT**

Well-connected, frequent, and efficient public transportation systems across cities, regions, and the state.

SERVICES AND PROJECTS:

» **ALL-DAY, SAME-DAY PARATRANSIT**

Paratransit services that have expanded hours and require less advance planning by the rider.

» **AFFORDABLE RIDES TO KEY DESTINATIONS**

Free or low-cost shuttles to and from places that provide essential needs as well as recreational opportunities: health care clinics and hospitals, supermarkets, movie theaters, etc. Shuttles could be provided by one primary agency or could be offered by the destination.

» **VOLUNTEER DRIVER PROGRAM**

Organized system of able-bodied younger and older adults willing to provide rides free of charge to other older adults and people with disabilities.

TOOLS:

» **VOLUNTEER RIDESHARE APP**

An app that connects older adults to drivers willing to provide a set number of pro-bono rides each month.



Paratransit service | Copyright: Smart Cities World

SPOTLIGHT:

» **GRAND RAPIDS, MICHIGAN ON-DEMAND PARATRANSIT**

Rapid On Demand is a curb-to-curb rideshare service operated in partnership with an app-based rideshare company called Via. During the six-month pilot program, the service allows paratransit users to request rideshare vans to take them where they need to go, when they need to go. Via's technology identifies riders traveling in the same general direction and matches them with vehicles going that way.

TRANSPORTATION

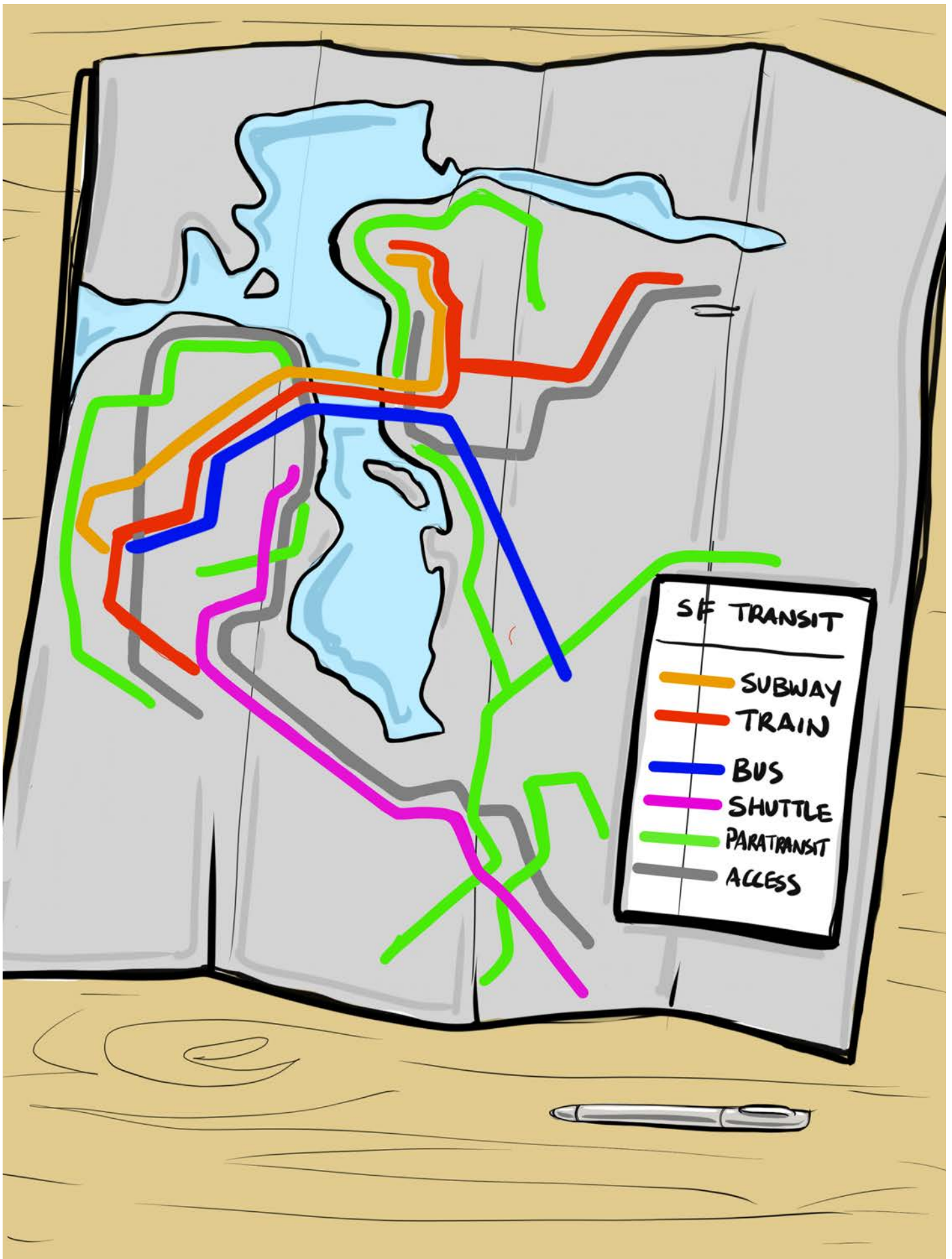
Develop transportation options that can meet a variety of accessibility needs.

Depending on the context one lives in, getting around can be challenging, but it becomes even more challenging when there is a disability that needs to be considered. Transportation options are not always well-suited to offer the accommodations a person needs, whether it be extra time, properly designed streets and vehicles, door-to-door service, or even having operators and workers that can respond with sensitivity. By developing highly accessible transportation options, not only can those with accessibility needs get around more easily, but the considerations tend to improve the experience for all people, whether it's a mother pushing a stroller or a person carrying bags of groceries.

“

I can only walk about a block. I have to stop and rest. If I walk to the bus stop, it's about eight blocks from here, so I have to stop about eight times before I get there.”

— Harold Watkins, Older Adult (Kern County)



CONCEPTS

POLICIES:

» EXPANDED PUBLIC TRANSIT

Expanded public transit that is well-connected, frequent, and efficient across cities, regions, and the state.

» EXPANDED RURAL DEMAND-RESPONSE SERVICE AREA.

Expanded accessible transportation service area that must currently be provided within three-quarters miles of a fixed route service area, as per ADA guidelines.

» ACCESSIBILITY MODIFICATIONS TO PUBLIC TRANSIT

Design modifications to new and renovated buses, trains, and other public vehicles that improve mobility for older adults and people with disabilities.

SERVICES AND PROJECTS:

» EXPANDED DOOR-THROUGH-DOOR SERVICES

A hands-on approach to providing transportation that offers additional assistance and accompaniment to older adults and people with disabilities throughout the duration of a trip.

» MOBILE SERVICES

Mobile units or delivery services that bring essentials to people who are homebound. This could include at-home medical or dental services, food delivery, or the delivery of other essential household items.

» TRAINING FOR TRANSIT OPERATORS

Training for bus drivers and other transit operators on how to accommodate older adults and people with disabilities.



PDX WAV | Copyright: Portland Bureau of Transportation

SPOTLIGHTS:

» **FIRST TRANSIT — LYFT PARTNERSHIP FOR ACCESSIBLE RIDES**

Launched in San Francisco and Los Angeles, First Transit and Lyft rideshare launched a pilot that allows individuals who use a fixed-frame or non-collapsible wheelchair to request a Wheelchair Accessible Vehicle (WAV) with a ramp.

» **PDX WAV**

The Portland Bureau of Transportation launched a program that makes it easier for people with disabilities to hail rides on demand. PDX WAV is dispatch service that connects callers with wheelchair accessible taxis, Ubers or Lyfts located within a 30-minute radius.

TRANSPORTATION

Coordinate transportation offerings across public agencies, social service providers, and private entities in order to make them easily navigable.

The experience of getting around for older adults and people with disabilities differs dramatically depending on their physical context and even life circumstances. Those that live in rural areas with limited public transportation may rely more heavily on social service providers and private entities. Those in more urban areas may have access to public transportation, but might also have to rely on other transportation options to fill gaps in service. Given this complexity of transportation offerings, there is often confusion around what options are available, what subsidies are available, and how one can best access the different options. Through coordination between various entities, efforts can become less duplicative and easier to navigate for older adults and people with disabilities.

“

The bus used to take me all the way here to Daly City. So I said this is not bad, a bus from Summerdale. The Ready Wheels were going to pick me up there, but the waiting time period in between one and the other one, you never can predict that because of the traffic, because of everything. I was waiting there and two times a guy came and says ‘give me your purse.’”

— Carmen Gueretta, Older Adult (Alameda County)



CONCEPTS

POLICIES:

» **EXPANDED PARATRANSIT SERVICE CORRIDORS**

In rural areas, expand the American's With Disabilities Act (ADA) corridor in which guaranteed paratransit services are provided in addition to fixed-route service. Currently service is required within a three-quarters of a mile corridor of the fixed route.

SERVICES AND PROJECTS:

» **CENTRALIZED DISPATCH SERVICE**

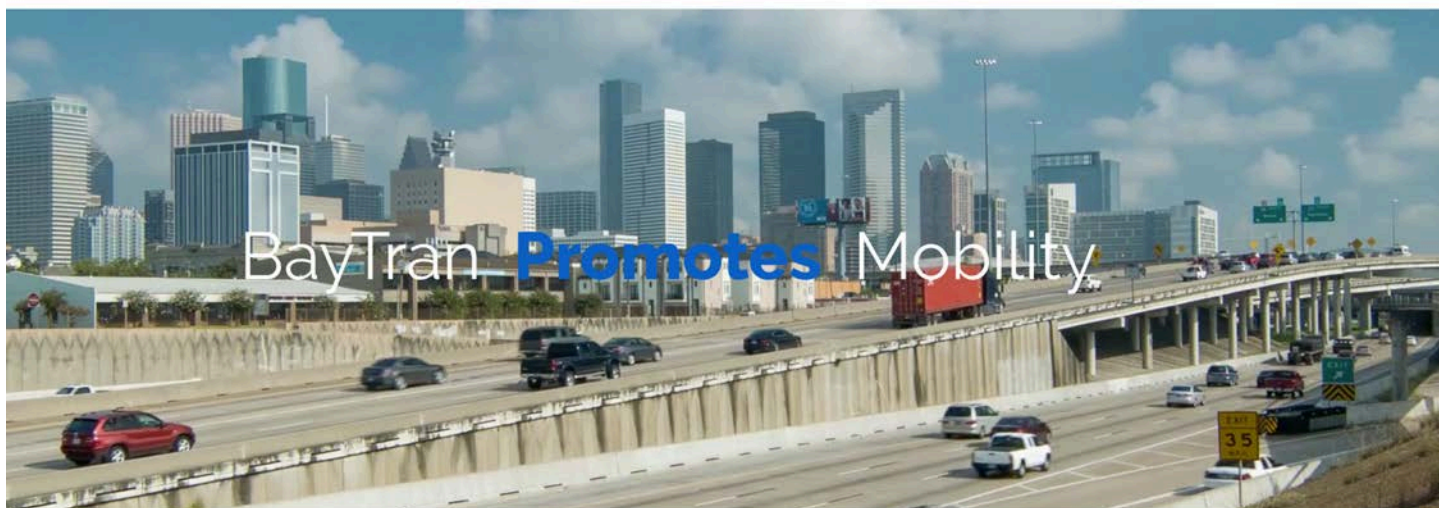
A single phone number in a given area for people trying to access any number of transportation services.

» **'DAILY ROUTINE ROUTES'**

Regular circuit routes that allow individuals to access key destinations — i.e., the post office, the bank, the grocery store, the library — using one transportation service.

» **SHARED ACCESSIBLE VEHICLES**

A system to share accessible vehicles between organizations within an area, so that any group can provide accessible transportation to and from events or destinations.



The Bay Area Houston Transportation Partnership serves as the transportation management organization facilitating Regional Mobility Management for employers, government agencies and residents in the Bay Area Transportation Partnership Tri-County regional service area.

BayTran Houston Transportation Partnership | Copyright: BayTran Houston Transportation Partnership

SPOTLIGHT:

» **BAYTRAN HOUSTON TRANSPORTATION PARTNERSHIP**

The Bay Area Houston Transportation Partnership supports and advocates for mobility in the Tri-County regional service area. It serves as the transportation management organization facilitating regional mobility management for employers, government agencies, and residents.

HOUSING

Remove financial and regulatory barriers that prevent older adults and people with disabilities from acquiring and keeping their housing.

As the cost of housing in California continues to skyrocket, it becomes increasingly difficult for older adults and people with disabilities to acquire and maintain their housing. On the one hand, financial circumstances are a big impediment, so there need to be tactics that directly address that piece. On the other hand, there are also a number of regulatory barriers that can be removed or eased to increase the availability of affordable housing and make it easier for older adults and people with disabilities to find and stay in their homes.

“

I was here before I got my Section 8. Sometimes you have to wait a long time. If you do something wrong, you can lose your voucher...They never tell you the rules upfront. I called them trying to get a transfer [for housing], somewhere cheaper so I didn't have to be responsible for two extra bedrooms...I didn't go through them, I stayed here and ate the rent increase.”

— Kathy Garner, Older Adult (Kern County)



CONCEPTS

POLICIES:

» **FIXED INCOMES AND BENEFITS ADJUSTED FOR A LIVING INCOME**

Living income provided to all older adults and people with disabilities, whether through Social Security benefits, Supplemental Security Income and/or Universal Basic Income.

» **REAL ESTATE TAX REBATES AND EXEMPTIONS**

Provide tax exemptions and rebates for individuals 65 and older and people with disabilities who have lived in their rental or owned homes for a certain amount of time.

» **POOR CREDIT ALLOWANCES**

Waivers to adjust poor credit, remove violations, or waive the credit check during the housing application process for older adults and people with disabilities.

SERVICES AND PROJECTS:

» **LANDLORD INCENTIVES**

Incentives to landlords (i.e., tax exemptions) to participate in Section 8 and accept low-income tenants, especially in rural areas where Section 8 options can be extremely limited.

» **REDUCED RENTS FOR PROPERTY VOLUNTEERS**

Discounts on rent provided by landlords in exchange for helping with property maintenance and other property-related tasks.

CITY OF PLANO PROPERTY TAX EXEMPTIONS

IF YOU'RE A
HOMEOWNER
IN PLANO,
YOU RECEIVE A

20% HOMESTEAD EXEMPTION

Anyone who owns a home in Plano can use a homestead exemption on one property.

APPAISED VALUE	\$379,629	APPAISED VALUE	\$379,629
HOMESTEAD EXEMPTION	x 20%	TOTAL DEDUCTION	- \$75,926
TOTAL DEDUCTION	= \$75,926	NEW TAXABLE PROPERTY VALUE	= \$303,703

IF YOU'RE A
SENIOR OR HAVE A
DISABILITY,
YOU RECEIVE
AN ADDITIONAL

\$40,000 SENIOR/DISABILITY EXEMPTION

Homeowners who are 65 and over, or disabled, can get an additional property tax exemption.

TAXABLE PROPERTY VALUE WITH HOMESTEAD EXEMPTION	\$303,703
SENIOR/DISABILITY EXEMPTION	- \$40,000
TAXABLE HOME VALUE	= \$263,703

IF YOU'RE
65 YEARS
& OVER, OR DISABLED,
YOU ALSO RECEIVE

AGE 65 AND OLDER OR DISABLED TAX FREEZE

Homeowners 65 and over, or disabled, can apply for a tax freeze on their City of Plano taxes. Once frozen, taxes on that home cannot increase as long as you own and live in it. The taxes on your home can go below the tax freeze, but will never go higher as long as you live in that home unless you improve your home. Improvements are things like adding a garage or a bedroom. Your tax freeze will adjust to reflect improvements.



Texas Homestead Tax Exemption | Copyright: City of Plano

SPOTLIGHT:

» TEXAS HOMESTEAD TAX EXEMPTION

The state of Texas allows individuals age 65 and older or disabled residence homestead owners to qualify for a \$10,000 homestead exemption for school district taxes, in addition to the \$25,000 exemption for all homeowners.

HOUSING

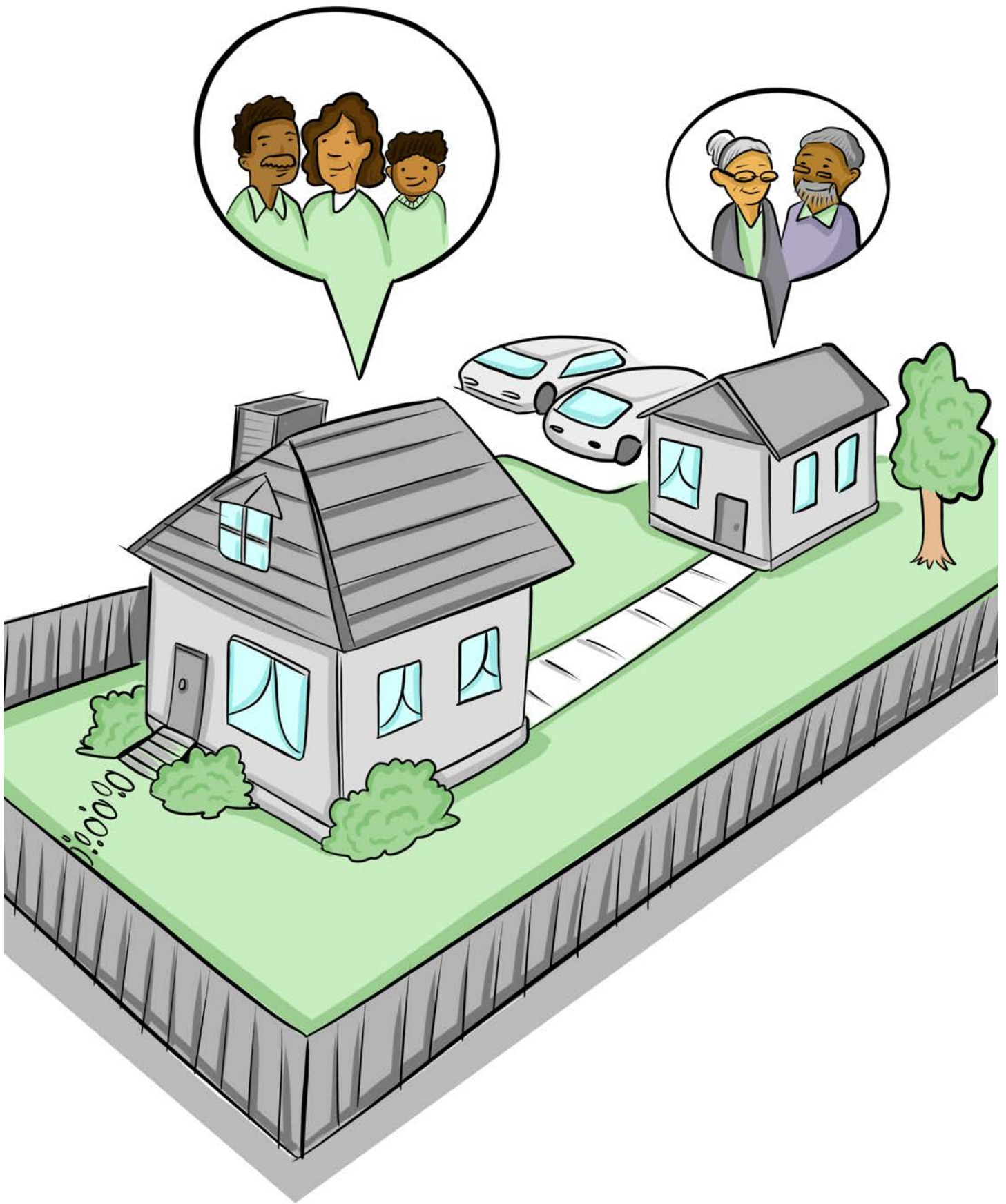
Make it easier to build a variety of housing types for diverse lifestyle needs.

The need for affordable housing continues to rise, however, the supply of affordable housing lags far behind demand. At the same time, people also need different types of housing at different points in their lives. One approach to balancing these disparities and needs is by making it easier to build a variety of housing types. This can be accomplished through incentivizing the creation of a greater supply of diverse housing types, but also by removing local regulatory barriers that might currently prohibit this diversity.

“

They need to get affordable housing. They don't have it around here. I mean this apartment that I have is supposed to be the lowest priced in Orange County and it's \$1,270 a month. And that is not reasonable. It's a no bedroom.”

— Donna Lynn, Older Adult (Orange County)



CONCEPTS

POLICIES:

» AFFORDABLE REQUIREMENT ORDINANCES

Ordinances that require that housing developments include a set amount of affordable units, either directly on-site or within a short radius of the site, in exchange for benefits such as the use of public funds, density bonuses, tax breaks, or expedited permitting.

» MIXED-USE DEVELOPMENT INCENTIVES

Tax credits and other means of incentives to developers to build mixed-use developments that include housing for older adults and people with disabilities, along with amenities they need and would enjoy, from health providers to places to shop.

» STREAMLINED BUILDING PROCESSES

Streamlined processes and lower fees for building or renovating affordable housing as a way to encourage increasing stock.

» ZONING FOR ACCESSORY DWELLING UNITS (ADU)

Loosen current zoning codes that prevent accessory dwelling units (secondary smaller dwelling on the same grounds as the primary home) and allow them to be developed, rented out, and occupied.

» VISITABLE HOUSING REQUIREMENTS AND INCENTIVES

Requirements for developers to include basic visitability standards (one no-step entry, doors with 32 inches of clear passageway, at least one accessible half-bathroom on the main floor) in all new home construction and/or incentives that encourage developers to apply the standards voluntarily.

SERVICES AND PROJECTS:

» CO-HOUSING

Communities of individual homes or apartments clustered around shared living, cooking, and dining spaces, thereby providing, privacy, opportunities for socialization, and mutual support.

» INCREASED TINY HOMES

As dwellings with a square footage typically between 100 square feet and 400 square feet, tiny homes provide a more affordable independent living option, and can be used as accessory dwelling units to regular single family homes or as infill on vacant lots.

» **HOME MODIFICATION PROGRAMS**

Free or low-cost programs that assist older adults and people with disabilities to make modifications to their homes, including wheelchair ramps, grab bars in bathrooms, widening doorways, stair lifts, walk-in tubs, and beyond.

TOOLS:

» **HOME SHARING DIGITAL TOOL/HOTLINE**

Matching service that connects older adults wanting affordable housing with people that have homes or rooms to share.

“

The housing crisis is so bad. I’ve put in maybe 40-45 applications, and so far I’ve heard from maybe 10, and they put me on the waiting list. The longest waiting list is 7 years. The shortest one is 2 years.”

— Jerome McIntosh, Older Adult (Alameda County)





Alycemates | Copyright: Alycemates

SPOTLIGHTS:

» **ALYCEMATES**

Alycemates is a free, full-service roommate finder for older adults. They list homes, find and interview potential roommates, conduct background checks, provide contracts, and even provide mediation and community building after move-in.

» **DETROIT TINY HOMES PROGRAM**

Cass Community Social Services is building 25 Tiny Homes in Detroit, Michigan for a range of residents (formerly homeless people, older adults, college students and a few Cass staff members). The residents will initially rent the homes, but then anyone who remains for seven years will be given the opportunity to own the home and property.

HOUSING

Streamline housing application processes to ease the process of finding and keeping housing.

Given the extreme shortage of affordable units, the process of applying and waiting for housing often feels like a game of chance. Not only that, there's very little about the process that is straightforward, transparent, and timely, adding to the barriers for older adults and people with disabilities to finding and keeping housing. While streamlining housing applications doesn't necessarily solve the housing shortage, it does reduce the time, financial burdens, and stress associated with searching for housing, both for the older adults and social service providers.

“

The loops that I had to hop through to get into that apartment...They had you go over here to get your info right here. A few days or weeks later, you had to go over to another city to get this information over there. Then you have to bring it over here to this third office, then the fourth office, I mean it was like running track!”

— Curtis Gamble, Older Adult (Orange County)



CONCEPTS

SERVICES AND PROJECTS: » HOUSING NAVIGATORS

Individuals trained to assist people every step of the way as they navigate, secure, and retain viable housing. This role could be incorporated into existing positions (i.e., case managers), or it could be an entirely new and separate role.

» HOUSING MEDIATION SERVICES

Readily known and available mediation and legal services for individuals to avoid unwanted relocation, displacement, or evictions. This could be provided by students at university law clinics or law firms as a pro-bono service.

» HOUSING FAIRS

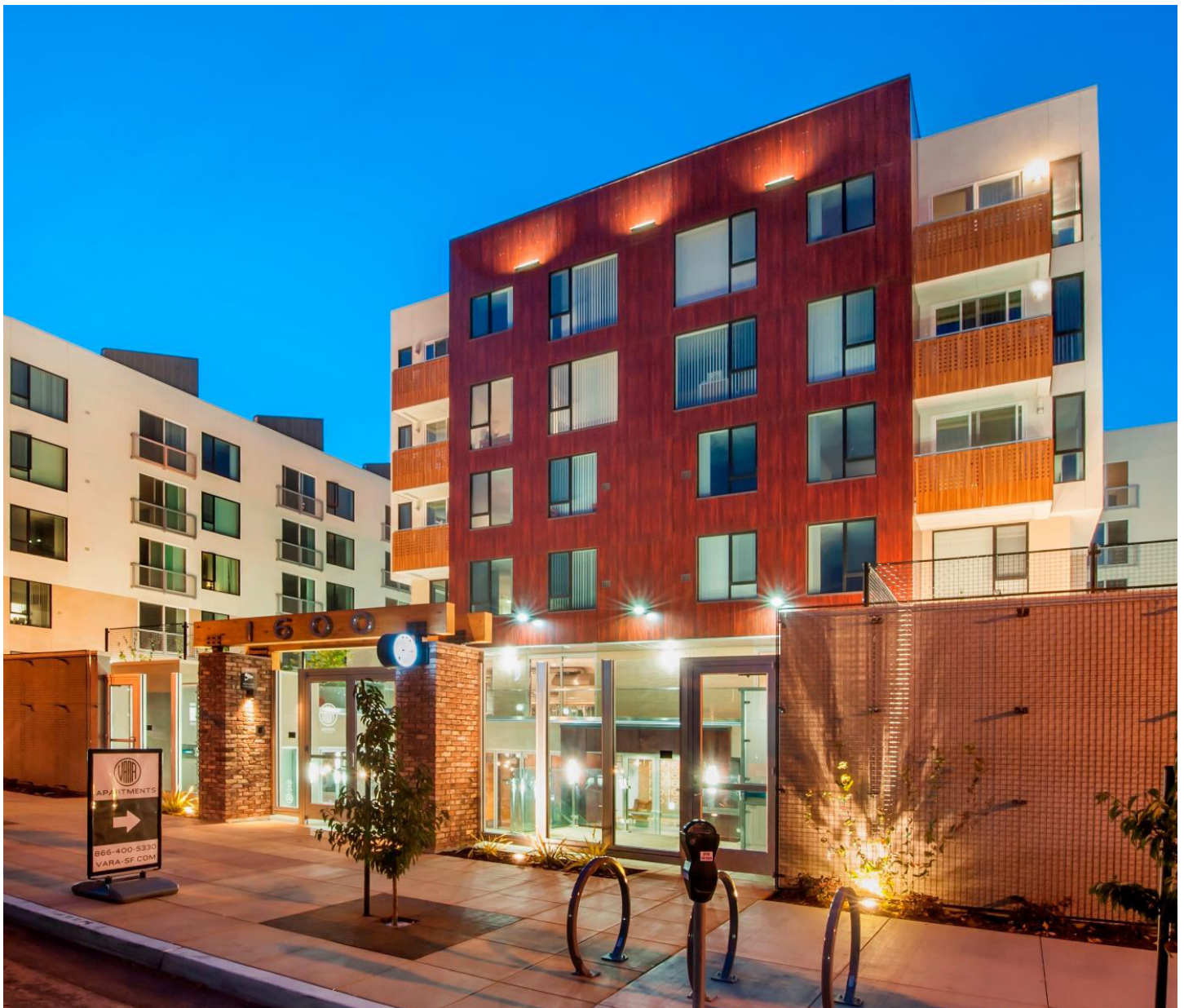
Events that provide information and support for navigating the housing application process. This could include workshops or one-on-one assistance for filling out paperwork; information on new housing developments; a space with computers, scanners, and printers for filling out applications; and shuttles to and from the fair for those needing transportation.

TOOLS: » UNIVERSAL HOUSING APPLICATION

A centralized website that clearly conveys the rules and steps involved with applying for housing, as well as a universal application that can be sent to multiple housing options with a single click.

» ONE-TIME CREDIT CHECK FEE

A one-time housing application fee that makes credit history available for multiple landlords rather than requiring a fee to be paid for each housing application.



DAHLIA, San Francisco Housing Portal | Copyright: DAHLIA, San Francisco Housing Portal

SPOTLIGHT:

» **DAHLIA, SAN FRANCISCO HOUSING PORTAL**

The web-based DAHLIA San Francisco Housing Portal, centralizes all affordable housing resources online and makes it easier to find and apply for affordable housing.

HOUSING

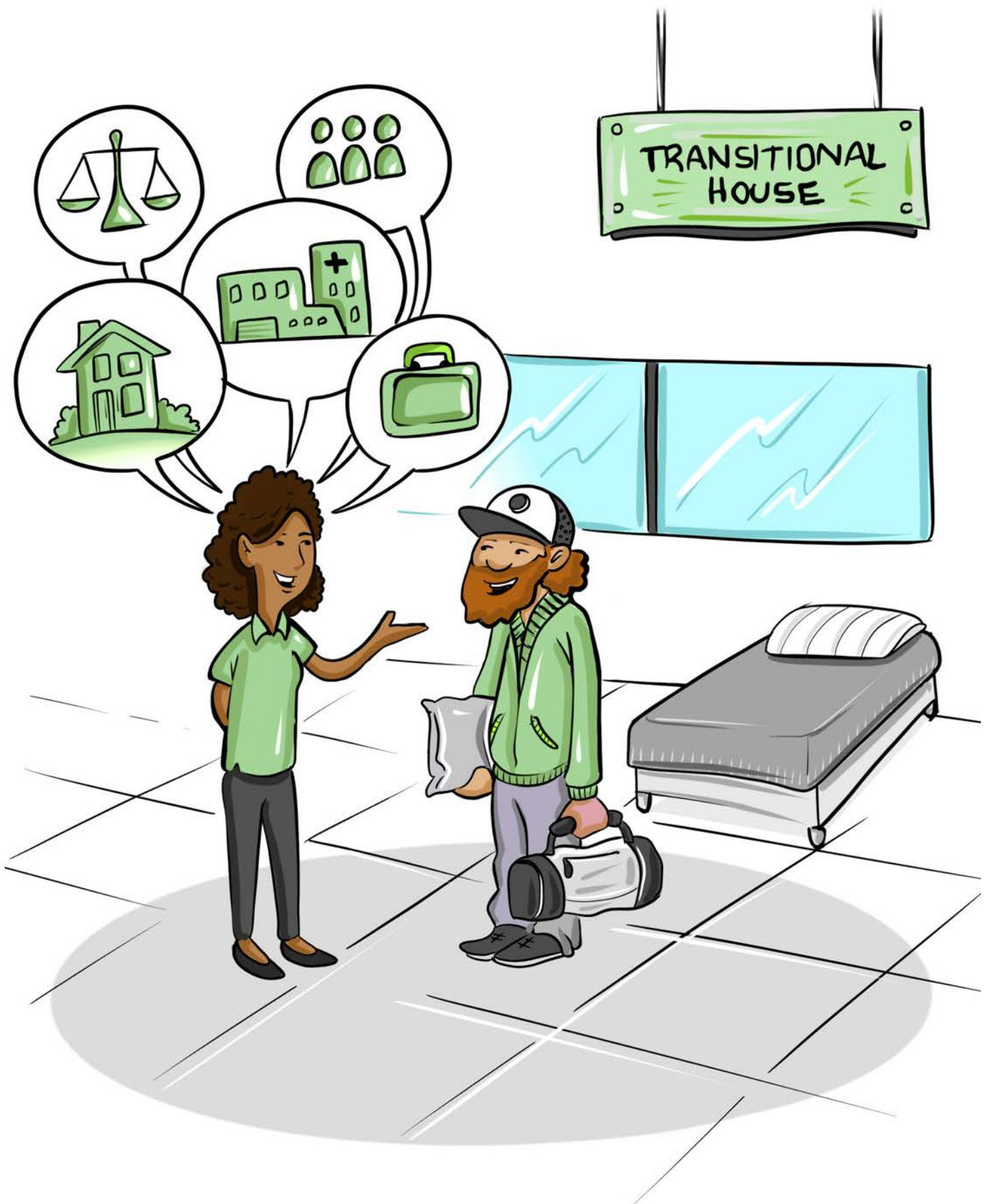
In addition to providing emergency services, provide pathways out of homelessness for individuals that address a range of underlying causes.

Homelessness among the older adult population in California is on the rise, in large part due to the housing affordability crisis. The reasons many become homeless, however, are more varied. Often there are underlying issues – mental health, substance abuse, or previous housing violations – that become barriers to maintaining stable housing. While there is an immediate need to provide emergency services, many additional services such as job training and placement, mental health counseling, and substance abuse counseling are needed to ensure that a person can get out of and not fall back into homelessness once they have received the initial support.

“

Everyone is just throwing money or throwing food [at homeless individuals]. When you put them into a shelter, that's great, but what happens after that? You know, there needs to be a transition out. That's the point of our program here.”

— Ruth Cho, H.I.S. House (Orange County)



CONCEPTS

SERVICES AND PROJECTS: » EXPANDED RAPID RE-HOUSING SERVICES

Service that quickly connects older adults and people with disabilities experiencing homelessness to permanent housing options, rental assistance opportunities, and targeted supportive services in order to limit their time experiencing homelessness and improve their chances of achieving housing stability.

» CAREGIVING IN SHELTERS

Caregiver support provided to older adults in homeless shelters similar to that provided by caregiving services—i.e., meals, health care / medicine management, help with daily tasks like bathing, feeding, getting dressed, etc.

» WRAPAROUND SERVICES

A range of services, including medical and mental health care, provided to individuals living in emergency shelters.

TOOLS: » POCKET GUIDE OF HOMELESS RESOURCES

Easy-to-read guide of resources for individuals experiencing homeless to connect with needed amenities and services.



Transitions — Actively Aging Program | Copyright: Transitions Homeless Center

SPOTLIGHT:

» **TRANSITIONS — ACTIVELY AGING PROGRAM**

Transitions is a homeless shelter in Columbia, South Carolina with the Active Aging Program, for people ages 62 and older. Not only are older adults housed there, but they are provided classes and services in four key areas: health, finances, housing, and end-of-life planning.

SUPPORTIVE SERVICES

STRATEGIES

INSIGHTS

HOLISTIC SERVICES

- » The people setting regulations and policies are often not the ones needing to follow them, leaving people on the ground to figure out how to actually make them work for their needs.
 - » Personalized, customized, and dignified supportive services can make the difference between care that works and care that hurts.
 - » While some people need specific services to meet specific needs, others have a broader array of needs that are best addressed in a coordinated and holistic way.
 - » Some people are lucky enough to find “system guides” to help them through the complicated landscape of supportive services. Others are not so lucky, and are left to cobble resources together.
-

LONG-TERM CARE

- » The concept of long-term care is not generally understood, so most adults don’t plan for it, and are facing limited options when it is needed.
-

CAREGIVING

- » The compensation that caregivers receive often does not reflect the actual time and effort they put in to truly meet the needs of their clients.
- » Caregiving to a loved one is a financially, physically, and emotionally demanding role. Sometimes, the demands of the role overshadow its rewards.



HOLISTIC SERVICES

Develop service delivery systems that are coordinated, integrated, and easy to access.

The nature of supportive services is complex and often, unintuitive. Given this widely expressed reality, the systems that are in place need to be better coordinated, integrated, and easy to access. There is a great desire and need for a more holistic approach throughout the range of services received by older adults and people with disabilities. For example in health care, attention should be given to not only physical health, but mental and emotional health, as well. When it comes to services, they should be more consolidated and centralized so that older adults and people with disabilities can easily find entry and exit points and transition between agencies and organizations more fluidly, without the loss of information and care.

“

I don't even know how [I found her]. If I'm worried about it – Linda! I ask her about everything and she doesn't say no. She maybe gives you the phone number to call, but then you don't have to look for it.”

— Carmen Gueretta, Older Adult (Alameda County)



CONCEPTS

POLICIES:

» STATEWIDE PROVIDER EVALUATIONS

Required third-party assessments that are made publicly available, that evaluate care facilities that receive government assistance, including residential care, person care and other home- and community- based services. Regularly conducted evaluations can monitor the presence of qualified staff, discharge procedures, and the communication of patient rights.

» EXPANDED DUAL-ELIGIBLE PILOT

Continuation of combined Medicare and Medicaid benefits through one managed care plan under the Financial Alignment Initiative and/or through other state-led legislation.

» INTEGRATED HEALTH CARE AND MENTAL HEALTH SERVICES

Mental health services covered as part of health care plans, and through Medicare/Medi-Cal, similar to the coverage of physical health care needs.

» ROUTINE COGNITIVE SCREENINGS

Cognitive screenings offered for all adults, particularly those age 65 and older, as part of wellness checkups for prevention and early detection.

» “NO WRONG DOOR” MODEL

A “no wrong door” approach to supportive services at the state level that trickles down through funding and trainings so holistic services can be provided at a local level. A “no wrong door” model supports the idea that clients should be able to approach the agency with the problem they need to address, rather than a preconceived idea of the programs or services they think that they should receive.

» CARE COORDINATION MODEL

A coordinated care model at the state level that requires health care and social service providers to improve health information exchanges and transitions between facilities, as well as provide increased continuity and communication of medical and non-medical services, such as housing and nutritious food.

» INTERDISCIPLINARY TEAM CARE MODEL

An “interdisciplinary team care” model for high-risk patients addresses the full range of patient needs, integrating health care and non-medical services and requires the presence of interdisciplinary physicians and health care staff at all care plan meetings.

SERVICES AND PROJECTS: » "ONE-STOP SHOP" MODEL

Supportive services available in locations that are easily accessible and centrally located within a community.

» "NO WRONG DOOR" TRAININGS

Staff trainings that support a "no wrong door" approach and allow service providers to identify the client's needs upfront and identify the best next steps for the client (referring the client to an external agency or community service, screening for eligibility, or taking in benefits applications).

» SHARED MEDICAL APPOINTMENTS

Patients with common needs brought together with one or more health care providers for a shared appointment. A shared appointment is typically 90 minutes long, allowing participants to spend more time with the health care team and with other patients dealing with similar health issues, fostering a sense of shared experience and community to mitigate feeling isolated in the aging process.

» SYSTEM GUIDES

An individual available to an older adult or person with a disability to help them navigate a range of supportive services, either coordinating services themselves, or directing them to the right resources.

TOOLS:

» CENTRALIZED ONLINE TOOL FOR SUPPORTIVE SERVICES

A centralized online platform where general forms for supportive services can be completed and shared with service providers, as needed, to reduce paperwork and redundancies.

» GUIDEBOOK OF SUPPORTIVE SERVICES RESOURCES

A user-friendly, consolidated list of locally available supportive services and resources for older adults and people with disabilities that is updated regularly.

» TELEHEALTH STATIONS/KIOSKS

Small physical booth, located in convenient locations like local pharmacies or grocery stores, where patients can go to access a range of medical specialists either virtually or in-person.

“

This service is really good, because a lot of seniors like them really need one station serving everything. Their daughter doesn't know English, and none of them can drive.”

— Joyce Chan translating for Tian Jun Zheng and Quan Xia Liao,
Older Adults (Alameda County)





Vermont Psychiatric Hospital Telemedicine | Copyright: Vermont Public Radio

SPOTLIGHTS:

» **VERMONT TELEMEDICINE**

The Telemedicine Program of the University of Vermont Medical Center provides virtual care across the region. Patients are able to access high-quality specialty medical consultation, and emergency care through video conferencing, online health records, and remote monitoring of their vital signs.

» **SWEDEN'S ESTHER MODEL**

"Esther" represents elderly persons who have complex care needs that involve a variety of providers. The model brings together people from different levels at various organizations to provide care to older adults with complex needs. All meetings involve at least one "Esther" to be sure that the patient's perspective is included.

HOLISTIC SERVICES

Provide services that consider the whole person – their background, experiences, preferences – and meet individual needs.

Care is not provided to faceless numbers, but rather people, each of whom are different with unique needs and desires. Therefore the services they receive should be administered in that way. Personalized and dignified care means taking the time to learn about a person's preferences — how they wish to be treated. It also means respecting each person, honoring their reality, and providing the highest quality service regardless of who they are. Programs should also be more consolidated and centralized so that older adults and people with disabilities can easily find entry points into services. The transition between agencies and organizations should also happen more fluidly, without the loss of information and care.

“

We have to look at how we can train and educate the people that run these kind of institutional homes for elders to let them know you've got some lesbians and some gay men in this place, and you need to support them just the way they are and not have them go back in the closet.”

— Gwen Boozé, Older Adult (Alameda County)



CONCEPTS

POLICIES:

» INCLUSIVE CARE PLANNING

Health care providers and assisted living facilities include primary stakeholders and their families in all conversations relating to their care, from inception to implementation.

» STAFF TRAININGS ON CULTURAL COMPETENCY/IMPLICIT BIAS

Trainings for all health care and supportive services staff that teach them about approaching clients with sensitivity and helping them recognize ageism and other implicit biases that may be present within themselves as well as the operations and culture of their organizations.

» ACCESSIBILITY REQUIREMENTS FOR NEW TECHNOLOGY

A required set of accessibility standards for all new technology and digital content that address a range of impairments including visual, auditory, physical, speech, cognitive, language, learning, and neurological disabilities.

SERVICES AND PROJECTS:

» INTEGRATED MENTAL HEALTH/TRAUMA SUPPORT

Staff training to recognize mental health issues and take a trauma-informed approach to providing services, as well as directing older adults to mental health resources for further support.

» SENIOR CENTERS BASED ON AFFINITY GROUPS

Affinity-based sites that provide a safe and comfortable space for older adults to gather, obtain services and resources, and find companionship with other older adults that share similar interests and experiences.

» SEPARATED GERIATRIC PSYCHIATRIC DAY CARE FACILITIES

Care centers dedicated to older adults with dementia and mental health issues that need specialized care and services.

TOOLS:**» TRANSLATION KIOSKS**

Translation services at supportive service facilities, in the form of kiosks with digital translation services, either with a digital translator or a person on the screen that is physically elsewhere.

» DIGITAL UNIVERSAL ASSESSMENT AND PREFERENCES SURVEY

A digital assessment and survey used by supportive services facilities, particularly those providing health care, to understand the specific needs and preferences of their clients. This standardized tool could become a part of the client's individualized care plan and if digital, be easily transferable across facilities and agencies.

“

A lot of staff members at facilities call residents ‘sweetie’ and ‘honey,’ and residents don’t like it. They think it’s undignified. So you need to call people by their name. And then they’ll say ‘we’re ready to change your diaper.’ That’s a dignity issue. It goes back to the individual. Everybody has a right to be treated with dignity and respect.”

— Devora Gonzalez, Long-Term Care Ombudsman Program (Kern County)





Los Angeles LGBT Center | Copyright: Wikimedia Commons

SPOTLIGHT:

» **LOS ANGELES LGBT CENTER**

The Los Angeles LGBT Center helps LGBTQ seniors navigate challenges around aging such as dealing with decreased physical capabilities, securing affordable housing, and remaining socially and intellectually engaged. They also help them process the discrimination, trauma, and ongoing struggles with their own identity.

HOLISTIC SERVICES

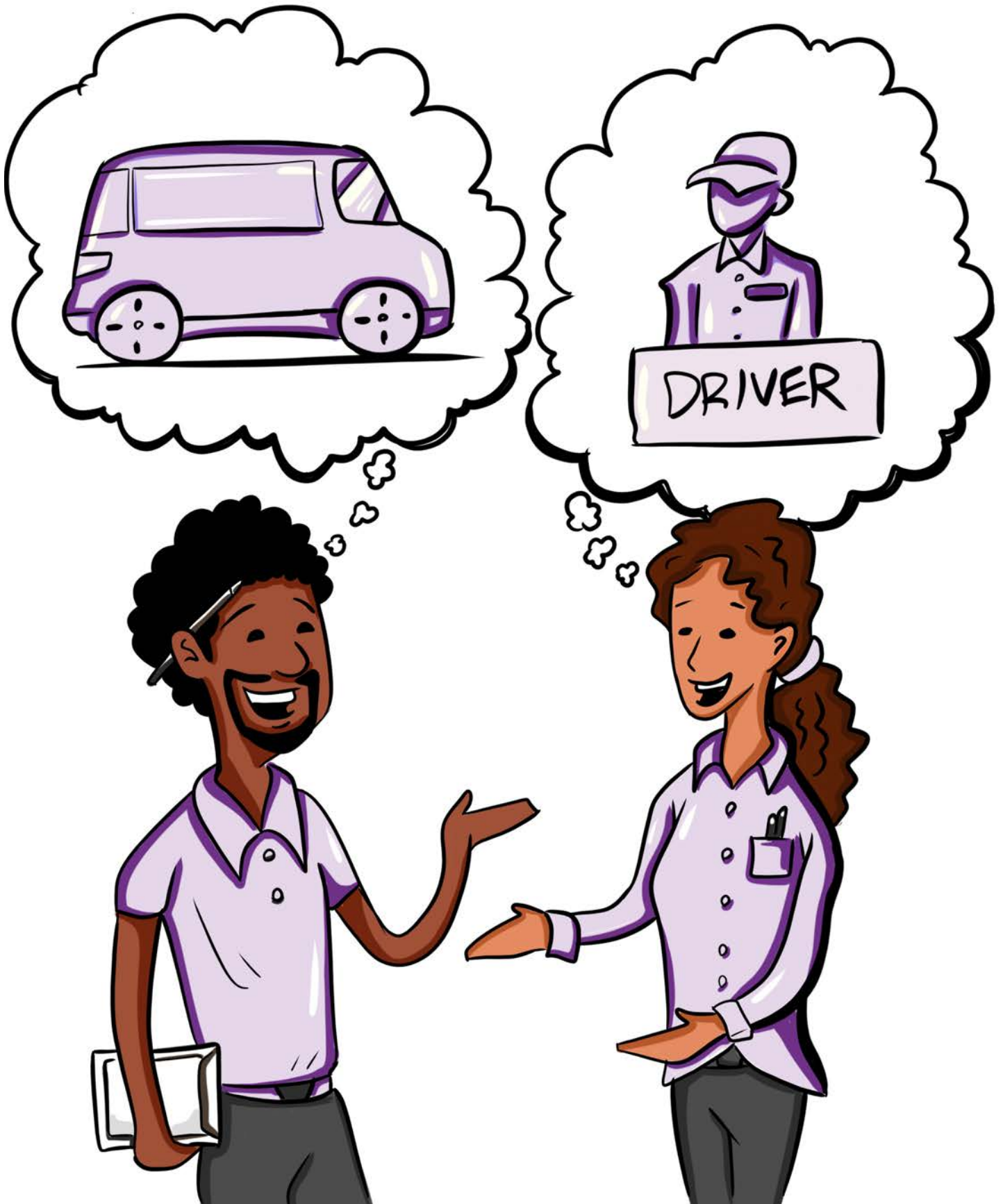
Support collaboration across sectors and between service providers and self-organized communities.

No one individual or entity can fully meet the needs of older adults and people with disabilities. It often takes a village. In this case the village can include service providers, faith-based communities, and families and friends serving older adults and people with disabilities. Some older adults are even forming or joining self-organized communities that rely on volunteers, peer-to-peer connections, and emphasize mutual beneficence. With so many people working toward a shared goal, there is a need for greater collaboration so that services are not duplicative and resources are used more efficiently. This also reduces the potential for burnout within individuals and organizations, while leveraging the greatest strengths of an individual or organization and providing more mutual benefits.

“

One bus driver say, ‘Hey Curt, look, when I was in between jobs, I went to Mary’s kitchen. Let me write this down for you.’ I went to Mary’s kitchen and it became a great place to go, eat, take showers, do everything. And then after that I began to share and give people a list...and the list became like 37 different organizations, churches.”

— Curtis Gamble, Older Adult (Orange County)



CONCEPTS

SERVICES AND PROJECTS: » CROSS-ORGANIZATIONAL SHARING PROGRAM

Program to connect organizations with duplicative and/or complementary resources so they can easily transfer and share those resources.

» COOPERATIVE DAY CENTERS

Day centers that follow a co-op model that both provide services to older adults and their unpaid caregivers, and are also a place where unpaid caregivers can volunteer their time in exchange for reduced costs to the older adult.

» FAITH-BASED CENTER PLACEMENT PROGRAM

Training program for health care professionals and volunteers within faith-based organizations so they can provide personalized and culturally sensitive services to older adults and people with disabilities within their congregations.



Beacon Hill Village, Boston | Copyright: LifePath, formerly Franklin County Home Care Corporation

SPOTLIGHT:

» THE VILLAGE MODEL

The Village Community model combines aging in place and encourages interdependent living, all to make aging alone possible for longer. Members of a village govern a non-profit and collect dues that go to paid staff. Through this network, older members are linked with one another and a system of volunteer and paid services that can provide help when needed. If you're sick, other villagers will visit and provide the support you need—and vice versa. Volunteer drivers can take you to the doctor. Service providers provide additional help. You can even find a trusted repair person to fix things around the house! And social events keep everyone connected.

HOLISTIC SERVICES

Expand and train a workforce that matches the growing need to serve an aging population.

With the growing number of adults, there is growing demand for and a shortage of a geriatric-trained workforce. These professionals and paraprofessionals range from geriatricians, caregivers, nurses, dementia specialists, and geriatric mental health experts to a host of other workers needed to address the specific needs of older adults. This shortage is particularly pronounced in rural areas where there are often not enough health care professionals, let alone those specializing in geriatrics. The stigma of getting trained in geriatrics and the high cost of training coupled with the high cost of living in California also make recruiting for this workforce particularly challenging. Solutions to these challenges will need to not only include financial incentives, but also training for those already serving older adults, as well as marketing strategies to attract new people into geriatrics.

“

One of my priorities would be to have enough staff and that could be in a nursing home or programs to be able to assist these individuals. If you have adequate staff in a nursing home and in the agencies, you're going to give a quality of life to someone. But if we're not adequately staffed to actually get to everyone, then everyone loses.”

— Devora Gonzalez, Kern County Long-Term Care Ombudsman Program (Kern County)



CONCEPTS

POLICIES:**» TUITION SUBSIDIES/LOAN FORGIVENESS FOR GERIATRIC PROFESSIONALS**

Tuition subsidies and loan forgiveness as incentives for studying and training to be a part of the geriatric services workforce.

SERVICES AND PROJECTS:**» GERIATRICS TRAINING FOR YOUTH**

Youth-focused trainings that teach youth caregivers, volunteers, and potential employees to work with and manage the needs of older adults and people with disabilities. This could also create a pipeline for a more robust geriatric workforce in the future.

» "CARE FOR AMERICA" PROGRAM

A program strategically placing doctors, health care staff, and social service providers in under-resourced areas lacking geriatric services, such as rural communities.

» GERIATRIC-NEEDS TRAINING FOR EXISTING HEALTH PROFESSIONALS

Trainings for current health staff and social service providers that offer insight on how to manage the needs of geriatric clients and people with disabilities and provide information on appropriate resources.



Geriatric Workforce Enhancement Programs | Copyright: Tallahassee Democrat

SPOTLIGHT:

» **GERIATRIC WORKFORCE ENHANCEMENT PROGRAM**

Funded through the Health Resources and Services Administration, this federal program helps train and support primary care practices in rural areas to offer better care services such as the Medicare annual wellness visit, chronic care management, advance care planning, and dementia care.

LONG-TERM CARE

Provide accessible and affordable channels for financing and saving for long-term care.

Long-term care is an essential service needed by many older adults, yet the costs are very high and continue to be an overwhelming burden on families. Currently there are not affordable mechanisms in place for financing and saving for long-term care for the vast majority of people. For those steeped in poverty, saving is not even an option and for those not already experiencing poverty, financing long-term care that they did not save or plan for can push them into it. Given the systemic nature of the problem, most solutions will also need to be systemic and consider how long-term care is priced, as well as how it can be paid for.

“

They tell them, oh well, he had Medicare. Well we only offer you if you want to place them for 100 days, then you have to pay for it out of your pocket. You're talking about anywhere from \$3,500 to \$6,000, depending on where you place them for 24-hour care. It is very expensive and it is definitely bankrupting families. My aunt gave up her time and said I'll take care of it. Somebody had to give up their job to take care of the family because that was cheaper than coming up with this large sum of money.”

— Natalie Franks, Social Service Provider (Orange County)



CONCEPTS

POLICIES:

» STATEWIDE REGULATIONS FOR CARE FACILITY COSTS

Required third-party assessments that evaluate and regulate the costs for care facilities receiving government assistance, including residential care, person care and other home- and community- based services.

» ASSISTED LIVING WAIVERS

Continued increased benefits through the Assisted Living Waiver pilot program that allows older adults to access and transition to assisted living through Medi-Cal.

» SINGLE-PAYER FINANCING SYSTEM

Government-operated, tax-funded health insurance plan for all California residents that covers a core set of benefits, including medically necessary surgeries, annual physicals, and preventive screenings.

SERVICES AND PROJECTS:

» "INSURANCE GROUPS" PROGRAM

Group health insurance that can be purchased by a "group" of individuals, not necessarily connected by family ties, that come together to form a "group." This would provide a more affordable insurance plan option than the individual plans available on the market. Similar options for obtaining insurance outside of an employer do exist, but require membership in an organization based on common interest, trade, or profession and these organizations often have strict membership requirements.



Military Family Long-Term Care Program | Copyright: Nami Greater Houston

SPOTLIGHT:

» **MILITARY FAMILY LONG-TERM CARE PROGRAM**

Relatives of uniformed service members are eligible to apply for long-term care insurance coverage available under the Federal Long-Term Care Insurance Program (FLTCIP). Eligible family members include spouses and domestic partners of active and retired members of the uniformed services, adult children of living active and retired members of the uniformed services, and parents, parents-in-law, and step-parents of active members of the uniformed services.

LONG-TERM CARE

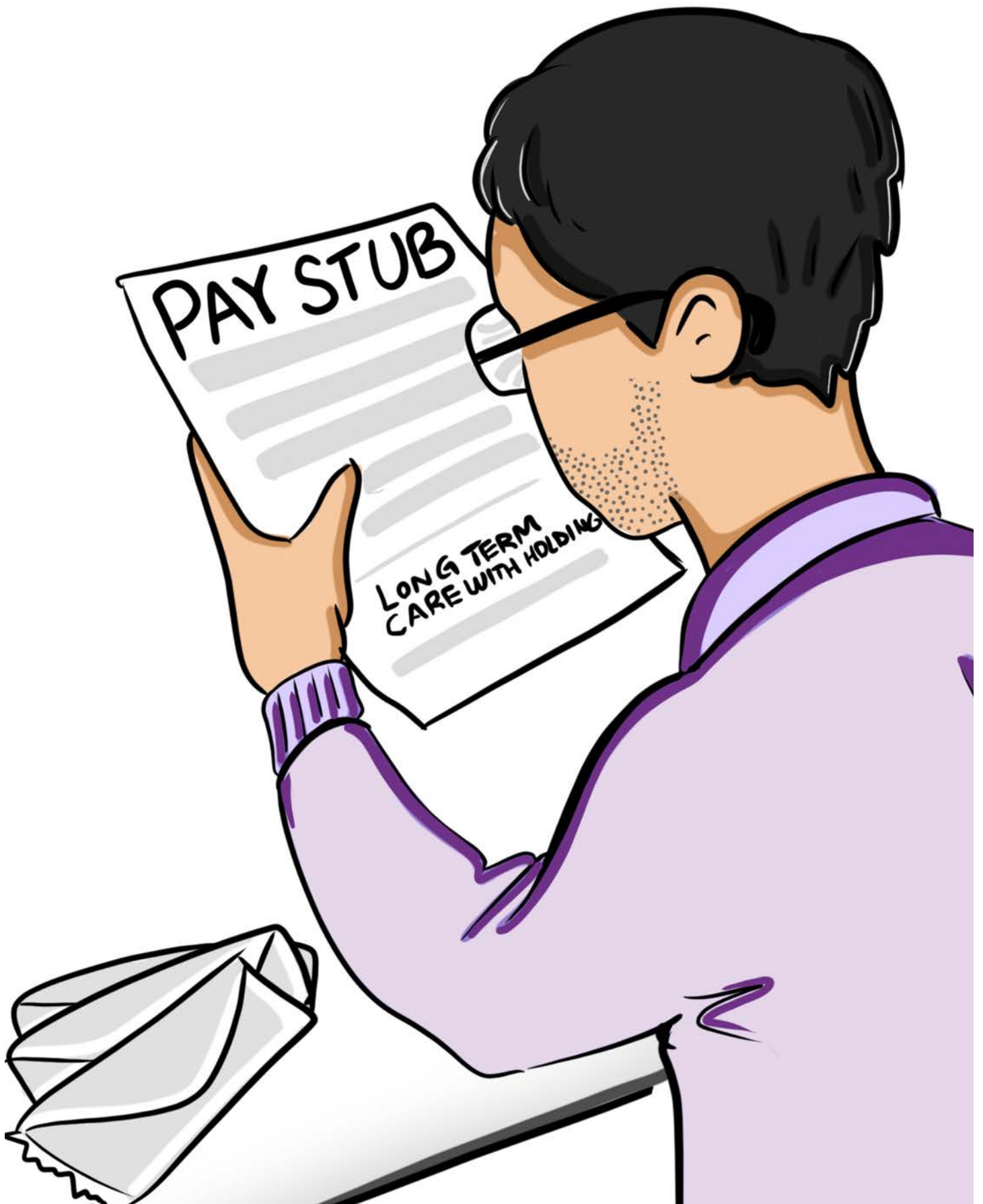
Incentivize planning and saving for long-term care.

Planning and saving for long-term care remains to be an afterthought for most people, until they need it, by which point options become much more limited. Some people don't see the potential for needing long-term care, whereas others wouldn't have the financial capacity to save for it even if they wanted to. Incentivizing planning and saving for long-term care will not only normalize this part of planning for aging, but could potentially mitigate the financial, emotional, and even physical consequences of not having any savings for the future.

“

When I was working, at one time they had offered us long-term insurance for myself or a parent. And I turned it down and I think God, I should've done it because I could've used it now.”

— Rosalinda Cruz, Older Adult (Kern County)



CONCEPTS

POLICIES:

» **GOVERNMENT LONG-TERM CARE SAVINGS PROGRAM**

Long-term care contributions out of employee paychecks put into a large pot and then paid out as benefits to those who are eligible, similar to Social Security benefits.

» **STATE-SPONSORED LONG-TERM INSURANCE**

Tax deductions from gross income allowed for payment of qualified long-term care insurance/savings premiums.

SERVICES AND PROJECTS:

» **EMPLOYER INCENTIVE PROGRAM FOR LONG-TERM CARE**

Employers offer long-term care insurance and matching funds as an option in benefit plans, treating their contributions as they would treat contributions to accident and health insurance.

TOOLS:

» **LONG-TERM CARE GUIDE/CHECKLIST**

A regularly updated place-specific resource that lists all long-term care options and the steps needed to obtain those forms of care.



Washington State Long-Term Care Insurance Program | Copyright: The Columbus Dispatch via AP/Joshua A. Bickel

SPOTLIGHT:

» **WASHINGTON STATE LONG-TERM CARE INSURANCE PROGRAM**

The *Long-Term Care Trust Act* is the country's first social-insurance program to pay for long-term care. All residents of Washington state will pay 58 cents on every \$100 of income into the state's trust. After state residents have paid into the fund for 10 years, they'll be able to utilize up to \$36,500 for assistance with regular daily activities such as eating, bathing, or help with medications.

CAREGIVING

Provide supports that alleviate the financial demands of caregiving.

As an alternative to long-term care in assisted living facilities or nursing homes, many older adults and people with disabilities turn to paid, in-home caregiving services. In-Home Supportive Services, as it's called in California, is a highly popular service, allowing an older adult to age in their home for a longer period of time. Other older adults are reliant on unpaid caregiving through family and friends. In both cases, taking care of an older adult takes a great deal of time, energy, and can also place significant financial demands on the caregiver. By alleviating the financial demands of caregiving, there is potential to reduce burnout amongst caregivers. In turn, older adults and people with disabilities are more likely to receive the level of care that they need. Reducing financial demands, thereby making caregiving a more lucrative employment option may also increase the pool of caregivers available.

“

I am given 17 hrs/week basically. But she needs much more than that. For instance, getting to and from medical appointments, eight minutes, we can't even get there in eight minutes. Preparing meals for instance, it's seven hours for the whole week, and it's hard to do that because she can't just eat sandwiches or anything like that. Then an hour a week for laundry. That's not going to happen.”

— Beverly Huggins, Caregiver (Kern County)



CONCEPTS

POLICIES:

» **INCREASED HOURS FOR CAREGIVERS**

Hours for In-Home Supportive Services (IHSS) caregivers that accurately reflect the time spent to meet the needs of their clients.

» **LIVABLE WAGES FOR CAREGIVERS**

Increased wages and benefits for paid caregivers that reflect the level of work required to meet the needs of their clients.

» **SUBSIDIZED CAREGIVER HEALTH CARE PLANS**

Subsidized health care services, including Medicare-Medicaid eligibility and benefits, for caregivers of older adults receiving benefits.

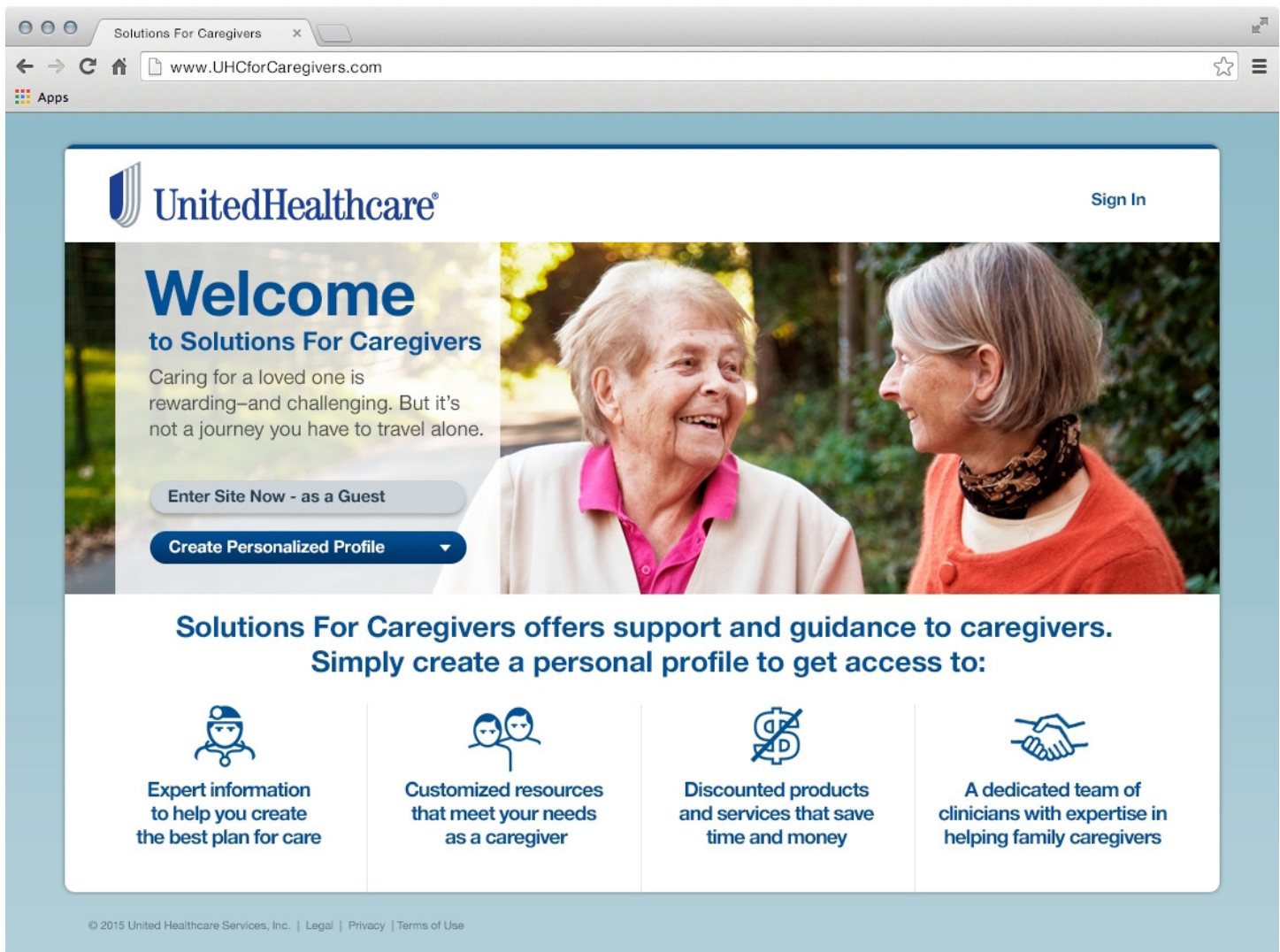
» **TAX BREAKS/CREDITS FOR CAREGIVERS**

Tax breaks for IHSS workers so they can make deductions based on their caregiving income, as well as tax credits for caregivers who aren't trained professionals but provide caregiving services to a loved one.

SERVICES AND PROJECTS:

» **FREE/REDUCED MENTAL HEALTH CARE FOR CAREGIVERS**

Free and/or subsidized mental health services for caregivers of older adults to alleviate some of the stress and anxiety of caring for a loved one during this challenging time of life.



Solutions for Caregivers Program | Copyright: UnitedHealthcare

SPOTLIGHT:

» **SOLUTIONS FOR CAREGIVERS PROGRAM**

Solutions for caregivers is a part of the United Healthcare Insurance program and helps caregivers connect with care managers, get discounts on products and services, and find the necessary information and resources.

CAREGIVING

Expand the pool of qualified caregivers so people can have a variety of care options.

Many older adults and people with disabilities prefer to age in place, but may not be able to do so due to a lack of caregiving options. There are also not enough affordable care facilities to meet the demand, creating an even greater need for in-home caregivers and this need will continue to rise as the aging population continues to increase. There are also a number of family and friends that serve as unpaid caregivers, but are not trained to provide the level of care that a person might need. Expanding the pool of qualified caregivers can help address the need for more caregivers, and can make the difference between an older adult getting to stay at home or having to go to a facility.

“

Right now I'm concerned about being healthy myself. If you're sick [as a caregiver], then both of [my parents] have a problem.”

— Siu Wun Cheng, Older Adult and Caregiver (Alameda County)



CONCEPTS

POLICIES:

» EXPANDED CAREGIVER POOL

Removal of barriers for more groups of people, such as foreign nationals, to work as in-home caregivers while increasing access for older adults.

SERVICES AND PROJECTS:

» CAREGIVER RECRUITMENT CAMPAIGN

Campaign that raises the perception of the profession, provides education and awareness on the necessity and realities of caregiving, and directs potential caregivers to recruiters.

» IN-HOME CARE TRAINING PROGRAM

Training program that allows in-home caregivers to receive formal training and permits them to take on certain medical duties — such as managing diabetes, Alzheimer's disease care, and physical therapy — currently performed by nurses and other skilled practitioners.

TOOLS:

» CAREGIVING RESPITE APP

A web-based or phone app that connects those interested in providing caregiving services with those that need services. It also allows caregivers to find and schedule other caregivers to come in and relieve them for a period of time.



Vermont Adult Family Care | Copyright: Vermont Public Radio

SPOTLIGHT:

» **VERMONT ADULT FAMILY CARE**

Adult Family Care, managed by the state of Vermont, is a 24-hour, home-based, shared living option. Agencies are paid by Medicaid to contract with private, unlicensed family homes that house and care for one to two people that are not related to the home provider. The home provider receives a tax-free stipend.

SOCIAL EMOTIONAL WELL-BEING

STRATEGIES

INSIGHTS

CELEBRATING AGING

- » Even though no one can escape aging, we have deprioritized it as a society, characterizing it as something to be feared, burdened by, or simply ignored, rather than something to elevate and celebrate.
 - » Many older adults have experienced trauma in their life that has gone unaddressed. Those traumas continue to show up in their lives and can affect their health and overall well-being.
-

PLANNING FOR AGING

- » While we plan for many aspects of our life and sometimes even our death, most of us don't plan for aging.
-

CAREGIVING

- » Caregiving to a loved one is a financially, physically, and emotionally demanding role. Sometimes, the demands of the role overshadow its rewards.
 - » Having supportive family and friends around makes other life challenges much more manageable.
-

JOB/VOLUNTEER OPPORTUNITIES

- » Older adults have a wealth of knowledge, skills, and experiences they want to offer society, but their value is not always recognized and their wisdom is underutilized.
- » Older adults want to engage in activities that bring their life purpose and meaning, and want to do so in ways that challenge them and push them to grow.
- » The active lifestyles older adults are leading (or want to lead) don't always match the sedentary perception of retirement that people have.



CELEBRATING AGING

Promote an aging-positive public narrative.

There is a lot of stigma around aging. Even though many older adults are leading very active and purposeful lives the prominent narrative often portrays them as feeble and sedentary. An aging-positive narrative can highlight their resiliency, the richness of their past and current experiences, and the contributions they make to society. Whether it's the way older adults are talked about, the way they're portrayed in media, or even the way data is collected about them, these and other changes to the narrative can positively contribute to the way aging is perceived in this society.

“

If you could have coins for every bit of wisdom or value that seniors have, oh there would be no national debt. Everybody would be rolling in gold because there are so many of those nuggets of information and wisdom out there that older people have to offer.”

— Christine Schaefer, Older Adult (Orange County)



CONCEPTS

SERVICES AND PROJECTS: » PUBLIC ACTIVATION CAMPAIGN

Campaign that makes the general public aware of issues around aging and activates them to take actions to support older adults (changing language, planning for aging, volunteering with older adults, hiring older adults, etc).

» UNIVERSITY FELLOWSHIP PROGRAM

Partnership with universities to create fellowship programs where students conduct research with older adults, collect data, and identify trends.

» INCREASED AGING-POSITIVE MEDIA

Outreach and partnerships with media companies to produce aging-positive media such as ad campaigns, TV shows, movies, podcasts, etc.

TOOLS: » COMMUNICATIONS GUIDELINES

A set of standards that provide guidance on how to change communications and replace ageist language with more inclusive language for older adults and people with disabilities.



Wizdom Dance Team | Copyright: AARP

SPOTLIGHTS:

» **WIZDOM DANCE TEAM**

Sponsored by AARP, Wizdom is a dance team comprised of adults, ages 50-76, that perform once a month at the Washington Wizard NBA games. Though many of the dancers have chronic health conditions and some are even cancer survivors, they practice for several hours a week and put on high-energy performances. The nationally recognized team inspires others and is changing the perception of aging in America.

» **GRACE AND FRANKIE**

The Emmy-nominated comedy television show celebrates aging with grace. The now-beloved show sheds a light on critical issues around aging such as battling health conditions, facing workplace discrimination, and lack of accessibility in the built environment. It does so in a way doing so in a way that isn't overly cynical, but rather generates hope and awareness.

CELEBRATING AGING

Support new and existing channels that generate peer-to-peer community building.

Many older adults and people with disabilities are searching for social networks to relieve the effects of isolation. Some find it in their physical communities, through faith-based organizations, at their local community centers, or even within their own friends and families. Others are not so fortunate. They might not have family or friends around for social support, may not have amenities in their neighborhoods, or simply may not be sure how to go about finding these peer-to-peer opportunities. Supporting these channels for social connections can not only prevent the dire effects of social isolation, but can promote self-sufficiency, and in some cases even replace the need for formal supportive services.

“

This is a friend of mine, this lady, we've raised our kids about the same time, know each other, we go to the movies a lot together and she decided that she's having to be real careful with her diet. So she carefully constructs meals. It's difficult because she's by herself so to cook for one person. So she'll cook a meal and then she'll just make plates for me.”

— Ed Frakes, Older Adult (Alameda County)



CONCEPTS

POLICIES:

» **PRIORITIZED PEER-TO-PEER CONNECTIONS AT EXISTING GATHERING SPACES**

Prioritized social programming for older adults at existing spaces such as adult day centers, community centers, or libraries.

SERVICES AND PROJECTS:

» **WISDOM-SHARING CIRCLES**

Sharing networks, virtual and in-person, that allow older adults to come together and share their lifelong learning and experiences with others.

» **CLUBS AND CLASSES FOR OLDER ADULTS**

Free or reduced-price clubs and classes offered specifically for older adults, allowing them to learn and participate in social activities.

» **NEIGHBORHOOD SUPPORT GROUP**

Neighborhood groups in which individuals provide support and services to one another, ranging from providing meals to rides, to even providing companionship and emotional support to those in social isolation.

» **MEAL PREP BUDDIES**

A program where older adults can be assigned a personal shopper (another older adult or from a younger generation) that grocery shops and cooks with them, while they exchange recipes and tips on healthy eating.

TOOLS:

» **COMMUNITY MEAL CALENDAR**

A web-based tool where people can sign up to prepare and deliver nutritious meals to older adults in the neighborhood.

organize meals for a friend after a birth, surgery or illness



Meal Train | Copyright: Meal Train

SPOTLIGHT:

» **MEAL TRAIN**

Meal Train is an online crowdsourcing platform that allows people to schedule and organize receiving and providing meals between loved ones.

CELEBRATING AGING

Create opportunities for increased intergenerational connections.

Intergenerational connections can have long-lasting and mutual benefits for older adults, people with disabilities, youth, and other age groups. There is a wealth of experiences, wisdom, and social support that can be exchanged across these groups. Using an intergenerational lens not only increases the social and emotional well-being of older adults and people with disabilities, but can also accomplish a number of other strategies relating to their physical environment and the supportive services they receive.

“

I would advise younger people and older people to have more opportunities to mix and meld together. Whether it's for mentoring in a workplace, or having grandparents come to the classroom. Because you both learn from one another.”

— Christine Schaefer, Older Adult (Orange County)



CONCEPTS

POLICIES:

» **SHARED INTERGENERATIONAL GATHERING SPACES**

Shared physical spaces that serve the needs of younger generations and older adults, such as a gym or library, or even combining a daycare center with an adult day center.

SERVICES AND PROJECTS:

» **INTERGENERATIONAL VOLUNTEER PROGRAM**

Volunteer program specifically targeting and matching older adults with younger generations.

» **WISDOM-SEEKERS SCHOOL CURRICULUM**

Intergenerational exchanges integrated into school curriculums such as “Bring an Older Adult to School” Day or asking students to interview an older adult as part of an assignment.

» **SCHOOL PARTNERSHIP PROGRAM**

School programs requiring students to dedicate a certain number of service hours volunteering with or in service of older adults. This partnership can also bring older adults into the school as classroom volunteers, mentors, or visiting teachers.

» **“PHONE-A-SENIOR” MENTORING PROGRAM**

Hotline that younger generations can call to access advice and mentoring from older adults. Conversely, the hotline can also be a way for older adults to access younger generations to seek their help and guidance (e.g., using technology).

TOOLS:

» **ADOPT-A-GRANDPARENT APP**

App that matches and connects younger generations with older adults looking for companionship.



Vist-A-Bit Program | Copyright: Visit-A-Bit

SPOTLIGHTS:

» **FOSTER GRANDPARENT PROGRAM — ONE HOPE UNITED**

Based in Illinois, the One Hope United Foster Grandparent Program offers seniors age 55 and older the opportunity to serve as mentors, tutors, and caregivers for youth with special needs. Volunteers serve in a variety of locations throughout the community, including schools, after-school programs, Head Start, child care centers, and youth centers.

» **VISIT-A-BIT PROGRAM**

Designed to directly address older adult loneliness, Visit-A-Bit is a weekly socialization program in the St. Louis area that connects volunteers with older adults that may be living alone or in a senior community to develop meaningful relationships.

PLANNING FOR AGING

Make planning for aging an integrated part of Californians' lives.

Many of life's big transitions and milestones receive a lot of attention and planning, but planning for aging often does not. Whether it's due to stigma associated with aging, a lack of awareness, or simply because other components of life take priority, planning for aging is not an integral part of most people's purview. By integrating the planning into everyday lives, it can become more normalized and remain at the forefront rather than something to deal with when it's necessary, but often too late.

“

Christine: It's not that we didn't think about getting older, but we didn't see ourselves doing it.

Deborah: I just think we didn't worry.

Christine: Well, we didn't know.”

— Christine Schaefer and Deborah Chaput, *Older Adults* (Orange County)

ROOSEVELT HIGH SCHOOL

PLANNING FOR AGING

AGENDA

-
-
-
-
-
-
-
-
-
-



CONCEPTS

POLICIES:

» **ADVANCE HEALTH CARE DIRECTIVE AT PUBLIC FACILITIES**

An advance directive for health care for each Californian that states a person's health care wishes in the event that they are unable to communicate or make health care decisions. These can be collected while receiving other services such as getting an ID or driver's license, or obtaining food stamps.

SERVICES AND PROJECTS:

» **PUBLIC CAMPAIGN ON LONG-TERM CARE**

Campaign that makes the general public aware of issues around aging and activates them to take actions to support older adults (changing language, planning for aging, volunteering with older adults, hiring older adults, etc).

» **SCHOOL CURRICULUM ON PLANNING FOR AGING**

Curriculum for school-age children that introduces the physical, financial, and emotional parts of aging and prepares them to plan for it from a young age.

» **CLASSES ON PLANNING FOR AGING**

Education and training offered for adults to learn about the physical, financial, and emotional parts of aging.

» **LEGAL AID FOR PLANNING FOR AGING**

Legal aid at a free or reduced price for navigating the legalities around aging including advanced health directives, living wills, long-term care planning, etc.

» **RESOURCE FAIR ON AGING**

Resource fair where people can learn about and gather resources all in one place from social service providers, health care providers, and other stakeholders focused on aging services.



UCLA Class: Frontiers in Human Aging | Copyright: Ktoo Public Media (Heidi de Marco/KHN)

SPOTLIGHT:

» **UCLA CLASS: FRONTIERS IN HUMAN AGING**

This UCLA class recognizes that many of their students will live decades longer than their ancestors and delves into the process of aging. It provides hands-on education through “Elder Interviews” and “Service Learning” in the Los Angeles area, and explores critical issues relating to living longer, more fulfilling lives.

PLANNING FOR AGING

Create resources for families and loved ones to have conversations on aging.

An important component of planning for aging is having conversations with families and loved ones about it. Sometimes the planning requires tough conversations to be had, whereas other times it may be hard to even know where to begin. Without these important conversations, however, older adults and their loved ones may not know how best to proceed when tough circumstances arise, and may have to resort to making reactionary decisions without knowing the wishes of older adults, or disregarding them altogether. Through a set of resources, families and loved ones can plan with, help protect, and manage the care for older adults and people with disabilities in an informed and proactive way.

“

She says, mom, I don't know why we never planned this...sit with your family. Talk Mama, when you get old or Mama is the one who initiates the talk and all of them says, the family, when your dad gets old, we have to be ready now to start saving or building up for the future. Prepare yourself for when you get old. Know that you're gonna get old. The problem's instead of being a problem, you have to learn how to manage them.”

— Carmen Gueretta, Older Adult (Alameda County)



CONCEPTS

POLICIES:

» **STRINGENT REGULATIONS AGAINST PREDATORY LENDING**

Legislation that prevents predatory lending such as making exorbitant interest rates illegal, making financial exploitation of older adults a crime, and investigating all suspected cases of abuse, neglect, and financial exploitation of older adults.

SERVICES AND PROJECTS:

» **EXPANDED FAMILY COACHING PROGRAM**

A family coach dedicated to working with a family as they plan with and for aging members of the family, similar to the services already provided by Aging and Disability Resource Centers (ADRCs).

TOOLS:

» **AGING CHECKLIST**

Easy-to-use reference checklist and worksheet that outlines the most important considerations when planning for aging.

» **PLANNING FOR AGING CARD DECK**

A deck of cards with conversation starters, facts about aging, and resources that can be used by families.

» **"SENIOR SCAMWATCH" WEBSITE**

A website where anyone can alert people about scams, and older adults can inquire about potential scams and share their experiences.

» **AGING GAME**

Aging game where families can learn and have conversations about aging in a fun way.

PREPARE TO CARE

A PLANNING GUIDE FOR **FAMILIES**

AARP Planning Guide for Families | Copyright: AARP Planning Guide for Families

SPOTLIGHT:

» **AARP PLANNING GUIDE FOR FAMILIES**

This planning guide is a practical tool on how to provide care to a family member or loved one. It includes resources, checklists, as well as a glossary and organizations that can provide further information or assistance.

CAREGIVING

Provide supports that alleviate the physical and emotional demands of caregiving.

Many older adults look to age in place with the help of caregivers. Some are paid and are part of the In-Home Supportive Services program. Others are unpaid family and friends. In both cases, taking care of an older adult takes a great deal of time, energy, and can also place significant physical and emotional burdens on the caregiver. By alleviating the physical and emotional demands of caregiving, there is potential to reduce burnout amongst caregivers, and in turn, older adults and people with disabilities are more likely to receive the level of care that they need. Reducing the physical and emotional demands can also make caregiving a more attractive employment option, thereby increasing the overall pool of caregivers available.

“

I'm thankful, but at the same time I'm trapped. The only thing I do is pray, and I ask the Lord to provide me with endurance and wisdom. I really need the strength so I won't break down. When she's restless and can't go to sleep, she gets up and tries to walk without the walker. That's the reason I always have to watch her.”

— Maggie M. Edwards, Older Adult and Caregiver (Orange County)



CONCEPTS

SERVICES AND PROJECTS: » FLEXIBLE WORK HOURS FOR CAREGIVERS

Work policies negotiated between caregivers and their employers that allow caregivers to work flexible hours in order to provide care to family members, without the risk of losing their job and without having to take paid time off as part of the *California Paid Family Leave Act*.

» CAREGIVERS FOR CAREGIVERS

Respite program that sends temporary caregivers to relieve caregivers of their duties for a short period of time.

» CAREGIVER SUPPORT GROUP

Virtual and in-person support groups for caregivers.

» FREE/REDUCED MENTAL HEALTH CARE FOR CAREGIVERS

Free and/or subsidized mental health services for caregivers of older adults to alleviate some of the stress and anxiety of caring for a loved one during this challenging time of life.

TOOLS:

» CAREGIVING RESPITE APP

A web-based or phone app that connects those interested in providing caregiving services with those that are needing services. It also allows caregivers to find and schedule other caregivers to come in and relieve them for a period of time.

» CALENDAR FOR CAREGIVING

A digital calendar that allows caregivers and older adults to schedule family and friends to provide various caregiving services (rides, meals, etc.).

» CAREGIVER "QUESTIONS TO ASK"

A list of FAQ questions and answers that caregivers should consider, as well as questions they can ask social service providers and health care providers.

» CAREGIVER HOTLINE/PHONE TREE

A hotline caregivers can call for immediate, non-emergency assistance regarding their physical, social, and emotional needs or the needs of the older adult they are caring for.



Papa App | Copyright: Papa App

SPOTLIGHT:

» PAPA APP

The Papa App connects College Students to Older Adults who need assistance with transportation, house chores, technology lessons, companionship, and other services. The app speeds up the process of finding qualified help and allows an older adult to access help for as little or as long as they need.

JOB/VOLUNTEER OPPORTUNITIES

Remove barriers and increase incentives that allow people to participate in the workforce longer.

Many older adults are interested in remaining employed longer because it can keep them active, can provide them with a much-needed income, give them a routine, community, and even a purpose. However, continuing to remain in the workforce is not always an option for a number of reasons. Some might find it difficult to get to employment because of mobility issues — some might face ageist employment practices — and others might lack the necessary skills and experience. Solving for these challenges will require training and aiding older adults and people with disabilities to acquire these work opportunities, but also preventing age discrimination in the workplace and encouraging employers to hire older adults and people with disabilities. While these tactics allow older adults and people with disabilities to give back to society, they can also be mutually beneficial for employers or organizations looking for workers.

“

So I'm a teacher for the art class [at Easterseals]. Well I enjoy doing, helping, you know. One time I got a job somewhere and then they took my SSI so I didn't want that. So I decided no, I'll just volunteer where I want to and come whenever.”

— Barbara Vega, Older Adult (Orange County)



CONCEPTS

POLICIES:

» **REGULATION PERMITTING SSI RECIPIENTS TO WORK**

Permit Supplemental Security Income (SSI) recipients to work up to a certain number of hours without it affecting their SSI benefits.

» **FUNDING FOR SENIOR EMPLOYMENT PROGRAMS**

Fund existing and new employment programs that provide job training and job placement services to older adults.

SERVICES AND PROJECTS:

» **CORPORATE PLEDGE**

A pledge in which corporations make a commitment to train and hire a certain number of older adults and create a phased retirement program.

» **INCENTIVES FOR BUSINESSES PROGRAM**

Incentives in the form of tax breaks, waived fees, expedited permits, etc., for businesses that train and hire a certain number of older adults and/or people with disabilities.

» **VOLUNTEER REWARDS PROGRAMS**

Incentives for older adults that volunteer for a certain number of hours ranging from free movie tickets to restaurant vouchers or even gift cards to local and online grocery stores.



Senior Community Service Employment Program | Copyright: Phoenix Homes Arizona

SPOTLIGHTS:

» **SENIOR COMMUNITY SERVICE EMPLOYMENT PROGRAM**

Based in Illinois, the One Hope United Foster Grandparent Program offers seniors age 55 and older the opportunity to serve as mentors, tutors, and caregivers for youth with special needs. Volunteers serve in a variety of locations throughout the community, including schools, after-school programs, Head Start, child care centers, and youth centers.

» **AEROSPACE**

Aerospace, based in El Segundo, California has a phased retirement plan program that offers flexibility to older employees to work reduced hours over time, while still being part of a team that can benefit from their years of experience and skills. They re-hire retirees to work up to 20 hours a week, or on a temporary basis. This allows employees to transition out of the workplace while collecting full benefits. A retiree can work up to 1,000 hours per year. There are up to 250 employees ranging in age from 62 to 90.

JOB/VOLUNTEER OPPORTUNITIES

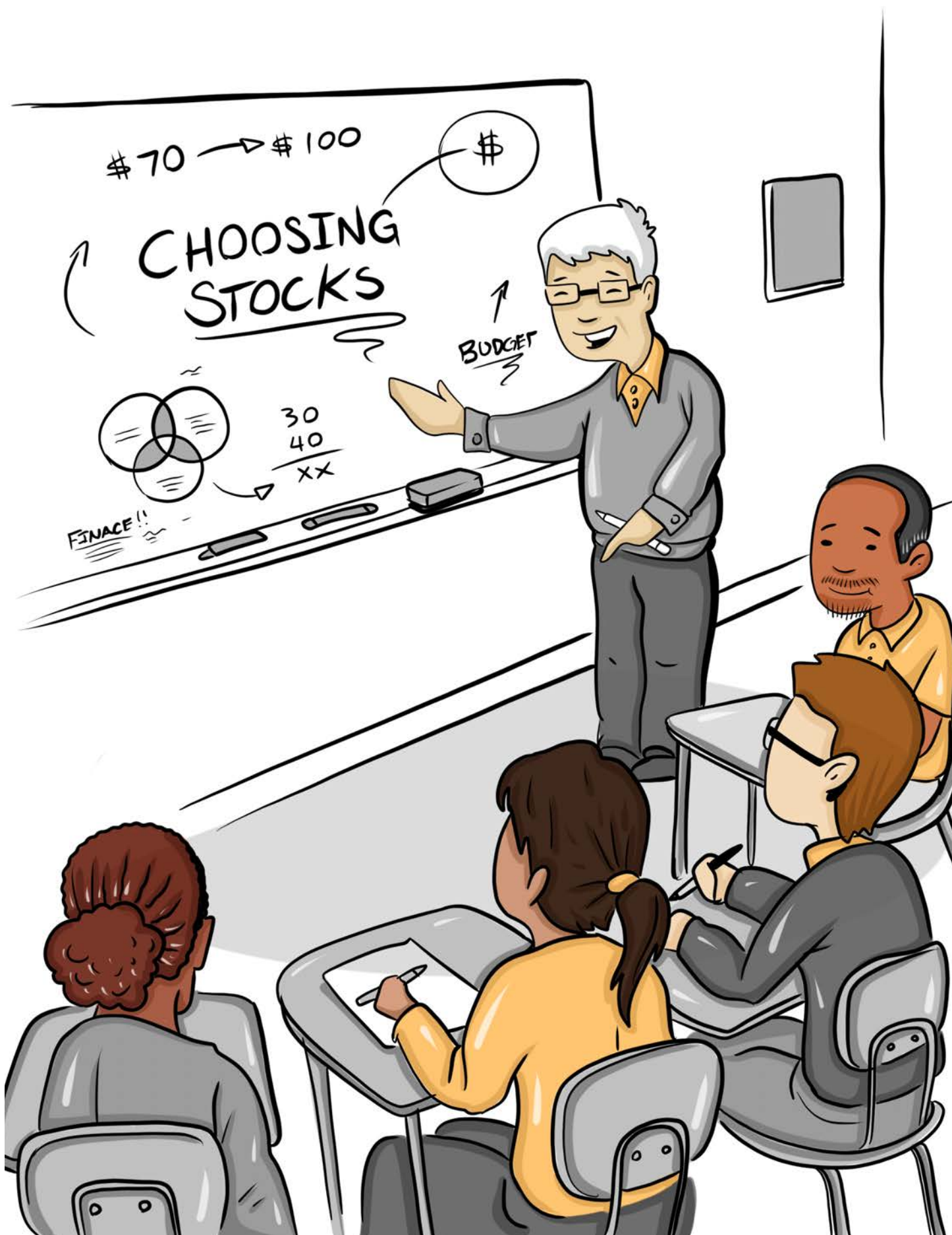
Help older adults in transferring existing skills, or learning new skills that can be used in their everyday lives.

Older adults have a wealth of knowledge to offer society and also have a strong appetite for continuing to enhance their skills. While some avenues exist, not everyone is able to find entry points to offering their knowledge or acquiring new knowledge. Some may face financial limitations, physical limitations, or might just be unaware of the opportunities available to them. However, when older adults and people with disabilities are provided the opportunity to easily, affordably, and conveniently transfer and/or learn new skills, they can continue to be mentally active, be more socially engaged, and may even find employment as a result of their newfound skills.

“

I wanted something to do. I just didn't want to be a couch potato or vegetate. I want to keep younger in mind and body, keep active. And so I came in here, I met Norma who inspired me too, and I've only been quilting about six, seven years...you learn another technique. You learn another skill. If somebody makes something and we all like it. Then we say, will, you teach us and then we do it, we all do it.”

— June Slater, Older Adult (Kern County)



CONCEPTS

SERVICES AND PROJECTS: » TECH CLASSES FOR OLDER ADULTS

Free tech classes for older adults to keep them updated on new technology, particularly technology that supports their daily needs, such as using smartphones, smart TVs, rideshare apps, video chatting, etc.

» FREE/REDUCED COLLEGE TUITION

Free or reduced tuition for older adults at universities and colleges to reduce financial barriers around continuing education.

» PEER-TO-PEER LEARNING PROGRAM

Skill-sharing program that allows older adults to teach classes and skills to other older adults virtually and in-person.



Emeritus Institute at Saddleback College

SPOTLIGHT:

» **EMERITUS INSTITUTE AT SADDLEBACK COLLEGE**

The Emeritus Institute at the Saddleback College provides lifelong learning through tuition-free, academically rigorous, mentally stimulating, socially engaging, and health improvement courses for older adults throughout south Orange County.

JOB/VOLUNTEER OPPORTUNITIES

Build pathways for older adults and people with disabilities to access job and volunteer opportunities.

Many older adults and people with disabilities are looking to find employment or volunteer their time, however, the ways in which they can do so are not always apparent or easily accessible. Large job and volunteer portals can be difficult to navigate, are not highly monitored when it comes to age discrimination, and rely on biased algorithms that place people. Alternatively, more personalized and intentional pathways can help older adults and people with disabilities access job and volunteer opportunities more easily and connect them to work that better fits their needs and interests.

“

I really wanted to give back. I took an early retirement years ago...I wanted something to fill my days. When I was starting to look for something, my parents became ill. Both had Alzheimer's, so my job search was put on hold to take care of them...I actually started on Meals on Wheels. I didn't know about VIP rides and they said, we really need drivers. Would you like to try it? And I did. And ever since then I was hooked. I love it and I feel like I'm honoring my parents, too.”

— Michelle Reed, Older Adult and Volunteer Service Provider (Alameda County)



CONCEPTS

SERVICES AND PROJECTS: » **AGE-FRIENDLY JOB/VOLUNTEER FAIRS**

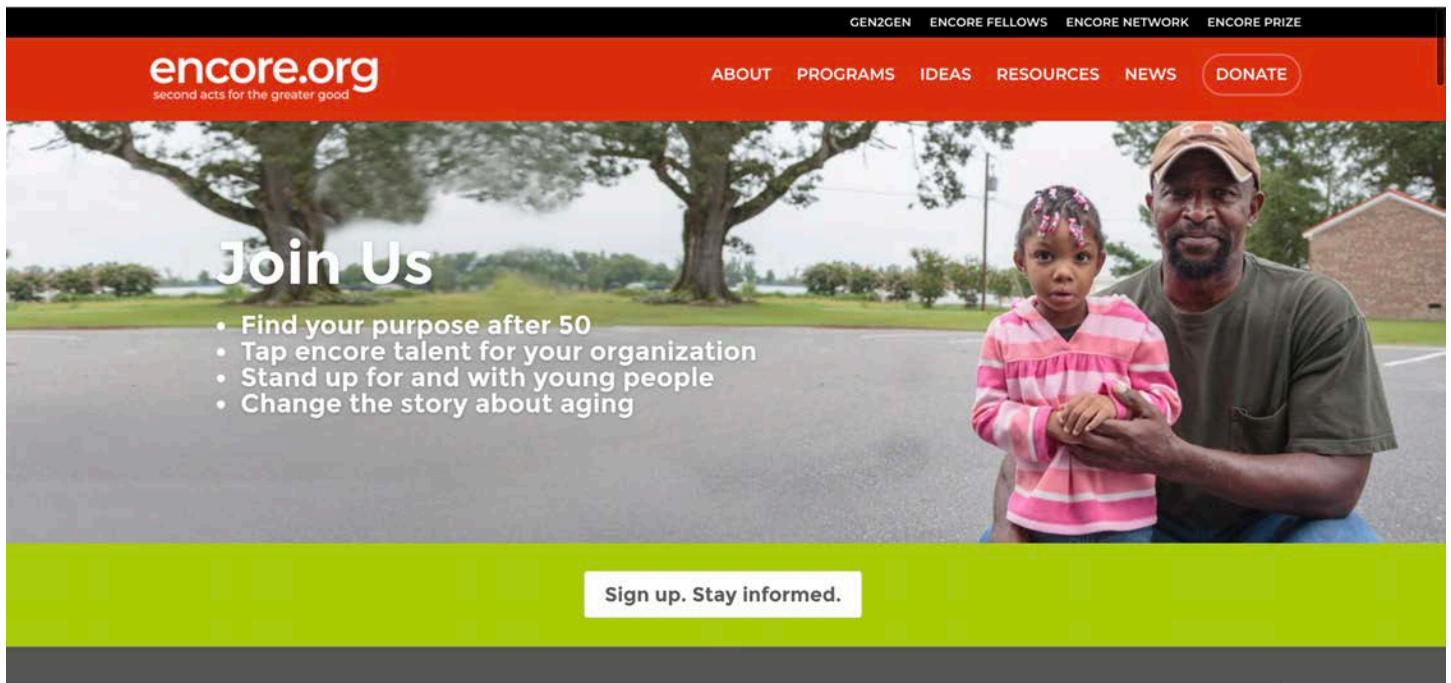
Job fairs with job and volunteer opportunities specifically targeted toward older adults and people with disabilities.

» **VOLUNTEER CENTER**

A physical location, ideally co-located with other services, where older adults and people with disabilities can go to sign up or search for volunteer opportunities.

TOOLS: » **VOLUNTEER HOTLINE**

Hotline that older adults and people with disabilities can call to sign up for volunteer opportunities.



Encore | Copyright: Encore

SPOTLIGHTS:

» **ENCORE**

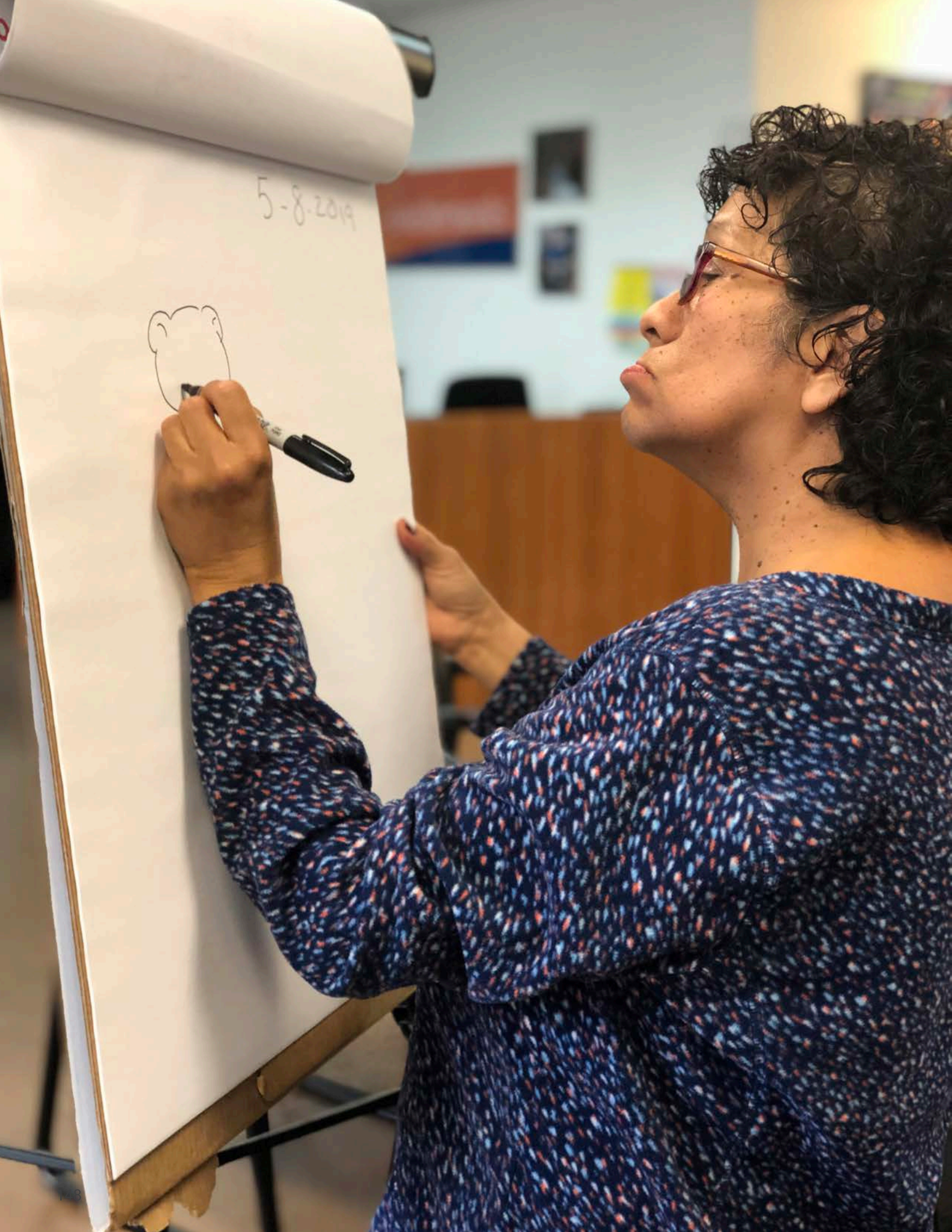
Encore is an innovation hub that matches seasoned professional older than 55 to high-impact paid leadership engagements in the social sector, whether it be through jobs, fellowships, or even networking.

» **WORKFORCE 50**

Workforce50.com is an online job portal for adults 50 years and older. It has a search engine for jobs as well as information from experts on topics such as finding your life's purpose, raising grandchildren, avoiding mistakes on LinkedIn, and resumé writing.



APPENDIX



5-8-2019



WHY A MASTER PLAN FOR AGING?

The number of older adults is projected to grow almost 90 percent by 2030 to 8.6 million.

1 in 5 older adults currently live in poverty.

California currently has the highest population of older adults of any state, and the number of older adults is projected to grow almost 90 percent by 2030 to 8.6 million. This presents an unprecedented opportunity for us to build an age- and ability-friendly state that promotes healthy and active aging and ensures a high quality of life for all residents.

Today, however, about 1 in 5 older adults currently live in poverty, which more commonly affects women, African Americans, Latinos, people in poor health, and people with disabilities. Additionally, older Americans are now more likely than not to be single, childless, living alone, and have lower incomes with limited to no savings for retirement and long-term care. Given these facts, the need is immediate, but it is also a critical time, where the actions taken today will set the trajectory for aging in California for decades to come.

Older adults and people with disabilities across the state need a Master Plan for Aging that celebrates their lives and honors their realities. We have a unique opportunity to ensure that all Californians can age in place with dignity.



A HUMAN-CENTERED DESIGN PROCESS

To ensure that the Master Plan for Aging honors and responds to the diverse realities of Californians, Greater Good Studio (GGS) set out to elevate the voices of real people, and center their needs and assets in the planning process. They spent several months learning from older adults, people with disabilities, and those who support them.

GGs conducted “day in the life” research sessions with over 20 older adults and their care teams to understand their activities, behaviors, needs, and assets related to their long-term care and quality of life. They talked to people in their homes, went on walks in their neighborhoods, accompanied them while they got their groceries and medicine, and even shadowed them as they volunteered or spent time with family and friends.

GGs worked closely with regional coalitions throughout the state to identify and meet with individuals living in rural, suburban, and urban communities. They learned from a broad cross section of individuals of diverse racial/ethnic backgrounds, income levels, ability levels, and housing situations.



With the regional coalitions and The SCAN Foundation, GGS facilitated five community design workshops that were attended by over 300 stakeholders, including older adults, people with disabilities, social service providers, policymakers, elected officials, and research participants. We shared these insights from our research, and invited workshop attendees to generate further questions and brainstorm ideas in response to the challenges we heard. Collectively, the workshops generated over a thousand concepts aimed at improving the experience of aging in California. These concepts are the basis for strategies and ideas for policies, programs, and tools included in this final set of recommendations.



運動時間
星期一至星期五
早上 8:15

EXTENSION
Hold On To Parallel Bars. Stand Up Straight With Your Knee Straight. Lift Your Leg Back. And Then Back Down. Remember: Stand Straight And Don't Bring Your Leg Forward.
拿緊平衡木，直立，膝伸直。
腳向旁伸出，返回原位。
備記：要直立，腿不要向前伸。

EXTENSION
Hold On To Parallel Bars. Stand Up Straight With Your Knee Straight. Lift Your Leg Back. And Then Back Down. Remember: Don't Lean Forward.
拿緊平衡木，直立，膝伸直。
腿伸向後，返回原位。
備記：不要向前。

EXTENSION
Stand Inside The Bars. While Holding On To Bars, Bend Slightly At The Knees. Lowering Your Feet. Do Not Squat Fully. Lowering Feet With Thighs And Do Not Allow Knees To Turn In Or Out.
雙手扶穩平行木，雙膝微彎下蹲，膝蓋、腳趾與視線成一直線。

EXTENSION
Stand Inside The Bars. While Holding On To Bars, Bend Slightly At The Knees. Lowering Your Feet. Do Not Squat Fully. Lowering Feet With Thighs And Do Not Allow Knees To Turn In Or Out.
雙手扶穩平行木，一腳向前伸，腳伸直，身體慢慢向前移，到後腳小腿有拉緊感覺，10秒，換腳重做。





MASTER PLAN FOR AGING PRINCIPLES

Emerging directly from the voices of real people, the Master Plan for Aging Principles articulate the highest levels of insights. While the sentiments expressed may not seem new or revolutionary, these six principles are significant enough to be reiterated, stated explicitly, and overlaid into recommendations for the master plan. They continue to underscore the need for a comprehensive plan that is grounded in the lived experiences of all Californians.

01.

Reframe the narrative to focus on aging as a universal experience.

The current societal conversation around older adults continues to create uneven power dynamics, singling out older adults as a separate group. Rather than focusing on older adults as a category, shift the conversation and awareness to be more broadly about aging, a process that everyone undergoes.

“

The solutions that come out of this Master Plan for Aging are going to trickle down and impact all generations of Californians, all of our communities.”

— Mark Ghaly, Secretary, Health and Human Services Agency

02.

Integrate aging into all systems and agencies, rather than keeping it siloed.

Aging is ubiquitous. As such, the issues that are inextricably linked to aging should be integrated at a systemic level across agencies and service providers.

“

This is a once in a generation opportunity to make a difference here in California. This is not just about older people and some institutional form of care, that sort of narrow 1960s or '70s visual of aging. This is how aging touches all of public policy...It is about thriving in community.”

— Dr. Bruce Chernof, President and CEO of The SCAN Foundation

03.

Recognize and address the impact of identity factors such as race, gender, ability, economic status, and sexual orientation in all efforts.

Identity factors can profoundly impact the quality of life for older adults, many of whom have accumulated years of discrimination and emotional abuse and continue to face it as a result of who they are. These inequities need constant consideration and reconciliation.

“

I had three strikes against me: I was a woman, I was black, and I was lesbian. And the first two, I couldn't hide. So if I was playing baseball, I would never make it to first base, I had three outs, I was out right there.”

— Jonnette Newton, Older Adult (Alameda County)

04.

Efforts related to older adults and people with disabilities should be done in tandem with one another.

The needs of older adults and people with disabilities are often very similar, yet efforts are siloed. To streamline and create efficiencies in service provision, policymaking, and access to programs, care for both populations should be managed through similar, holistic, systems-based approaches.

“

I think the key to developing the Master Plan for Aging with a disability lens is to be person-centered. One of the things I've spent my career advocating for are those services that see us the way that we see ourselves.”

— April Wick, Disability Advocate (Sacramento County)

05.

Develop policies, programs, services, and tools rooted in on-the-ground realities.

The people setting regulations and policies are often not the ones directly impacted by them. Rather than making assumptions and taking a top-down approach to solutions, identify the needs of the end-users to develop sustainable solutions that truly work for them.

“

I often sit down when we're doing something, and think, 'who thought of this?' You know like when they implement something I'm like, 'that doesn't make any sense for the family.' And I'm just like, 'who thought of this?' I wish they could see and hear the stories.”

— Natalie Franks, Social Service Provider (Orange County)

06.

Take a personalized and culturally sensitive approach to solutions, rather than a “one size fits all” application.

Many programs and services are designed to be universal to serve the widest array of people. In doing so, older adults are thought of as a monolithic group, but there is, in fact, great diversity among them and their experiences. Given the distinctions between abilities, preferences, needs, and varied backgrounds, solutions also need to be diverse.

“

When we think of older adults, we lump them into one bucket rather than identifying groups — active older adults, aging older adults and frail-elderly adults — we put our efforts in one category and the others don’t get the attention they need.”

— Karyl Dupée, (Attendee, Orange County Community Design Workshop)





IMPLEMENTATION

IMPLEMENTATION CONSIDERATIONS:

When going through the concepts under each strategy, you might consider the following questions around implementation of the ideas:

- » Which group(s) should be involved in the implementation of this idea?
- » Are there any groups or individuals that already have the resources to bring to this effort?
- » What funding streams are available or need to be made available to pay for implementation?
- » What will be the barriers and challenges to implementing this idea and how can they be overcome?
- » How long will it take to start implementation of this idea?
- » What metrics might be used to measure the impact of this idea?

IMPLEMENTATION GROUPS:

In order for the Master Plan for Aging to be implemented successfully, ideas will need to be executed across a number of entities. No one group will have the power, funding, or capacity to deliver all of the suggested outcomes; therefore, collaboration among multiple sectors, entities, and even individuals will be of utmost importance. The following are some of the entities that have been identified as critical to implementing the Master Plan for Aging.



GOVERNMENT AGENCIES

This includes agencies at the federal, state, and local levels. This group is critical to leading initiatives, particularly where legislative action is required.



PHILANTHROPIC FUNDERS

This includes community foundations, charitable trusts, and endowments. This group can support implementation by funding research as well as projects, programs, tools, and services.



SOCIAL SERVICE PROVIDERS

These include individuals and organizations (public, private, or non-profit) that provide a range of programs and resources. Because social service providers are often on the frontlines and are deeply impacted by policies and programs, they need to be engaged, in particular, around strategies that impact the services they offer.



HEALTH CARE PROVIDERS

This includes health care organizations such as hospitals and assisted living facilities, health care staff such as doctors and nurses, as well as health insurance providers. This group can make changes within their own internal policies and practices, creating systems-level change while also affecting change through services, projects, and tools.

**EDUCATORS AND RESEARCHERS**

This includes educational institutions such as schools and colleges, researchers, as well as individual teachers and administrators. This group can deliver services and projects and also contribute to the currently limited body of data around aging.

**NEIGHBORHOOD DEVELOPERS**

This group includes people working in community development such as architects, planners, builders, and developers. Decisions by these individuals can deeply impact where a person lives, how they get around, and their overall quality of life.

**BUSINESSES AND ASSOCIATIONS**

Businesses and associations can include a range of groups from large corporations to small, local businesses with the power to make changes within their own organizations to support aging populations. These groups can advocate and impact change within their own organizations while also creating services and tools that positively impact the experience of aging.

**FAITH-BASED ORGANIZATIONS**

Not only do faith-based organizations provide a sense of community and contribute to positive social and emotional health, but many faith-based organizations also provide programs and services. There are many opportunities for these groups to make changes within their own offerings, but also to take a more holistic approach by partnering with other organizations.

**COMMUNITY MEMBERS**

This is the broadest group of leaders and includes any individual that is looking to start a project, run a program or service, or develop tools that bring positive changes to their own community. While individuals might feel limited in their capacity and power, they can advocate on behalf of older adults and people with disabilities, add their voice to critical decisions, and even start initiatives independently or with groups of other individuals.

WHAT CAN YOU DO?

Creating a California where all people can age with dignity will require the participation and collaboration of all Californians.

HERE ARE SOME OTHER WAYS YOU CAN HELP

IF YOU ARE PART OF AN ORGANIZATION:

STAY ENGAGED

Stay engaged in the conversation! Visit the [Together we ENGAGE](#) website for updates and submit your Pledge for Action.

MAKE CHANGES INTERNALLY

Learn about other organizations, in particular the [regional coalition](#) serving older adults and people with disabilities in your area, and where there might be opportunities for collaboration.

FORM PARTNERSHIPS

Learn about other organizations serving older adults and people with disabilities and where there might be opportunities for collaboration.

ADVOCATE FOR OTHERS

Advocate for the rights of older adults and people with disabilities through local advocacy organizations and local and state legislative offices.

IF YOU ARE AN INDIVIDUAL COMMUNITY MEMBER:

STAY ENGAGED

Stay engaged in the conversation! Visit the [Together we ENGAGE](#) website for updates and submit your Pledge for Action.

ADVOCATE FOR OTHERS

Advocate for the rights of older adults and people with disabilities through local advocacy organizations and local and state legislative offices.

VOLUNTEER YOUR TIME

Learn about organizations, in particular the [regional coalition](#) serving older adults and people with disabilities in your area, and how you can be involved with them.





I'd like for everyone to feel safe to grow in this, the richest country in the world and feel like as you age, you can age in place, you can age with proper health care. You can age with the things that are just basic tenets to life, things that we all should have."

— Gwen Boozé, Older Adult (Alameda County)

This report is a result of collaboration between The SCAN Foundation and Greater Good Studio, a strategic design firm focused on advancing equity, with significant input from a range of stakeholders.

Supported by a grant from The SCAN Foundation — advancing a coordinated and easily navigated system of high-quality services for older adults that preserve dignity and independence. For more information, www.TheSCANFoundation.org

**Greater
Good
Studio**



Several Regional Coalitions throughout the state — in Los Angeles, Orange, Nevada, Alameda and Kern counties — have served as active thought partners throughout this process, sharing their expertise, connecting key stakeholders to this work, and hosting local events.



Senior Services Coalition of Alameda County
AGING IS SOMETHING WE ALL HAVE IN COMMON

**Orange County
Aging Services
COLLABORATIVE**



