

Aging Futures

. . . older adults living well
as they define it.

Community Planning Forum Report

2003

A Community Partnership for Older Adults Project

A National Program of The Robert Wood Johnson Foundation

Aging Futures Partnership
Broome County, New York

Our Mission

*Creating and strengthening community systems,
thus enabling persons age 60 and over to maintain
the highest quality of life.*

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About the Partnership

“The beauty of collaboration is the acknowledgement that each organization has a special function, a power that it brings to the joint effort. At the same time, each organization provides valuable services or products critical to the health of its community.” (Winer Collaboration Handbook: Creating, Sustaining, and Enjoying the Journey, 1994)

Since 1989 Broome County has benefited from a dedicated Partnership of consumers, educational institutions, public and private and not-for-profit agencies and faith communities dedicated to enhancing the quality of life for seniors in Broome County. Aging Futures demonstrates their commitment to strengthening Broome County’s long term care system by:

- Engaging seniors, listening to their needs and including them in planning processes
- Promoting the independence of seniors
- Building and supporting a responsive long term care system

Broome County was one of 13 communities nationwide to receive a planning grant from The Robert Wood Johnson Foundation, as part of their Community Partnership for Older Adults initiative. The grant, awarded in August 2002, supported our local Partnership in coordinating a planning process to meet the needs of vulnerable elders and their caregivers in Broome County.

Aging Futures Partnership goals:

- Strengthen a long standing and diverse Partnership focused on long term care services and supports
- Understand local needs, prioritize action steps and act collectively to address them
- Develop strategies that will bring about change in both practice and policy
- Secure funding and evaluate our efforts
- Support and coordinate community education about senior issues

INTRODUCTION

The following report summarizes the Community Planning Forum sponsored by the Aging Futures Partnership on September 29, 2003. The forum was part of an 18-month community planning process coordinated by the Aging Futures Partnership. The extensive planning process was primarily supported by resources from The Robert Wood Johnson Foundations' Community Partnership for Older Adults initiative. The forum was the second in a series intended to move the community forward in developing a *Broome County Strategic Plan for Long Term Services and Support*.

Seventy-four community representatives including not-for-profit/private-for-profit agencies, faith-based agencies, educational organizations, and consumers, participated in this second planning forum held at the State Office Building in Binghamton, New York. These individuals are part of a long-standing collaborative project – Aging Futures, which is “dedicated to enhancing the quality of life for the aging population” in Broome County.

This report has four sections. The **Introduction** summarizes the overall objectives of the Forum, and places the event in context of other work of the Partnership. The **Methodology** section documents the process used at the forum to stimulate discussion and support collaborative planning on behalf of Broome County seniors. The **Major Themes** portion documents issues that were considered cross-cutting for each topic area addressed. The **Focus Group** section summarizes the findings of six roundtable discussions that were featured at the planning day. Recommendations are offered to ensure that the community moves forward with planning that supports quality of life for seniors in Broome County. The recommendations address senior needs for home modification and housing, wellness, transportation, mental health support and legal and financial planning. Three other issues have previously been addressed through the Aging Futures Partnership and strategies to address those areas are not included in this report.

METHODOLOGY

The main objective of the fall Planning Forum was to promote community dialogue about issues critical to seniors. The forum was designed to build on the Partnership's progress in the areas of data collection, community prioritization and strategy development.

In March of 2003 the Partnership hosted an initial Community Data Forum. The forum held on September 29 built on this previous community event. The first forum several highlighted data that was gleaned from qualitative and quantitative research conducted locally. Participants were then asked to share their thoughts about the data presented. The 110 participants broke into 12 small groups and responded to the following questions: *What did you hear? What do you think is most important? What else should we consider?* Participants discussed their responses in small groups and then reported out to the larger group. This resulted in 32 issue statements. (See appendix B). The issue statements were projected on a screen and reviewed by the forum participants. With the

aide of an IBM groupware consultant and software, the AF core committee members reviewed the comments to identify groupings and the 32 issues were collapsed down to 9 critical areas.

The Partnership then coordinated a survey process, conducted via the mail and *Senior News* publication, where local seniors and their caregivers prioritized the 9 critical areas. The top three areas of concern were chronic disease management, caregiver support and education and social connections for seniors.

These issues were addressed by three workgroups, made up of 64 community members, who met 5 times each over the summer to discuss and develop strategies intended to support community response to these issues. These recommendations are now available to be put forth in grant proposals and used by numerous organizations to support planning and program development.

The purpose of the September forum was to address the remaining critical areas identified through the community prioritization process: housing, transportation, mental health and financial and legal planning. During the planning process for the Forum, it was decided to add a sixth critical area, wellness. Participants were welcomed by Kathy Bunnell, Aging Futures Chairperson, who provided an overview of the forum objectives. Karel Kurst-Swanger, Ph.D., a consultant to the Broome County Integrated County Planning Team, then introduced the activities and process that would be used throughout the day to support planning. To stimulate thought and to ground discussion, DeeDee Camp, Project Manager for Aging Futures, presented a Power Point presentation which highlighted data on the areas being explored at the forum.

Roundtables:

- “Staying where you are: Home modification and repairs”
Moderator: Gail Reeder, Consumer Advocate

- “Making a move: Finding appropriate and affordable housing”
Moderator: Betsy Kelchner, Binghamton University
School of Social Work

- “Transportation planning: Maximizing coordination and safety”
Moderator: Kathy Gitto, RSVP Executive Director

- “Imperative legal and financial planning”
Moderator: Al Kukol, Levene Gouldin & Thompson, LLP

- “Mental health in the senior years ”
Moderator: Dr. Neil Hall, Clinical Campus

- “Well Seniors”
Moderator: Neil Eldred, Deputy Director B.C. Office for Aging

Moderators, selected for their knowledge and facilitation experience, led 90-minute solution-focused discussions. Each group was asked to respond to 3 key questions in regard to their topic.

1. *What are the primary issues about their topic?*
2. *What are the community priorities in this area?*
3. *What strategies and action steps should be taken by the Aging Futures Partnership and other community stakeholders to address this area and promote quality of life for seniors?*

Roundtables included approximately 12-15 persons. All of the roundtables, except transportation and housing, included consumer participation. Dialogue resulted in identification of concrete, “doable” tasks and recommendations for community action. After lunch, a representative from each roundtable session reported out to the full group the discussion and recommendations made by their group. (See Results Section).

To conclude the day, Karel Kurst-Swanger highlighted key themes identified by all of the roundtable groups. The themes will impact recommendations and future activity.

The discussion and recommendations will be reflected in the *Comprehensive Community Strategic Plan for Long Term Care Services*. The *Plan* will guide the work of the Aging Futures Partnership for the next several years. The *Plan* will also be used by agencies, community groups and other community members to guide their planning and to establish a direction for community activity. Partnership members will work together on activities within the plan that are intended to promote systemic change. The *Plan* should also assist organizations in securing funding for new initiatives.

RESULTS

What follows is a summary of the various roundtables discussions and recommendations made by community members to improve the quality of life for the aging population in our community. Each summary includes information about 1.) Issues discussed at the roundtable, 2.) Priorities identified by the group, 3.) Recommendations for Community Action, (including information on what questions and data remain outstanding) and 4.) The role of the Aging Futures Partnership in advocating on each particular issue.

It is recognized that all of these issues warrant additional discussion and that additional time is needed to more fully develop local strategies and response. However, the forum was a catalyst for supporting community dialogue, stimulating ideas, developing teamwork that will support true systems change.

ROUNDTABLE DISCUSSION SUMMARIES

Home Modification and Repairs: Staying Where You Are

Issues Discussed: Seniors have clearly indicated that they wish to remain in their own homes. Home modifications can enable seniors to do this for a period to time; however, they may avoid making changes because of a lack of information, a concern about how changes can be accomplished, and uncertainty about costs and arranging for them. Information on how the issue can best be presented to seniors will assist community agencies to provide education and information as well as recognize the barriers seniors feel. Equally important is learning what motivates a senior to make this type of change.

While modifications will make a home more accommodating in later years, it is equally important to address safety and energy issues. Good energy information that can reduce the amount of dollars being spent by seniors is available; however, programs that support this concern seem to come and go. The group felt that reinstating energy audits is important. They also felt that instituting a safety audit is equally important and that perhaps these two might be combined. Falls in the home due to throw rugs or poor lighting are just one example of what can lead to a broken hip and all the attendant life changes.

Accomplishing small home repairs is another component of enabling people to remain in their homes. Because the housing stock of Broome County is old, repairs are frequently needed and elders frequently are unable to make them. Un-addressed repairs can grow into much larger repairs and lead to safety issues. Knowing who can help, how much it will cost, and supervising repairs is a process some seniors may defer due to a lack of confidence, knowledge or funds.

Priorities Identified and Recommendations for Community Action: A number of activities arose from the discussion. They are:

- Service providers need to learn motivation techniques and educational designs that will encourage action on making changes in the home that will enable an older person to continue living there.
- Provide information on the importance of keeping homes in a livable condition and the positive impact of home modification.
- Support re-habilitation of older homes through collaboration between contactors, outside agencies, media and volunteers.
- Coordinate a volunteer home inspection process that addresses energy issues such as outdated wiring and insulation and safety issues such as throw rugs, poor lighting, and stairs without railings. Formation of a task force would be a first

step to explore partnerships and funding. Volunteers could be trained to do audits. In rural areas explore the feasibility of linking with fire personnel or other community groups.

- Coordinate a home repair service that supports the elder to negotiate with contractors and to develop a trusting relationship with them.
- Provide education and literature about home modifications and repairs and distribute how-to information.
- Develop a “show” house that has been modified to be elderly-friendly and conduct tours. The modifications and new ideas will demonstrate how older homes can become safer and accommodate aging. (Target audience – those who can afford modifications. An entrance fee could be charged.)
- Develop section at the county’s annual home show featuring safe bathrooms, kitchens, and lighting that is available. Establishing a partnership between contractors and agencies to accomplish, promote and staff.

Future considerations and questions for the community to consider:

- Do builders have current and needed information on modifications and safety considerations?
- Are for-profit builders interested in or concerned with planned modifications? What are their questions and needs?
- Do contractors have an interest in partnering with community groups to advance this issue?
- What is the potential to develop a service that would provide elders assistance to develop a plan for repairs, assist in the contracting process and monitor the work? Explore funding and the potential of “for fee” service as well as an increased subsidized low-income program.

Finding Appropriate and Affordable Housing: Making a Move

Issues Discussed: Broome County is fortunate to have a variety of housing options for seniors. Written materials on housing options are available; however, it is difficult to access up-to-date waiting list information for each facility. A significant waiting list is reported for assisted living facilities. Affordability is also an issue.

Broome County has several unique housing opportunities. For example, the students attending colleges in the area could enter into an intergenerational housing option where university students share housing with elders. It was also noted that grandparents raising grandchildren have unique housing needs.

When strategies are being developed for improved senior housing options the needs of seniors with low to moderate income need to be considered. New payment options might include exchange of services for rent. Both renovation of existing buildings and new construction of housing opportunities should both be considered. Housing education should address a variety of issues, including social issues such as the “interdependence” of family and friends.

Priorities identified and recommendations for community action:

- Develop a single application form for various housing options (from long-term care facilities to apartment programs) to ease the application process for seniors and their families and for housing programs.
- Feature information about personal planning for housing needs at events that attract seniors.
- Collect waiting list information or support community process for maintaining a central waiting list for senior housing.

Future considerations and questions the community wants to consider:

- Establish process for securing more specific information regarding the housing needs of middle-income seniors?
- What else does the community need to know about respite homes or interim housing?
- What is the extent of both rural and urban homelessness among seniors?

Transportation Planning: Maximizing Coordination and Safety

What are the Issues? The Broome County Elder Services Guide features eight different transportation services that are available to support senior independence. Community education efforts on transportation options are an on-going need. It was reported by service providers at the forum that most services are well utilized and that referral processes are working well. Public transportation currently has some additional capacity. As the senior population grows, and more seniors choose not to drive, we will need more transportation capacity. Coordination between the various service providers also supports an efficient community-based system. Participants felt community coordination efforts were working but continual improvement is a worthwhile goal.

Seniors are interested in escort and companion service for medical transportation and additional on-demand transportation. An on-going relationship between a senior and a transportation provider seems to impact utilization in a positive way. In other words, a senior may be more apt to use a transportation service when they know the driver or feel confident about the service. Additional information about consumer needs and preferences is needed. Consumer involvement is vital to the planning process. Consumer input would help answer questions, such as:

- What supports do seniors need regarding transportation issues?
- How can we support the caregivers who provide transportation?
- What motivates seniors and their families to utilize transportation options?
- What are the barriers, and how can they be overcome?

The group also reviewed and discussed the status and viability of recommendations included in the *Senior Transportation Task Force Report of 2000*. Those recommendations addressed rural transportation, volunteer transportation and public transportation. A few of the recommendations from the 2000 report were implemented. RSVP initiated a Transit Coach Program. The project is small but meets the needs of several elders. The *Elder Services Guide* was also updated and the on-line version of the Guide provides up-to-date information about transportation services. It was noted that there is not a group or agency that is currently leading or coordinating the remaining recommendations of the report.

Priorities identified and recommendations for community action:

- Coordinate a mechanism for consumer perspective to be incorporated into transportation planning.
- Continue to support public education efforts about available services, how to access services, and other important transportation related issues including senior driver assessments, safety, etc.
- Evaluate feasibility of a private senior transportation company to facilitate additional capacity.

- Quarterly meetings to provide an opportunity for exchange between public/private providers. Key players could meet together periodically to assess need, capacity and new opportunities.

Imperative Legal and Financial Planning

Issues Discussed: Legal and financial planning can be complex. Community stakeholders, including doctors, agencies, family members, churches, friends, neighbors, and service clubs, need to work together to provide reliable information and to motivate seniors to take action. Sources of reliable information include: Broome County Bar Association, Martindale-Hubbell, Certified Financial Planners and Certified Elder Law Attorneys. Legal Aid for Broome & Chenango is also an excellent resource and they may/will be instituting a free “legal line” in the future.

Seniors face unique barriers when addressing their financial and legal planning. Many seniors are not aware of services available to assist with legal and financial planning. It is important to seek out unbiased information and not to base decisions on one-sided legal seminars.

Adult children are more apt to be involved in health care planning issues than they are financial planning. Some forum participants noted that there is still a cultural bias against joint control of finances.

Priorities identified and recommendations for community action:

- Make a strong effort to get the message out that the Office for Aging Senior Help Line is the first place to call for information.
- Encourage all adults to plan early. Encourage both spouses to be involved in planning.
- Produce video-tape testimonials of consumers who articulate the positive effect of their decision to make healthcare and legal plans.
- Ensure that education programs that promote pre-planning, record retention and healthcare planning are offered in many communities at minimal cost. Free food and free seminars are wonderful motivators; however, participants need to take action.

Mental Health in the Senior Years

Issues discussed: The elderly face unique challenges in regard to maintaining mental health. Health problems, family changes and isolation leave seniors more vulnerable to depression. We need to pay special attention to suicide, the stigma attached to mental health issues, and communication techniques. Service providers, agencies, consumers, and the general public can all benefit from additional training and education about mental health in the senior years. Forum participants expressed a desire for affordable and accessible case management services that would assist seniors to maintain their mental health.

Priorities identified and recommendations for community action:

- **Community awareness and education:** Education targeting community agencies, professionals, consumers, and caregivers is needed. Medical providers, who are often held in high esteem by seniors, should encourage seniors to seek support for mental health concerns. Partnerships between medical providers and mental health providers are critical.
- Develop a community outreach plan, utilizing media, face-to-face education, and the Internet to promote a better understand of senior mental health issues including: isolation, loss of independence, suicide, medical challenges, sensory deficits, euthanasia, dementia and family conflict.
- Additional local community assessments should be conducted. Typically community assessments reflect service utilization and we are still relying primarily on national data to determine local need.
- Write grants to acquire funding for programs and document successes that could result in political and policy changes.
- Market concept of case management services, including a clear definition of case management.
- Take advantage of in-home nursing assessments to include mental health concerns.
- Promote awareness of referral process, especially by caregivers.
- Support partnerships between providers, outside agencies, and the elderly and their families.
- Develop or utilize curricula that support medical providers and other community members in discussing, identifying and referring seniors to mental health supports.

Well Seniors

Issues Discussed: The well being of an elderly person is dependent upon a variety of community factors including: access to health care, transportation, social supports, personal income, and housing. Personal factors such as their ability to care for themselves, resiliency, and outside interests and hobbies also have an effect on wellness.

Broome has many community assets such as parks, senior centers, malls, colleges, churches, transportation services, education programs and materials (including the *Elder Services Guide*), cultural and art activities, recreational activities, and quality medical services.

Wellness can be inhibited when a senior has declining mobility or is impaired by other health conditions. However, it is important to recognize that an illness can also motivate a person to make changes that support wellness. For instance the knowledge that one has high blood pressure may motivate someone to exercise and eat better. Poor weather conditions can also limit senior participation in community activities, as can limited financial resources. Broome seniors have been impacted by economic decline and family members leaving the area. It is also assumed that as seniors age, isolation can become more common.

The community can assist the elderly in staying well by doing simple things that enhance quality of life. Broome promotes awareness of resources, but it is critical to maintain outreach and begin reaching the more isolated seniors. It is important for the community to understand some of the natural limitations that occur due to aging and to recognize the adjustments that need to be made. Service providers could also benefit from a better understanding of the different ethnic and cultural backgrounds that make up our community. Seniors and the community at large need to work together to ensure that each senior has a support system in place.

Priorities identified and recommendations for community action:

- Focus on key community messages
- Encourage seniors to make small changes and to keep building on small successes.
- Organize focus groups/identify what people need and want.
- Identify community teams to work on the issues and to maintain community focus and interest
- Evaluate our efforts and build linkages with research branches.
- Engage creative problem solvers and community leaders.
- Obtain resources to fund programs
- Advertise and promote awareness of what is available, making sure that seniors have access to reading materials, educational opportunities, exercise options and social opportunities that support wellness.

- Consider the physical /emotional /social / intellectual / and spiritual needs of seniors.
- Aging Futures can form a group of committed people, including a variety of stakeholders such as government representatives, private and not-for-profit agencies, consumers, and medical professionals to continue wellness planning. Also, Aging Futures can link with other groups already working in this area.

MAJOR THEMES

As the forum participants discussed the critical issues, several themes seemed to emerge. These themes should be considered when making recommendations and in future planning.

- The rapidly growing elderly population demands a greater sense of urgency in planning and instituting strategic change.
- We have strengths in our community that will assist us in meeting the needs of the senior population.
- There is a need for increased community awareness about senior issues and services.
- Consumers deserve education and pre-planning support in a variety of areas. Inspirational workshops and programs are one strategy to motivate and support older adults to make changes.
- Education will be enhanced by strengthening outreach and communication among diverse groups of professionals and community leaders including fire personnel, police, public and private contractors, and private industry.
- Our oldest seniors could benefit from more one-on-one assistance. The need for more case management services is evident.
- We need to keep the contribution and needs of caregivers in mind.
- Intergenerational activities can be a strategy used to enrich the community and address senior living conditions.
- The community needs to obtain additional funding when appropriate and also educate consumer on how to best use their own financial resources.
- There is a place for everyone in the Aging Futures Partnership.
- Advocacy is critical.

CONCLUSION

The Aging Future Partnership supports a continuous planning process that assists Broome County in responding to seniors' needs and preferences. The projects and activities of the Partnership evolve over time, but our vision of seniors living well as they define it – remains constant. The dialogue at the forum resulted in recommendations that will mobilize the community and move us forward. The community is encouraged to respond to needs that have been identified and to build on the strategies that were suggested.

The recommendations within this report will become part of the Broome County Strategic Plan for Long Term Care Services. Over the next several years, the plan will guide the work of the Partnership and assist us in determining priorities and maintaining a focus on these issues.

The activities of the Partnership will change over time, but the benefit of a community-based Partnership is that there is on-going dialogue and information flowing about emerging needs and trends. The Partnership supports education and professional skill-building in the area of senior planning and supports coordination between community stakeholders. The Partnership will offer a neutral and open table for planning. The Partnership will offer leadership when needed and demonstrate effective advocacy.

The willingness and enthusiasm of community members to participate in a community forum about senior issues demonstrates Broome County's strong commitment to enhance the quality of life for our elders. Aging Futures is pleased that numerous persons who are not members of the full Partnership were able to attend this forum and to participate in our strategic planning efforts. The Partnership is committed to an inclusive planning process and is particularly committed to consumer involvement. From the beginning, the Aging Futures Project has recognized elders and their caregivers as the primary source of information in regard to senior planning. The evaluations indicated that participants welcomed the opportunity to take part in "big picture" planning and Aging Futures will continue to support collaborative planning. We recognize that the inter-relatedness of the issues supports joint planning and that forums promote community understanding that is needed to respond to complex and challenging issues.

The Partnership thanks all those who participated in the forum and welcomes feedback on the contents of the report.

**Registrants to the
September 29, 2003 Forum**

Diane Albrecht
Roz Antoun
Donna Bates
Julie Baumgart
Michelle Berry
Peg Blackman
Kathy Bunnell
DeeDee Camp
MaryAnne Carasea
Joye Clairmont
Lillian Cohen
William Coles
Shelli Cordisco
Marybeth Corwin
Kathy Cramer
Jeff Davis
Doris DiRado
Lucy Dirlam
John Dubay
Tommye Durham
Joan Eisch
Neil Eldred
Ruth Ferrari
Donna Gavula
Kathy Gitto
Jim Hackford
Dr. Neil Hall
Judy Harley
Laura Henry
Tammy Hodges
Linda Hoke
Teresa Holler
Erik Jensen
Paula Joyce
Stacey Kalechitz

Sally Kastl
Joanne Kays
Betsy Kelchner
Al Kukol
Nancy Kumrow
Karel Kurst-Swange
Greg Laskowski
Annette LeRoy
Bernard Levy
Marie Liberati
Anne Linn
Rosemary Mahon
Colleen Marascia
Ann McNichols
Joan Mitchell
Mary Normile
Tammy Patak
Benay Pate-Rodrigue
Sharon Phipps
Jeanne Randall
Gail Reeder
Laura Rhinehart
Richard Rogers
Kathy Scrivener
Susan Secky
Conant Smith
Debbie Thorpe
Deb Totten
Marian Towers
Janice Ulangca
Annie VanderWal
Marcia Ward
Mary Jayne Westbrook
Judy Whiteman
Jerry Willard
Sandra Williams