

Aging Futures

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

Strategic Plan January 2004

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)

The Aging Futures Partnership (Partnership) has been dedicated to enhancing the quality of life for seniors in Broome County since its inception in 1989. The group is composed of consumers; educational institutions; faith-based organizations; and a variety of public, private, and not-for-profit agencies. The Partnership demonstrates its 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 its Community Partnership for Older Adults initiative. The grant, awarded in August 2002, supported the Partnership as it coordinated a planning process focused on identifying 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, identify and prioritize action steps, and act collectively to address the needs
- Develop strategies that will bring about change in both practice and policy
- Secure funding to advance the Partnership’s strategies
- Evaluate the Partnership’s efforts
- Support and coordinate community education about senior issues

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Introduction

Broome County is a community increasingly rich in older adults. The 2000 Census revealed that one in five residents is age 60 or older. The number of elders in our community is growing, with the oldest of old -- those aged 85 and above -- experiencing the largest growth. The community is faced with the need to support an elderly population whose care needs range from the simple to the complex. To meet these needs, Broome County is developing an integrated long term care system that improves the quality of life for all elders by increasing their vitality, improving their health and supporting them in their preferred living environments.

With funds provided by The Robert Wood Johnson Foundation, the Aging Futures Partnership has assessed the needs of Broome County's elderly, identified the issues that older adults view as priorities, and outlined a strategic plan of action to address these priority needs. In performing these activities, the Partnership has placed an emphasis on obtaining information from seniors, from caregivers and from those receiving care.

The Partnership has a vision of Broome County as a community that sees "Older adults living well...as they define it". To realize this vision, the 55 individuals and organizations that comprise the Partnership have the mission of creating and strengthening community systems to enable persons age 60 and over to maintain the highest quality of life.

This strategic plan outlines a set of goals and objectives that will help older adults retain their independence. The plan focuses on the ten issues that seniors identified as the most important, and uses the expertise of the community to establish the specific action steps that will result in a long term care system that is responsive to those who use it. The Aging Futures Partnership is working to assure that our community meets the long term care needs of our seniors in a system that will evolve as these needs change.

Executive Summary

Broome County seniors have overwhelmingly expressed a desire to remain independent as they age. For older adults to *live well as they define it*, our community must ensure that there is a comprehensive array of services in place that will provide seniors with the options that will allow them to live as they choose. In order to do this, long term care services for seniors must be integrated into a delivery system that improves the quality of life for frail elders by working to increase their vitality, improve their health, and support them in their preferred living environments. The members of the Aging Futures Partnership have committed to working together to realize systemic change in the local long term care delivery system.

Through the community planning process funded by the Community Partnerships for Older Adults initiative of The Robert Wood Johnson Foundation, older adults and service providers in Broome County have identified ten priority concerns that affect their ability to remain independent. The issues are:

1. Caregiver Support through Transitions
2. Managing Chronic Illness
3. Staying Socially Connected
4. Understanding and Accessing Services
5. Home Repair and Modification
6. Finding Affordable and Appropriate Housing
7. Legal and Financial Planning
8. Maintaining Health and Wellness
9. Mental Health
10. Transportation

This plan represents the community's response to these ten issue areas. The goals and objectives outlined are the shared vision of consumers and service providers who worked in concert to produce this plan. We desire a community that has systems and supports that promote well being, maximize independence, and minimize functional decline and its effects in the vulnerable elderly population. The plan reflects the Aging Futures Partnership's belief that the long term care system must be responsive to the needs of consumers and offer them choices for their care.

The process that has been undertaken has allowed the Partnership to support community actions by supplying data, communication assistance, and professional education. Partnership members, as well as others, are encouraged to respond to these concerns by pursuing the objectives listed for each of these issues, enhancing their current programs, pursuing grant funding, and strengthening linkages among members.

Goals and Objectives

The goals and objectives identified in this plan are the outcome of an 18-month community wide planning process aimed at addressing the needs of Broome County seniors. Eight of the ten issues for which strategies are outlined were identified at a forum in March of 2003. Seniors, caregivers, service providers, and practitioners attended this forum that was open to the community.

The forum highlighted data from locally conducted qualitative and quantitative research. Participants were 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?* This resulted in 32 issue statements. With the aid of an IBM groupware software and consultant, the Aging Futures Partnership core committee members reviewed the comments to identify subject groupings and the 32 issues were collapsed down to eight critical areas.

The next step was a survey of Broome County seniors and their caregivers. The survey respondents were asked to rank the critical areas in order of priority. The top four concerns were caregiver support through transitions, managing chronic disease, staying socially connected, and understanding and accessing services. In the summer of 2003, three workgroups helped the Partnership develop strategies to help the community respond to the first of these three issues. The fourth issue, understanding and accessing services, was discussed in each of the three workgroups as an essential part of their topic areas. In addition, a member of the Aging Futures Partnership also pursued and received grant funding to support efforts to educate seniors and their caregivers about services.

A second forum was held in September 2003 to address the remaining concerns that had been identified through the community prioritization process: home repair and modification, finding affordable and appropriate housing, legal and financial planning, and transportation. Concerns from the community prompted the addition of two additional topic areas: mental health and maintaining health and wellness. Forum participants joined the roundtable discussion on the topic that they found most important. Each group was asked to respond to three key questions in regard to their topic. *What are the primary issues about this topic? What are the community priorities in this area? 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?* The roundtable discussions identified concrete recommendations for community action. The results of these discussions are presented below.

Partnership members and other interested community members are encouraged and challenged to use the objectives below to:

- Create an increased awareness of aging issues and services as well as to educate Broome County residents so that they become more knowledgeable consumers of long term care and also more effective decision-makers;
- Develop the resources necessary to ensure improvements in long term care and supportive services across Broome County and evolve a comprehensive and integrated long term care system;
- Improve access for older adults to Broome County long term care and supportive services by increasing communication and coordination between the health care, mental health care, long term care and supportive services providers;
- Improve the quality of life and quality of care for older adults in Broome County and for their caregivers by enhancing the available care choices and decision-making tools for older adults.

The objectives identified for each issue have been grouped into short, intermediate, or long-term objectives for the Partnership. Short-term objectives will be accomplished in the next two years. Intermediate objectives will be accomplished in three to four years. Long-term objectives will be completed in five or more years.

Critical Issues

1) Caregiver Support through Transitions

Seniors often need assistance to remain independent. While some seniors pay someone else to do the tasks they can no longer do themselves, most rely on informal and unpaid assistance. Informal caregivers provide the majority of personal care and household assistance consumed by America's elderly.

Of all American households, 23% include one or more people who are providing unpaid care for an individual age 50 or older. In Broome County, the number of households with an unpaid caregiver is estimated at 18,917. These informal caregivers help frail elders remain in the home of their choice. Informal caregivers are the foundation of the long term care system. Supporting seniors who need long term care also means supporting the caregivers who make it possible for them to continue to live as independently as possible.

Many caregivers (64%) are employed outside the home; 52% of the caregivers are employed full time. Caregivers are more likely to have physical and mental health problems than individuals who are not caregivers. Both hypertension and depression are more common in the caregiver population. In the last decade, Broome County has experienced a decline in the under-60 population as the workforce has left the area in search of employment. The out migration of adult children is a concern to service providers, since adult children commonly serve as caregivers when needed. The absence of adult children from the Broome County area will likely have significant caregiving implications. A sizeable 56% of vulnerable seniors in Broome County reported that they would not be able to afford to pay \$100 per week for care.

Providing support for caregivers is an important component in ensuring that frail elders are able to retain their independence.

Goals

A) Caregivers of the frail elderly are supported by the community in their efforts to keep care receivers at home; community resources are targeted to sustaining care receivers in the least restrictive environments.

Objectives

Short-term Objectives

- Enhance the supports available to the caregivers of Broome County seniors to include education, advocacy, and various levels of case assistance with a focus on helping caregivers through periods of transition.
- Partner with local hospitals by developing the *Returning Home* pilot to assist caregivers when the care receiver is at a point of transition.
- Coordinate enhanced caregiver education.
- Expand the capacity of services through coordination of a volunteer component for the *Returning Home Program*.

Intermediate-term Objectives

- Evaluate the impact of caregiver initiatives on the consumers and community.

2) Managing Chronic Illness

As seniors age, it becomes more likely that they will experience health related problems and suffer from one or more chronic conditions. In the past, the elderly most commonly faced acute and infectious illnesses. Today, due to a greater focus on healthy lifestyles and preventative care, the elderly are more likely to be managing one or more chronic conditions.

Among Medicare beneficiaries, 62% of those age 65 -74, 76% of those age 75-84, and 82% of those age 85 or above suffer simultaneously from two or more chronic illnesses. The ability of seniors to manage chronic conditions is impacted by their mobility, financial resources, social support systems, and other factors. There is much that can be done to manage chronic conditions. This plan will focus on two conditions prevalent in our community: high blood pressure and depression. These particular illnesses were chosen after examining prevalent health conditions, reviewing existing services that address those conditions, and identifying the remaining areas of highest need.

There is a need to educate the community and professionals about the risks, symptoms, diagnosis and treatment of hypertension/high blood pressure and of depression.

Physicians who work in partnership with their patients by providing them with education regarding the symptoms, warning signs, and treatment of chronic diseases can positively influence the ability of seniors to manage their conditions.

Studies indicate that 25% to 33% of persons with other chronic health conditions--such as cardiovascular disease, diabetes and arthritis--show signs of depression. Depression, although often ignored, is a serious illness that is associated with functional decline. Evidence shows that screening improves the accurate identification and treatment of depressed patients in primary care settings and decreases clinical morbidity.

Goals

A) Improved high blood pressure management and reduced incidence of stroke among seniors.

Objectives

Short-term Objectives

- Use education and screening to help seniors and their caregivers understand and manage high blood pressure.
- Support Quality Initiative on blood pressure screenings and counseling to be conducted in selected primary care sites that have a high percentage of senior patients.
- Screen community seniors for hypertension and promote the utilization of home monitoring systems or recurring community-based screenings.
- Enhance community capacity to support self-management of hypertension.
- Offer opportunities for consumer education on stroke prevention, including a teaching day.

B) Reduced incidence of untreated depression among older adults in Broome County.

Short-term Objectives

- Use education and screening to help seniors and their caregivers understand and manage depression.
- Help seniors recognize depression and support them in the management of this chronic condition and thus impact the management of other health conditions and life circumstances.
- Develop peer-to- peer support.

3) Staying Socially Connected

A body of research has verified that retaining social connections is beneficial to the physical and mental well being of the elderly and helps them to remain independent.

Social connections have a positive impact a senior's ability to cope with the changes that are an inevitable part of aging. Conversely, a lack of social support is correlated with an increased risk of physical illness, depression and substance abuse. Older women are at the greatest risk from the impact of isolation.

While seniors and service providers agree that isolation is an important issue in Broome County, there is a lack of local data that clearly identifies the extent of social isolation in the community. To address the needs of seniors at risk for social isolation, it is imperative that specific at-risk populations and neighborhoods be identified.

Service providers need to identify current strategies that are successful in keeping seniors connected. In addition, it is imperative that service providers assure that their services are compatible with the on-going involvement of friends and neighbors in the provision of low-cost and no-cost services to socially isolated seniors. A wide array of community organizations can help keep seniors connected while giving them a chance to help others.

To address social isolation in Broome County will require strategies that will:

- 1) demonstrate the impact of social isolation on the ability to remain independent;
- 2) convince seniors to invest in the development of social supports;
- 3) ensure that community backing is in place to help seniors develop and maintain social supports.

Goals

A) Broome County's older adults will make choices that help them stay connected to services and to social supports thereby reducing isolation, depression and decline, and promoting social and physical wellness and well-being.

B) Seniors have activities available to them that are stimulating, interesting and appeal to a diverse range of interests.

Objectives

Short-term objectives

- Educate seniors on the importance of remaining socially connected.
- Promote an awareness of the social supports available to seniors.
- Offer enhanced support to seniors experiencing social transitions.
- Support agencies in their efforts to plan for, and expand their capacity to offer, coordinated social supports for seniors with social needs.

Short-term objectives

- Create meaningful and interesting volunteer opportunities.
- Compile best practice information from programs that are physically and intellectually stimulating for seniors.

Intermediate-term objectives

- Conduct a time and talent survey of local seniors to learn what they may be interested in providing the community.

4) Understanding and Accessing Services

There is a wealth of information on services available to seniors. The challenge is getting the information to the seniors at the time they need it, and in a way that makes it comprehensible and helpful. Access to information helps seniors make well-informed decisions and lets them remain independent. Seniors, especially when faced with a life-changing event, need information that is targeted to their needs. It is important that their learning styles and education levels are taken into account; the information must also be provided at a time and place that is appropriate for the senior.

Broome County has a central access point, the Senior Resource Line, for general information about all senior services. The community has also developed a new on-line Elder Services Guide, a searchable database with information on all services that seniors might need. These core access points to senior services need to be promoted to all seniors and their caregivers.

Goals

A) The community is aware of the services available in the long term care system.

Objectives

Short-term Objectives

- Coordinate a communications campaign that promotes awareness of Aging Futures Partnership activities and implementation efforts.
- Coordinate Partnership members in the development of the weekly *Senior Connections* television feature.
- Coordinate awareness campaigns.
- Coordinate phone banks to promote the *Elder Services Guide* and stroke prevention.
- Create 2 half-hour documentaries featuring information on caregiving and social connections.
- Coordinate print media to complement Aging Futures Partnership activity.
- Establish an Aging Futures Partnership web page.

Intermediate-term Outcomes

- Evaluate overall impact of media campaign.

B) Information is consistent and directs the consumer and caregiver to the most appropriate care that meets their needs.

Short-term Objectives

- Implement a long term care education program that features consumer and professional education, and consumer advocacy.

- Pilot a case assistance program to assist vulnerable seniors in following through on their care plans.

5) Home Repair and Modification

Seniors have clearly indicated that they wish to remain in their own homes. But homes often need modifications to make them safe and suitable for long term care recipients. Normal home repair and maintenance work is also essential for seniors wishing to remain at home. Much of the housing stock in Broome County is old, so repairs are frequently needed. Energy conservation and safety concerns are also an issue in many older houses.

In 2002, more than 12% of Broome County respondents interviewed by Mathematica Policy Research, Inc. stated that their current residence would need significant repairs, modifications or changes to improve their ability to remain in their home over the next five years. Modifications to current homes can increase the amount of time a person is able to live independently.

Seniors may find that arranging and paying for home repair and modification is difficult. They may be unaware of simple modifications that would be helpful; they may not know how to arrange to have the work done; and they may be concerned about their ability to pay for the work.

Goals	Objectives
<p>A) Seniors understand the need to make home repairs and modifications so that they may retain their independence.</p>	<p>Short-term Objectives</p> <ul style="list-style-type: none"> • Provide seniors with education and literature on home modification and on the positive impact of modifications. • Provide seniors with information on how to perform minor repairs themselves or how to hire others to do the work. • Provide seniors with information on the connection between keeping their homes in a livable condition and maintaining their health, safety and independence. <p>Long-term Objectives</p> <ul style="list-style-type: none"> • Construct an exhibit that displays safe bathrooms, kitchens and lighting at the annual Broome County Home Show. • Assess the feasibility of modifying a house to be elder friendly as a demonstration product for local seniors. (Modifications will demonstrate the best possible methods by which older homes can be made safer and accommodate aging homeowners.)

B) A system is in place for assessing energy and safety issues in homes occupied by seniors in Broome County.

Intermediate-term Objectives

- Develop a “road show” that displays the benefits of modifying a home to be elder friendly.
- Support volunteer-based groups who would conduct a home inspection process that addresses home energy and safety issues.

C) Seniors know who to contact for repairs and modifications, know generally how much the work should cost, and how to supervise the work.

Short-term Objectives

- Provide seniors with education and literature on how to hire a reliable, affordable, and competent contractor.
- Educate seniors on the need to, and how to, check a contractor’s references.
- Provide education to seniors on how to secure repairs with the income and resources that they have available.

Intermediate Objectives

- Pilot a small initiative to support seniors in negotiating with a contractor.
- Educate seniors on the benefits and consequences of filing a homeowner’s insurance claim to pay for repairs.

D) A forum is provided where the various home repair and modification stakeholders can meet to discuss ways to assist seniors.

Intermediate-term Objectives

- Form a task force to explore funding and collaborative opportunities to address community home repair and modification needs.
- Support collaborations between contractors, outside agencies, media and volunteers in the rehabilitation of older homes.

E) Home repair service staff, information and referral personnel, case managers and case assistant staff know how to educate and inform seniors on the issues of home repair and modification.

Intermediate-term Objectives

- Service providers learn techniques for motivating and educating seniors to make changes in the home that will allow them to continue living there.
- Host speakers from other communities that have had a positive impact on their home repair and modification needs to educate our community on the steps it can take.

6) Finding Affordable and Appropriate Housing

The availability of appropriate housing options significantly influences a senior's ability to remain independent. Seventy-seven percent (77%) of Broome County's seniors are homeowners. In 2002, nearly 80% of Broome County respondents interviewed by Mathematica Policy Research, Inc. indicated that remaining in their own home was "most important" or "very important" to them. Most seniors assumed it would be possible to remain in their own homes. If it becomes necessary for a senior to move into alternative housing, it is imperative that housing accommodates the senior's needs and preferences.

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. Housing education should address a variety of issues, including social issues such as the "interdependence" of family and friends.

As the community looks to fulfill the varied and complex housing needs of the elderly, it is necessary to consider not only rates of disability and projected need at each level of care, but also the ability of the senior to pay for housing. Planning for housing needs must address affordability, adequacy and appropriateness. The needs of seniors with low to moderate income must be considered.

Goals	Objectives
A) Information about planning for housing needs is accessible to seniors.	Short-term Objectives <ul style="list-style-type: none">• Feature information about planning for housing needs at events that attract seniors.• Publicize the senior housing options available in each region of the county.
B) Components of the senior housing application process are centralized.	Short-term Objectives <ul style="list-style-type: none">• Explore developing and implementing a single application process for senior housing and secure an agreement between facility owners/managers to participate in the plan. Long-term Objectives <ul style="list-style-type: none">• Explore the feasibility of maintaining a central waiting list for senior housing.

7) Legal and Financial Planning

Legal and financial planning are both complex issues and it is best that they are addressed early. Doctors, Medicaid staff, agencies, family members, churches, friends and

neighbors, and service clubs need to work together to provide reliable information and to motivate adults to take action. Personal and financial planning can help seniors to effectively use their resources to meet their long term care needs. Supports are in place to assist seniors and their caregivers in planning; however, more efforts are needed. While completing a health care proxy and living will can help ensure an individual remains in control of medical decision-making, the vast majority of adults do not take this action.

Seniors face unique barriers when making legal and financial plans. Many seniors are not aware of services available to assist with this planning. It is important to seek out unbiased information.

Adult children are more apt to be involved in health care planning issues than they are financial planning. Within some groups, there is still a cultural bias against joint spousal control of finances.

Goals

A) Seniors are aware of the services available to assist them with legal and financial planning.

B) Older adults and their family members plan for their future legal and financial needs.

Objectives

Short-term Objectives

- Promote the message that the Office for Aging Senior Resource Line is the first place to call for information.

Long-term Objectives

- Offer low-cost education programs in Broome County communities that promote pre-need planning, record retention, health care proxies, and advance directives.

Intermediate-term Objectives

- Make available videotaped testimonials of consumers who articulate the positive effects of their decisions in health care and legal planning to help convince seniors to plan for the future.
- Engage adults of all ages in legal and financial planning.
- Involve spouses in legal and financial planning.

8) Maintaining Health and Wellness

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

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 as seniors strive to remain healthy. A variety of factors can influence the health of a senior. Poor weather conditions can limit senior participation in community activities, as can limited financial resources. It is also assumed that, as seniors age, isolation can become more common. Wellness can be inhibited when a senior has declining mobility or is impaired by other health conditions. However, it is important to recognize that experiencing an illness can serve to 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.

The community can assist the elderly in staying well by doing simple things that enhance quality of life. Elder service agencies in Broome County promote an awareness of social resources among older adults, but it is critical to maintain outreach efforts and begin reaching the more isolated seniors. Seniors and the community at large need to work together to ensure that each senior has a support system in place.

Goals

A) Seniors have access to the resources, activities and materials that they need to maintain a healthy lifestyle.

B) Community wellness options allow seniors to take a comprehensive approach to wellness.

Objectives

Short-term Objectives

- Promote an awareness of the wellness options that are available in the community.
- Ensure that seniors have access to reading materials, educational opportunities, exercise options, and social opportunities that support wellness.

Intermediate-term Objectives

- Identify the wellness activities that seniors need and want.

Long-term Objectives

- Encourage community organizations to consider the physical, emotional, social, intellectual, and spiritual wellness needs of seniors when designing activities.

C) Organizations concerned with senior wellness will coordinate the development of wellness options for older adults in Broome County.

Short-term Objectives

- Support the communication of key community wellness issues.
- Identify community teams to work on the issues and to maintain community focus and interest in wellness.

Intermediate-term Objectives

- Encourage seniors to make small changes and to keep building on small successes in moving toward healthy life styles.

Long-term Objectives

- Evaluate the efforts of community groups and organizations to build linkages with research institutions.
- Engage the participation of creative problem solvers and community leaders in developing wellness initiatives.
- Obtain the financial resources needed to fund programs.

9) Mental Health

The elderly face unique challenges in regard to maintaining good mental health. Health problems, family changes and isolation leave seniors more vulnerable to depression. Special attention needs to be paid to the stigma attached to mental health issues as this population may be reluctant to get help. Service providers, agencies, consumers, and the general public can all benefit from additional training and education on recognizing signs and symptoms of depression and other mental illnesses as well as on the importance of keeping the elderly engaged in meaningful community activities.

According to the National Academy on an Aging Society, 25% –33% of persons with other chronic conditions such as cardiovascular disease, diabetes and arthritis are considered depressed. Depression is a serious problem associated with functional decline among frail elders. The U. S. Preventive Services Task Force recommends screening adults for depression in clinical practices that have systems in place to assure accurate diagnosis, effective treatment and follow-up. The Task Force has evidence that screening improves the accurate identification of depressed patients in primary care settings and that treatment of depressed adults identified in primary care settings decreases clinical morbidity.

Goals

A) The community is educated on the mental health issues faced by older adults with a focus on depression and its prevalence in the elderly population.

B) Seniors have access to affordable and accessible case management services to assist them with their mental health.

C) Medical and mental health providers engage in inter-professional collaboration and coordination to implement a data collection system to provide information on the mental health issues faced by older adults in Broome County.

Objectives

Short-term Objectives

- Develop a series of mental health education material that promotes an understanding of the mental health issues faced by seniors; and identifies the resources available to assist seniors with their mental health needs.
- Advocate for programs that offer seniors social contact and social support.

Intermediate-term Objectives

- Develop a community outreach plan for seniors that incorporates media, face-to-face education, and the Internet to promote understanding of senior mental health issues.
- Assist seniors in recognizing depression and support seniors in management of this chronic condition, thereby impacting numerous health conditions and the senior's ability to manage life circumstances.

Intermediate-term Objective

- Explore whether a care management or a case management model is the most effective model for addressing senior mental health needs.
- Implement best practice models based on our community's needs.

Long-term Objectives

- Form partnerships between medical and mental health providers.
- Explore means to develop communication ties between mental health and medical providers.

- Develop a list of data elements agreed upon by providers, human services agencies and consumers to be collected in regard to senior mental health issues.
- Pilot computerized data collection procedure to test the agreed upon data elements.
- Develop a system where data is shared across provider networks.

D) The mental health system’s response to seniors is improved.

Intermediate-term Objectives

- Write successful funding proposals for mental health initiatives.
- Conduct a community mental health needs assessment.
- Document successful program activities that result in political and policy changes.

10) Transportation

Remaining mobile is an important component of retaining the maximum level of independence. Transportation options support seniors in getting to medical appointments, accomplishing daily tasks such as shopping, socializing and retaining their independence. Most seniors rely on private vehicles for their transportation. In Broome County, 18.7% of the age 65+ households, or 3,967 households, do not have a vehicle available. As seniors experience physical or cognitive changes, their driving skills may deteriorate. Driving cessation typically climbs in the 70+ population and peaks at age 85. Men are expected to live six years past the point where they stop driving and women an average of 10 years. Providing transportation can be stressful and burdensome for caregivers who often assume this role.

As the senior population grows, and more seniors choose not to drive, we will need more transportation capacity. Seniors are interested in additional on-demand transportation. Coordination between the various service providers also supports an efficient community-based system.

Consumer involvement is vital to the transportation planning process. Community education efforts on transportation options are an on-going need.

Goals

A) Transportation planning initiatives incorporate the needs and preferences of Broome County seniors.

Objectives

Intermediate-term Objectives

- Offer consumers of transportation services a means to participate in the planning process so that they can offer their perspective on transportation needs.

- Integrate the consumer perspective into transportation planning.

B) Seniors know what transportation services are available and understand how to access transportation services.

Short-term Objectives

- Support public education efforts about available transportation services and how to access transportation services.

C) The need for additional capacity is defined and plans to implement changes are completed.

Intermediate-term Objectives

- Assess the feasibility of seniors supporting a private senior transportation company to facilitate additional transportation capacity.

D) An efficient community-based transportation system with improved coordination between the various service providers is in place.

Intermediate-term Objectives

- Hold quarterly meetings to provide an exchange between public/private providers of transportation services. Key players meet together to assess need, capacity and new opportunities.

A Note to the Reader on Implementing Strategies

The goals and objectives that have been included in this plan to address the critical issues facing seniors and caregivers have been identified through an inclusive community planning process. For the majority of these goals and objectives, no organization or individual has taken responsibility for implementing activities to realize the strategies. Members of the Aging Futures Partnership are encouraged to take action to fulfill the objectives and reach the goals that have been identified through the community planning process. The Partnership envisions that for each objective an organization, partnership or entire system will step forward to implement the strategies that will allow the community to achieve the objective. Opportunities to act will arise and organizations will decide that they are suited to realizing a specific objective.

It is the vision of the Aging Futures Partnership that the Partnership will serve as a forum where individuals and agencies can come together to discuss how best to address the strategies. In addition, this plan should be viewed as a living document that will evolve with the needs of our seniors. As new challenges arise, the Partnership will develop the strategies for addressing those challenges. It is through harnessing the power of our collaboration that an integrated system of care will be achieved in Broome County.

Next Steps

Resources

The Aging Futures Partnership is committed to obtaining the resources necessary to implement the strategies outlined in this plan. The Partnership's role in acquiring resources will be either to:

- Serve as an umbrella organization to support a member agency that applies for a grant to fund activities relevant to the plan;
- Supply data and other resources to support member organizations in their pursuit of funding to assist older adults.

In September of 2003, two significant grants were awarded to partner agencies for activities that will contribute to systemic change in Broome County.

The New York State Department of Health, with funds provided by the Centers for Medicare and Medicaid, awarded a *Real Choices for Systems Change Grant for Community Living* to the Broome County CASA. Grantees were chosen based upon their proposals to make enduring changes in the long term care systems. The purpose of this funding is to provide consumers and caregivers with:

- Comprehensive and unbiased information on all available long term care services and programs;
- Assistance in obtaining needed services; and
- Advocacy services when service needs are not being appropriately met.

Broome County CASA served as the lead agency in successfully applying for the Real Choices grant. Working in partnership with Action for Older Persons, Inc. (AOP) and the Office for Aging, CASA will develop and implement a multi-dimensional long term care education and assistance program that features four primary programmatic areas: consumer education, professional education, consumer advocacy, and case assistance.

The Community Foundation for South Central New York, in partnership with the Stewart W. and Willma C. Hoyt Foundation, awarded Action for Older Persons, Inc. a grant to address a critical need that AOP identified in the community. AOP applied as the lead agency on behalf of the Aging Futures Partnership for a Multi Media Public Awareness Campaign for Broome County's Older Adults and Their Caregivers. The monies from this grant will be used to increase the awareness of the aging services offered within Broome County.

The media campaign will include commercials to promote the *Elders Services Guide*, telephone phone banks, four thirty-minute community issue panels, 52 weekly senior connections features on WBNG news, and commercials on staying connected. Both

WBNG and Time-Warner Cable contributed significant in-kind matching resources to this project.

Also in September of 2002, the Aging Futures Partnership submitted a proposal to The Robert Wood Johnson Foundation Community Partnerships for Older Adults Implementation Grant. This application proposed activities to address the top three critical issues identified by seniors and caregivers in the spring of 2003 as well as components of a media campaign to increase awareness and understanding.

Critical Thinking and Strategies

An underlying purpose of the Aging Futures Partnership is to harness the collaborative power of the aging services community to accomplish tasks that will integrate the long term care system and allow seniors to remain as independent as they desire.

It has been through the participation of individual consumers, members, and organizations that goals and objectives have been identified for improving the long term care system in our community. The planning process has served as a catalyst through which real actions can now be taken on behalf of Broome County seniors.

Situation Analysis

As the Aging Futures Partnership evolves, it faces a number of internal and external challenges. These challenges can be met by building on the Partnership's strengths, taking advantage of external opportunities and looking to areas of potential Partnership growth. Each of these factors is discussed in brief below.

- **Internal Challenges** – The Partnership must overcome a number of internal challenges if it is to ensure that the community long term care system is responsive to the needs of our seniors. Among these challenges are overcoming the problems of limited resources, issues of territoriality, and the difficulties in linking the acute care and long term care systems. The Partnership has the opportunity to be the primary voice for change by acknowledging that resource constraints can be better addressed through collaboration and pooling of resources.

The Partnership also recognizes the challenges inherent in the competitive health care marketplace. Overcoming this challenge to work towards mutually agreed upon outcomes will mean building on prior successful collaborations by competing organizations.

- **Partnership Strengths** – The Aging Futures Partnership has a number of strengths and successes to build upon. The first of these strengths is the talent, experience and knowledge of its members. The Partnership benefits from a diverse membership that is committed to a set of common goals. As a body, we

have harnessed the power of this diversity and provided members with opportunities to work toward common goals. Doing so has led to the successes that we have had this far and the accomplishments that will be achieved in the future.

A second strength is the willingness of the individual partners to work together. This cannot be understated, as it is the foundation of all that is done in the Partnership's name for Broome County seniors and caregivers. It is this willingness that will allow this strategic plan to be implemented.

- **External Challenges** – As a Partnership, there are a number of external challenges to overcome to achieve our vision.

One challenge is securing the resources necessary for agencies to achieve change and create new service components. We are facing a fiscal environment where there is more competition for fewer dollars. Many funders are requiring that their grantees partner with other organizations to address community needs. The Aging Futures Partnership umbrella provides individual agencies with the means to meet and foster collaborative requirements.

A second challenge relates to affecting systems change. In its effort to integrate the long term care delivery system the Partnership must struggle against reimbursement systems that reward fragmentation. Overcoming this challenge is dependent on the achievement of policy change at the state and national level. The Partnership provides an enhanced voice based on program successes with which to offer suggestions for policy change.

- **External Opportunities** – The Aging Futures Partnership is well positioned to take advantage of opportunities that are presenting themselves for realizing systems change. The first of these is a growing recognition in society of the need to prepare for the coming age wave. This recognition is leading public policy makers to consider reforms that will lead to systems change and integration. Here in New York, for example, the Governor's office has directed every New York State agency to examine how the age wave will affect its service delivery in the year 2015. Restructuring our Partnership and implementing a committee structure has positioned the Aging Futures Partnership to take advantage of opportunities emerging from policy changes, as well as to influence the direction of public policies.

A second opportunity exists in the emerging trend of funders to support efforts undertaken through collaboration. The Aging Futures Partnership is a longstanding alliance with the ability to envision and accomplish innovative objectives. Also, the Partnership has an impressive history of collaborative accomplishments to demonstrate its ability to meet funder goals. As more grants become available to fund activities that will integrate the various components of the community long term care system, the Partnership stands ready to take advantage of them.

- **Partnership Areas for Growth** – As the Partnership moves toward realizing its goals there is room for achieving greater linkages with private businesses. The power of such partnerships can already be seen in the activities taking place to implement the communications plan. In the future, the inclusion of business has the potential to provide the partnership with expertise in areas such as marketing and market analysis. The inclusion of private business will potentially expand the resources available to the partnership either through in-kind or direct financial resources. By involving private business the partnership may potentially affect the way that small business and companies deliver their services so that they are more senior friendly.

As the Partnership moves forward it will address barriers arising from both internal and external challenges. By harnessing the energy and talents of its individual members, the Partnership anticipates that it will continue the momentum that has enabled us to work together in addressing senior issues.

Partnership Management

Assumptions, Outcomes and Guiding Principles

The Aging Futures Partnership is dedicated to enhancing the quality of life for all people over the age of 60 in Broome County through community based planning. A set of assumptions forms the basis of Partnership activities.

Assumptions

- Older adults wish to retain their independence for as long as possible.
- The participation of older adults in the planning process is essential for designing an effective and responsive long term care system.
- Seniors and caregivers need understandable information on long term care and support.
- Seniors and caregivers need support through periods of transition in an elder's care.
- Caregivers of vulnerable seniors want services that support them in their caregiving role.
- Older adults and their caregivers want a comprehensive array of services to choose from to meet their long term care needs.
- Services should be understandable, responsive, reliable and accessible.

- Collaboration between service providers is desirable.
- The Partnership is a resource that supplies members with timely and accurate data that supports decision-making and funding proposals.

In its planning efforts, the Partnership strives to produce outcomes that achieve the benefits of these assumptions.

Intended Outcomes

- Connected, independent and well seniors
- Empowered caregivers
- A long term care system that demonstrates responsiveness to community needs

Based upon these assumptions and the intended outcomes of planning efforts, members of the Partnership have agreed to the following Guiding Principles.

Guiding Principles

Involvement

- The opinions, desires and participation of older adults and their caregivers will be central to our planning process.
- The Partnership will engage consumers as well as leaders in business, government, and health and human services in the process of community planning.
- Mutually beneficial outcomes are the basis for our work. The Partnership structure is intended to have members share in the work and share in the success of our efforts.

Process

- We will engage in discussion and planning to foster a common understanding of issues.
- The work of the Partnership is intended to stimulate action and promote systems change that impacts the lives of individuals, enhances our community and the long term care system at large. Partnership activities will be built on evidence-based best practices, innovation and a commitment to ongoing evaluation.
- The Partnership will demonstrate leadership and offer a community voice on senior services planning and issues that impact seniors.

- Members of the Partnership will be encouraged to assume leadership roles in the community at large and within the partnership. New leadership will emerge and this is valued in the long-term interest of the partnership.
- The Partnership will build on a history of demonstrated teamwork. Decision making processes will be clear to all participants and evaluated over time.
- The Partnership will pursue and allocate resources based on consumer needs. The Partnership will actively support members in pursuit of resource development efforts. When appropriate, resource sharing will be suggested.

It is envisioned that these Guiding Principles will serve as a set of standards when implementing the strategies outlined in this document.

Committees

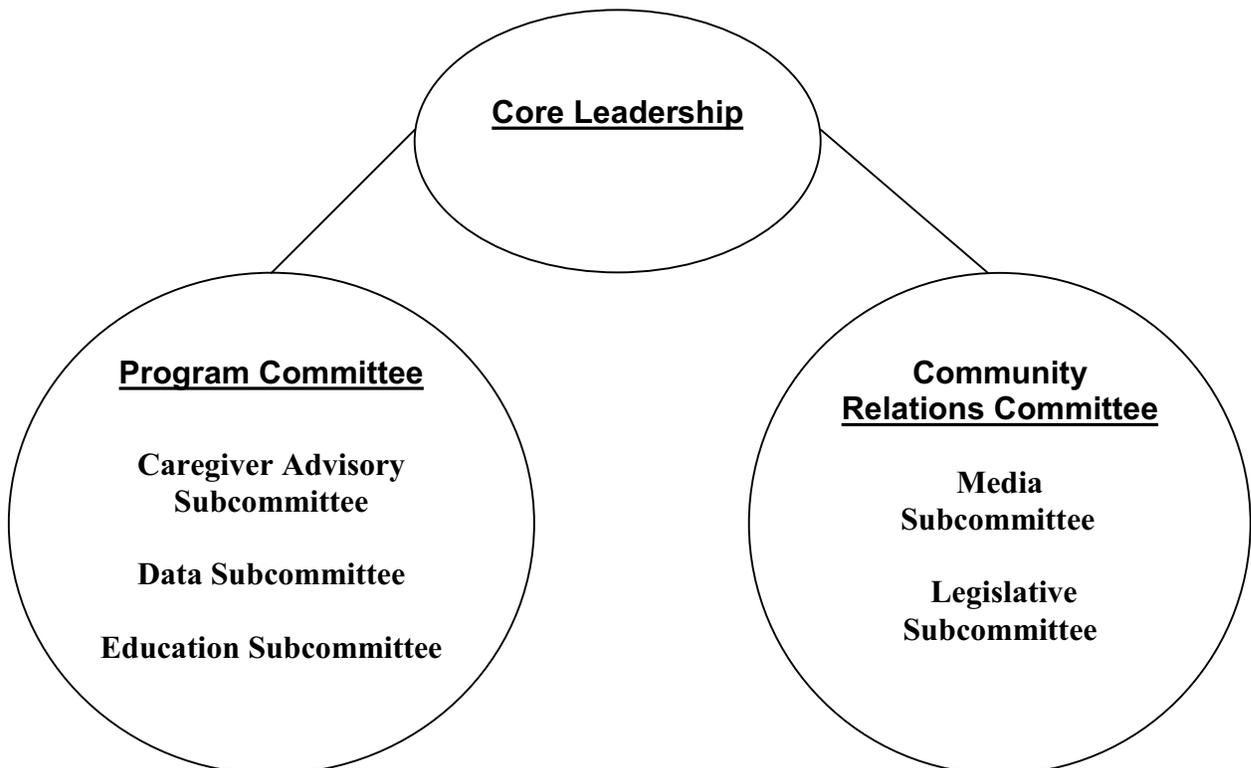
The Aging Futures Partnership has come to rely on a committee structure to accomplish its tasks. During the planning process, in which this plan was developed, the standing committees included the Data, Community Resource Inventory, Diversity Advisory, and Core Leadership committees.

The next stage in the evolution of the Partnership is to strengthen the collaboration so that it will provide leadership in shaping the community's long term care system. To achieve this purpose, the Partnership has developed a committee structure. The committee structure will allow members to follow their interests and strengths.

Listed in Figure 1 are the committees that will comprise the Partnership and support its efforts to ensure the community has systems and supports that promote well being, maximize independence, and minimize functional decline and its effects in the vulnerable elderly population.

Community Partners

**Consumers, Government, Education, Service Providers, Health Care,
Business, Caregivers, Advocates,
Faith-Based Communities**



Goal of Committee Structure: Develop and strengthen the Aging Futures Partnership to maintain leadership in planning for the long term care system in Broome County.

1. Core Committee

Goals

Provide oversight of Partnership activities including the implementation of the Community Partnership for Older Adults' activities.

Objectives

- Develop resources for the Partnership.
- Monitor the financial status of Partnership contracts and grants.
- Make recommendations to the full Partnership on procedures and policies related to financial and operational decisions.
- Provide guidance and oversight of Partnership grant activities.

2. Community Relations Committee

Goals

Develop an internal and external communications plan.

Objectives

- Establish benchmark communication goals for the Partnership.
- Specify regular communication activities.
- Propose evaluation methods for communication efforts.
- Present and recommend updated versions of the communication plan to the full partnership on an annual basis.

A. Media Subcommittee

Goals

1) Create a greater awareness in the community of the implications of an aging society and the needs of older adults.

2) Educate older adults and caregivers so that they become more knowledgeable consumers of long term care services.

Objectives

- Coordinate print and electronic media activities to highlight the needs of older adults and caregivers and the services available to meet those needs.
- Publicize Partnership initiatives and activities so that the community is aware of the efforts and accomplishments of this collaborative effort.
- Highlight the activities and successes of individual partners in addressing the long term care needs of older adults.

B. Legislative Subcommittee

Goals

- 1) Track and advocate for public policies that will strengthen the long term and supportive services long term care system.
- 2) Improve the ability of older adults and caregivers to access the long term care system.

Objectives

- Track public policy initiatives that affect the long term care and supportive services system.
- Educate public officials on the long term care system and on policies that would benefit vulnerable older adults and caregivers.
- Inform the Partnership on legislative initiatives that would affect the long term care and supportive services system and coordinate any advocacy activities concerning those initiatives.

3. Program Committee

Goals

Support and evaluate Aging Futures programming and recommend future program direction.

Objectives

- Support projects and services developed by the Partnership.
- Support the projects and services developed by Partnership members.

A. Caregiver Advisory Subcommittee

Goals

Offer consumers and other stakeholders the opportunity to support development of several community-based initiatives including the *Real Choices* grant and the *Returning Home Program*.

Objectives

- Assess strategies for integration of services and systems change.
- Make recommendations on strategies to support informal caregivers.

B. Education Subcommittee

Goals

The goal of the Education Committee is to support on-going professional and community education.

Objectives

- Offer in-service and training opportunities.
- Present data and issues impacting seniors annually to the full Partnership.
- Make data and information available to interested members.
- Provide education to the community at large.

C. Data Subcommittee

Goals

Support the efforts of the Partnership by organizing and supplying existing data and develop systems to address future data collection needs.

Objectives

- Supply data for funding proposals written by the Partnership or its members.
- Supply data for feasibility studies and needs analyses.
- Integrate newly available data with existing information and make available to the Partnership.
- Develop indicators of community well being of the elder population.

Partnership History

In 1989, a consortium of agencies and individuals came together and formed Broome County Aging Futures Partnership. The task of this group has been to provide an ongoing assessment of geriatric service needs and the subsequent identification of gaps in long term care and supportive services. Members of the Aging Futures Partnership include representatives from government, hospitals, home health care agencies, mental health providers, nursing homes, educational institutions, consumer advocacy groups, politicians, social service agencies, and others.

During 1993, the Partnership coordinated the first Aging Futures project, a telephone survey of 1,420 seniors residing throughout Broome County. This survey served as a catalyst for community action. The findings of this survey were used to determine and address areas of need as well as to obtain funding for developing service options to meet those needs.

As a result of the Aging Futures effort, specific improvements in Broome County's long term care and supportive services delivery systems were accomplished. These include:

- Expanding health and transportation services in rural Broome County through a program joining resources of the Rural Health Network, the Broome County Office for Aging, and the United Way of Broome County, Inc.
- The Broome County Council of Churches' Neighborhood Interfaith Volunteer Caregiver Program expanded their volunteer shopping, housekeeping, transportation, and friendly visitor programs to rural regions.
- The local chapter of the Alzheimer's Association developed a caregiver respite program.
- The First Ward Action Council created and began operating a home repair program for older adults with low and moderate incomes.
- Broome County Office for Aging and the Retired and Senior Volunteer Program partnered on a wide range of wellness and prevention programs focusing on those chronic health conditions most prevalent in Broome County's senior population (i.e., arthritis, diabetes, heart disease).
- The Broome County Office for Aging constructed senior centers in two rural areas of the county to improve service delivery to underserved populations.

As a result of these accomplishments, in 2002 the Aging Futures Partnership received a Robert Wood Johnson Foundation grant under the Community Partnerships for Older Adults initiative. This grant provided funds to engage in planning efforts designed to strengthen and sustain the comprehensive long-term care and supportive services system

in order to meet the growing needs of vulnerable older adults. This initiative specifically targeted improvements in long term care that are more responsive to the needs of consumers and that provide those consumers with a broader range of options and a greater degree of choice.

To improve the long term care system and make it more responsive to the needs of consumers, the Partnership coordinated an 18 month planning effort, using a variety of methods, that focused on consumer input. This research gave the partnership the information it needed to develop strategies to address needs of functionally limited elders and their caregivers.

The Aging Futures Partnership has successfully developed relationships that have built upon mutual respect and understanding about each member's priorities, methods, and constraints thus contributing to the planning effort's success. In 2003, the Partnership consisted of 55 members representing a distinctive collaboration of consumers, and public, private, and educational organizations in Broome County. Members recognize that sharing information, data and collaboration is in their best interest. The Partnership believes that decisions should be driven by consumer-identified needs.

The Partnership's long-range plan is to continuously move to higher levels of collaboration. Integration of strategies for financial and organizational sustainability is expected as the Partnership evolves to the point where members are willing to assume the risk of pooling and jointly securing resources and sharing the results and rewards. It is anticipated that the initiatives will foster systemic change, influencing local agencies to better meet the needs of our older adults.

Aging Futures Partnership Members

Agencies:

Action for Older Persons, Inc.
Alzheimer's Association
American Cancer Society
Association for Vision Rehabilitation
and Employment
Binghamton University Geography
Department
Binghamton University Public
Administration Department
Binghamton University Social Work
Department
Broome County CASA
Broome County Council of Churches
Broome County Health Department
Broome County Nursing Home
Administrators
Broome County Office for Aging
Broome County Planning Department
Broome County Social Services
First Ward Action Council
Home Health Care Coalition
Jewish Family Services
Lourdes at Home
Lourdes Hospital
Mental Health Association
Metro Interfaith Housing
Refugee Assistance Program
Retired Senior and Volunteer Program
SEPP Group, Senior Housing
The Family & Children's Society
Twin Tier Home Health
United Health Services, Center for
Senior Health
United Health Services, Decision
Support and Marketing

United Health Services, Upstate Medical
University
United Way of Broome
Wellsprings Consulting
YWCA

Consumer Advocates:

Cindy Bowen
Elizabeth Cohen
Joan Eisch
Ruth Ferrari
Gail Goldberg
Donald Jones
Joan Mitchell
Mary Normile
Jeanne Randall
Gail Reeder
Richard Rogers
Suzanne Sullivan