Community Planning for Aging Well: An Overview

AGING WELL IN COMMUNITIES: A TOOLKIT FOR PLANNING, ENGAGEMENT & ACTION

This section of the Aging Well Toolkit introduces the community planning process, offers strategies for engaging boomers, and explains how best to position your overall aging well planning effort for success.

RESIDENT SURVEYS | PUBLIC FORUMS | FOCUS GROUPS

A Center of the Public Health Institute

POSITIONING FOR SUCCESS

- Start planning now to position your community for the changes that are inevitably coming.
- Share the planning process and the responsibility for solutions with key community leaders, organizations, and local government departments.
- Position local government as the convener and facilitator of the process, and a community partner in identifying and implementing solutions.
- Build on your community's existing assets and strengths.
- Form and support an inclusive planning committee to guide your aging well planning process.
- Develop strategies and use new terminology to attract boomers and overcome their avoidance and denial of aging issues.
- Design culturally competent outreach strategies and participatory structures that engage all community groups.
- Communicate results and action plans to all key community agencies and institutions.
- Build and maintain momentum with immediate actions and short-, mid- and long-term goals and action steps.
- Incorporate the perspective that this is a long-term effort to create a community that facilitates and supports health across the lifespan.

Through its work with communities around California, the Center for Civic Partnerships has identified two critical success factors for local governments embarking on aging well planning efforts:

- Planning for aging well requires commitment and participation from all affected sectors in the community, not just local government. It cannot be an isolated activity.
- Communities should get started sooner rather than later. They should be proactive rather than reactive. In the long run, good planning will save your community time, money, and resources.

Gathering information from diverse stakeholders is an important part of any aging well planning process. Aging Well in Communities: A Toolkit for Planning, Engagement & Action presents guides to three key activities:

- Conducting Aging Well Resident Surveys
- Conducting Aging Well Public Forums
- Conducting Aging Well Focus Groups

Each guide contains specific instructions, examples, checklists, and resources. While each activity is unique, they are built from a common foundation that includes:

- Understanding how planning for aging well in the community is different from other planning efforts
- Deciding what role local government should play
- Forming a broad-based, representative planning committee
- Choosing language that will attract boomers and engage them in your effort
- Developing cultural competence
- Gathering data from your community
- Reporting and using your results

This section of the toolkit discusses each of these foundational elements in detail.

Understanding How Planning for Aging Well Is Different

In many ways, planning for the increasing older adult population is similar to any other planning process. Yet it also presents unique challenges that must be addressed for the planning effort to succeed.

Marketing and communications can make or break your planning effort. Most boomers avoid talking about or even thinking about a future that may involve a loss of youthfulness, ability, or independence. Moreover, many boomers are busy caring for aging parents, pursuing major career accomplishments, meeting the demands of teenagers and younger children at home, dealing with unexpected changes in retirement savings and plans, or adjusting to new realities in the housing market. To draw boomers into your planning process, it's essential to use language that appeals to boomers without stigmatizing them (see "Choosing the Right Language" below). Packaging the overall planning process, as well as specific events, to appeal to boomers' idealism and desire to make a difference may help overcome their inherent resistance to the topic and the realities of limited time and competing interests. A one-size-fits-all marketing and communications strategy may not be effective. Boomers are diverse in interests, experience, and age, which means you may need to develop tailored strategies to reach different audiences.

Local governments may need to move beyond traditional models. Local governments already provide many programs and services targeted to older residents. Yet boomers who have reached or are approaching the traditional retirement age of 65 do not consider themselves "seniors." Most steer clear of government-provided senior centers and services. Indeed many in the boomer cohort are not even eligible for services due to income level or age. Moreover, boomers can be suspicious of government—they may not necessarily view local government as a resource. For their part, senior center staff are sometimes reluctant to stretch beyond their comfort level with the senior-center model and the services they've historically provided. Local government, nongovernmental agencies, and other organizations may be offering services and programming based on outdated demographic data and consumer trends. Acknowledging these perspectives and being willing to move beyond them are important first steps in reaching boomers and ultimately involving them in planning and community development at the local level.

Insider language and processes can inhibit participation. Important potential stakeholders in your planning process may not be familiar with local government jargon, meeting formats, processes, funding streams, and solutions (housing development or transportation infrastructure, for example). They may be reluctant to participate in an effort they don't fully understand. Reaching out to potential stakeholders and arming them with basic information before they attend events will boost the success of both the events and your overall aging well planning effort. Effective communication channels include web-based tutorials, CDs, primers, brochures, and email newsletters.

Deciding What Role Local Government Should Play

An article in *Public Management* describes two approaches to engaging residents in local government affairs:

- **The "vending machine"** is the traditional way of viewing of local government—as a service provider. You drop in $0.75 in taxes or fees and expect the machine to dispense at least $0.75, or often $3.50, in services.
- **The "barn-raising"** brings citizens together to solve community challenges, just as families came together in earlier days to construct a barn. According to the article, "... the barn-raising approach promotes citizen responsibility as opposed to the passive consumption of services."

The issue of aging well is far too large and complex for local government to tackle alone. Local government may begin the conversation and facilitate discussion along the way. But identifying issues and developing solutions requires the participation and contributions of all stakeholders—public, private, and nonprofit providers of health care, human services, housing, recreation, transportation, and education; local government; residents; and community organizations and institutions.

Look for ways to cast local government as a convener, conversation starter, and facilitator, not as a vending machine waiting for input to dispense solutions. Consider involving key organizations and groups through co-sponsorships. The City of Palo Alto, for example, co-sponsored its planning process with Avenidas, a major nonprofit provider of older adult services in the community.

One question that may arise is whether to treat the aging well planning process separately or include it as part of a larger visioning or community improvement effort. There are two general approaches:

- **Communities for a Lifetime** focuses on building elder-friendly communities. Sponsored by the Florida Department of Elder Affairs, Communities for a Lifetime helps communities become better places for older adults to live and gives all residents the opportunity to contribute to improving their communities.
- **Sustainable Communities for All Ages** advocates viewing the need to plan for an aging population as an opportunity to create policies and programs for the full lifespan and simultaneously sustain a healthy environment. This approach seeks to maximize human and financial resources by looking for single solutions to multiple problems. Rather than focusing solely on aging community members, it takes on concerns that affect everyone and looks for solutions that benefit multiple ages and groups.

Your readiness, resources, culture, planning experience, priorities, and preferences—essentially the unique characteristics of your community—will determine whether you choose to approach aging well as a separate issue or embed it in an overall community improvement initiative. However you decide to approach aging well, keep in mind that good planning benefits the entire community—across the lifespan—regardless of the capabilities of individuals in the community.

Forming a Planning Committee

Establishing a planning committee that reflects your community will help ensure that diverse points of view are represented and heard throughout your planning process. It will lead to a more accurate understanding of the community's strengths, challenges, and priorities for aging well. And it will give legitimacy to solutions and foster a shared, long-term commitment to implementing them.

Involving multiple local government departments and divisions is important, but the planning committee should not consist of local government staff only—this approach creates an expectation among the community that local government will be the vending machine, and it does not provide the broad perspective necessary for successful work.

When selecting committee members, work toward building community-wide ownership and reach out to all sectors, including groups that may be less likely to participate. Be sure to involve residents, community leaders, and key organizations and institutions. Consider including a representative from your local Area Agency on Aging (AAA) to bridge the gap between local government and county/regional entities that share common concerns and interests around meeting the needs of older adults. If you have decided to co-sponsor your aging well planning process with one or more key agencies, their representatives should co-chair the planning committee and lead some of the subcommittees. Once your planning process is underway, planning committee members can also direct action steps as they're identified.

WHO SHOULD BE ON YOUR PLANNING COMMITTEE?

Consider including these community and government representatives in your planning committee:

- **Residents**—Representatives of neighborhood associations, senior housing complexes, and independent/assisted living facilities, especially boomers who have the most to gain
- **Local government**—Department heads or other key staff from planning, housing, public works, engineering, traffic, community services, parks and recreation, the city manager's office, building/code enforcement, and public safety; local government commissioners (such as planning, housing, and parks and recreation)
- **Housing/building**—Architects, nonprofit housing developers, real estate brokers, apartment owners/managers, housing contractors
- **Transportation**—Regional transit authority, taxi/shuttle services, senior transportation providers
- **Health care**—MDs (particularly geriatricians and internists), RNs, home health providers, clinics, hospitals, mental health practitioners, alternative health care providers
- **Community services**—Parks and recreation staff, fraternal groups, YMCA, YWCA
- **Education and lifelong learning**—Teachers, administrators, and governing board members from community colleges, universities, adult schools, and centers on aging; library representatives
- **Public safety**—Police, fire, emergency medical services (EMS), disaster-preparedness agencies
- **Business**—Chambers of commerce (including ethnic-specific chambers), retailers, restaurants, gyms/fitness centers, major employers (especially of boomer-age adults)
- **Faith communities**—Churches, mosques, temples, clergy and laypeople
- **Senior service providers**—Senior center staff, meal providers, AARP, representatives from Area Agencies on Aging and Adult & Aging Commissions
- **Volunteer organizations**—AARP, AmeriCorp chapters, Senior Corps/RSVP (retired and senior volunteer program), SCORE (retired executives), service clubs, League of Women Voters
- **Arts and culture groups**—Local historical societies, state arts boards and cultural councils
- **Community-based advocates and providers of services for people with disabilities**—Independent living centers, legal services agencies, health care access coalitions
- **Organizations representing diverse groups in the community**—La Raza, Southeast Asian mutual aid associations, groups representing the lesbian, gay, bisexual, transgender, and transsexual (LGBT) community, and other organizations
- **Media outlets**—Regional broadcast and print media; daily, weekly, and monthly neighborhood newspapers; college- and community-produced television access programs

Choosing the Right Language (Don't Call Them Seniors)

The language you use to publicize and conduct your aging well planning process can significantly help or hinder your ability to attract and engage boomers. It's important to choose your words carefully and frame your effort in ways that resonate with your audience.

Don't get stuck in the past. Traditional phrases, such as "senior citizen" and "elderly," are not terms boomers identify with—in many cases, they reject these terms outright. The Harvard School of Public Health and the MetLife Foundation partnered with PARADE magazine to invite readers to suggest new language that better reflects changing attitudes toward aging. Among the 4,000 responses received, the most popular term suggested was "prime time." Other suggestions included "age of dignity," "Life 102," "re-generation," "rewirement," and "givebackers."

In a survey conducted by the Journalists Exchange on Aging, professional journalists who cover aging issues concurred that the terms "elderly" and "senior citizens" are outdated. As alternatives, they suggested "boomers," "middle-age(d)," "midlife" and "older" (people, adults, individuals).

Understand what drives boomers. The events of the 1960s shaped many of the attitudes of the boomer generation. As a group, boomers tend to be idealistic and driven by causes. They believe they can change the world if they unite their voices and efforts. They tend to be rule-breakers. Many boomers are highly educated. Theirs is the first generation in which a majority went to college. These days, many boomers must strike a balance between demanding work schedules and a busy private life that may include both children and their own aging parents. Author, trainer, and business coach Anne Loehr recommends using these key words and phrases when communicating with boomers: "make a difference," "consensus," "team," "experiment," "try new things," "save time," and "imagine if."

Focus on assets, not deficits. A growing population of older adults presents certain challenges. Yet there are also many positive aspects to this change that should be recognized and cultivated. There can be a tendency to think of older adults as a high-risk or vulnerable group that is going to drain public and private resources. If this becomes the tone of your aging well planning process, it is likely to deter participation and frighten off important partners. Focus instead on the numerous valuable assets older adults bring to their communities, such as discretionary income, time to devote to service and civic affairs, professional skills, advanced education, and experience.

TERMS TO AVOID		TERMS TO USE
Elderly	→	Older adults, boomers
Senior citizens	→	Elders (for those in much later life)
Baby boomers	→	Boomers
Old age	→	Prime time, midlife
Volunteering	→	Serving your community, civic engagement
Limitations	→	Adaptations

Developing Cultural Competence—More than Just Translation

The majority of communities in California are diverse—a mix of people from different cultures, races, and ethnicities; of different genders and sexual orientations; from different socioeconomic backgrounds. And California communities are projected to become even more diverse over time. Your planning process must be inclusive, reaching and engaging all the diverse groups in your community. It is particularly helpful to reach out to leaders of specific groups at the very beginning of your process. These leaders can, in turn, build support and encourage participation among members of their groups.

Different cultures view aging and elders differently, including when someone actually becomes an "elder" or "older adult." Consider these differences and design your outreach and engagement strategies accordingly. For example, reaching older family members through their children or grandchildren enrolled in public schools may disrupt cultural norms and run counter to the relative positions and appropriate interaction between youth and adults. Be sure to account for the role families may play in caring for older adults. Multigenerational families living in a single household is the norm in many cultures, and this has significant implications for aging well planning.

To gain input from people with limited proficiency in English, it may be necessary to translate event proceedings and materials. Yet translation alone will not suffice if other cultural barriers, such as past experiences, have not engendered trust or credibility. A better approach may be to recruit bilingual, bicultural members of target groups and train them to facilitate various aspects of your planning process.

Refrain from imposing your own views and values about aging on the process, whether they reflect mainstream America or your own ethnic or cultural group. The goal is to draw out, respect, and respond to a variety of needs and points of view. This will help ensure accurate, reliable, and complete information for your aging well planning effort.

For more information, see "Beyond Translation and Tokenism," listed in the reference section.

Gathering Data

Each of the three key aging well planning activities—resident surveys, public forums, and focus groups—can generate different information from different segments of your community at different times. The activities you conduct and their order depends on the needs, priorities, and resources of your community as you progress through your aging well planning process.

- **Surveys** generally use closed-ended questions that lead to quantitative information about community perspectives on multiple aging well topics, such as housing, transportation, and community services. Some communities, such as the City of Chino, use a survey to launch their aging well planning efforts—the survey sparks interest, gathers an initial data set, and encourages community engagement in the process.
- **Public forums** usually bring residents and organizations together to identify the major issues and themes that are important to these groups. Survey data can help inform topics for discussion at public forums. Or you could follow the City of Palo Alto's lead and use your public forum as an initial visioning meeting to engage residents and community partners in defining their future. Or you could hold a final public forum to present information gathered through earlier forums, surveys, and focus groups; achieve consensus on short- and long-term goals; and develop action plans.

- **Focus groups** are typically used to probe deeper on particular issues. In contrast to surveys, focus groups use open-ended, relatively broad questions to produce qualitative, in-depth information on key issues or to generate data from groups that may not have been well represented in surveys or public forums. Focus groups generally follow surveys or public forums—they can clarify ambiguous survey data and elicit more specific information about themes that emerged from a survey or forum.

Surveys, public forums, and focus groups are all part of the initial data-gathering and community engagement process. Through these activities, you will identify existing community strengths and issues to address in subsequent planning efforts. You will also strengthen commitment to the ongoing process among all sectors of your community. Keep in mind that the data-gathering process should be iterative—you should continue to gather and assess data throughout your aging well planning process. Then use this data to refine your process, goals, and action steps.

Reporting & Using Your Results

Update your planning committee with the results of data-gathering activities as they occur—each step in your planning process should inform the next step.

Because participants in your surveys, forums, and focus groups contributed their ideas and time to the process, send them a report with results and any planned actions as soon as possible after each event. Keeping participants in the loop is a good strategy for maintaining their interest and engaging them over the long term. Those participants who seem particularly interested and enthusiastic may be good prospects for future commission appointments or other forms of civic engagement, so be sure to develop a system for tracking those participants, keeping them informed of progress, and notifying them of upcoming events.

You may wish to present the results of each activity in your aging well planning effort to elected officials and governing bodies of partner agencies, or wait until you have completed all planned activities before making a final report. One advantage of presenting results after each activity is that results may inform immediate decisions and prompt specific actions as elected officials and staff consider Capital Improvement Plan (CIP) budgets, use of Community Development Block Grant (CDBG) funds, Redevelopment Agency projects, affordable housing initiatives, investments in transportation or infrastructure, and other ongoing efforts. The same is true for the governing boards and elected officials of partner agencies and their processes for resource allocation. Reporting as you go also sustains momentum for your aging well planning process and reinforces the commitment of key officials and organizations to the effort.

Regardless of when you present your report, it should not come from any one department or agency. Instead, partner agencies and residents, as well as key local government staff (housing, planning, engineering, public works, city manager's office, etc.), should all have prominent roles in presenting the report to policymakers and governing entities. This reinforces the message of shared responsibility and joint leadership, and can strengthen key partners' commitments.

Use your report to build on the momentum your aging well planning effort has generated by identifying a few immediate actions that community agencies and local government departments can take. If you're formulating a more specific action plan, include short-, mid- and long-term goals to foster engagement in and commitment to an ongoing process.

Circulate the results of your aging well planning process throughout the community. Use local media outlets to publicize key results and generate public interest and engagement.

Be sure to update the community as information gathered during various activities influences key decisions, and as the community makes progress toward achieving goals and action steps. Posts on local government and community partners' web sites, mailings to residents, PSAs on your local cable station, and articles in recreation bulletins and partner newsletters are just a few ways to keep your community informed and engaged in planning for aging well.

If you can answer yes to the questions in the checklist, you are ready to get started with the guides in this toolkit:

- Conducting Aging Well Resident Surveys
- Conducting Aging Well Public Forums
- Conducting Aging Well Focus Groups

CHECKLIST—COMMUNITY PLANNING FOR AGING WELL

- ☐ Have we defined the role of local government as convener and facilitator?
- ☐ Do we have a strong and inclusive planning committee that reflects our community? Are its members committed to a long-term planning process?
- ☐ Are there important agencies or associations we should engage as co-sponsors of the process?
- ☐ Do our elected officials understand the importance of aging well, and that we are embarking on a long-term community process to create an environment that facilitates and supports aging well?
- ☐ Have we decided on the specific tools we want to use, and in what sequence?
- ☐ Have we agreed on some common terms and an approach that will attract boomers and overcome their avoidance and denial of aging issues?
- ☐ Do we want or need to do any advance education to help ensure that participants have sufficient background knowledge to feel comfortable participating and to contribute effectively to various aging well planning events?
- ☐ Have we developed culturally competent strategies to engage members of our community's racial, ethnic, cultural, language, gender, and LGBT groups, and to ensure their voices are heard?
- ☐ Do we have a communications plan for sharing results and ongoing aging well planning actions with elected officials, governing boards, event participants, and the larger community?

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FOR MORE INFORMATION

This community planning overview is part of Aging Well in Communities: A Toolkit for Planning, Engagement & Action. This toolkit also includes guides for resident surveys, public forums, and focus groups; case studies; and a list of aging-related resources. For the complete toolkit, visit http://www.civicpartnerships.org/docs/services/CHCC/aging-well.htm.

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