

City Leaders Institute

on AGING IN PLACE

RECAP OF DAY 2 **TUESDAY, MAY 8, 2012**

Participants:

Amy St. Peter	Maricopa Association of Governments	Human Services & Special Projects Manager
Michelle Dionisio	Benevilla	President
Cindy Ensign	Human Services Department, City of Scottsdale	Planner/Budget Specialist
Moe Gallegos	City of Phoenix	Deputy Human Services Director
Deanna Jonovich	City of Phoenix	Human Services Director
Mary Lynn Kasunic	Area Agency on Aging, Region One	President & CEO
Jim Knaut	Area Agency on Aging, Region One	Senior Vice President Contracts
Carol Kratz	Virginia Piper Trust	Program Director
Joe La Rue	Sun Health Senior Living	President & CEO
Greg Stanton	City of Phoenix	Mayor
Andrew Scharlach	University of California at Berkeley	Eugene and Rose Kleiner Professor of Aging
Kristie Sharp	Atlanta Regional Commission	Volunteer & Special Programs Manager, Area Agency on Aging
Sue Robinson	Partners for Livable Communities	Senior Advisor

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OVERVIEW

Both the **resources of the Phoenix Civic Team**, assembled through the City Leaders Institute, and the **changing demographic profile of Phoenix's aging population** provide a meaningful opportunity for change.

At the beginning of their breakout session, the Phoenix team and experts addressed the fundamentals of their issue statement. Through a facilitated discussion, participants explored the heart of their issue: **How do we respond to the *diverse needs of older adults while recognizing there will need to be changes in service delivery?***

Through this process, the team explored the challenge of how to keep seniors socially engaged, and they discussed a range of responses to addressing it. Participants explored new ways of delivering services that involve the whole community and ways of engaging all generations. As one guiding principle, participants valued the creation of a community-driven program for developing pilot models that are sustainable for the entire range of income levels. After several hours of dialogue, the team revised its original goal statement and prepared a 12-month action plan for implementing it.

Original Goal Statement:

The goal of the Greater Phoenix Civic Team initiative is the development of new and enhanced service delivery mechanisms to connect older adults with their peers and with the community, to provide relevant activities and services, and to leverage their talents.

Revised Goal Statement:

The goal of the Greater Phoenix Civic Team initiative is to develop and implement sustainable Aging in Place models to:

- Connect to services
- Connect socially
- Improve health and wellness
- Create opportunities to use talents and give back to the community
- Leverage resources (human, financial, built environment and organizational)

12-month Road Map for Action:

1. Establish leadership/advisory group(s), how it operates, & its combined resources – target date: June 1, 2012
2. Scope out and secure initial Technical Assistance – target date: mid June 2012
 - a. outline what we have to offer: \$, technical assistance
 - b. criteria for participation, # of models/sites, goals, rolling deadlines/start dates

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3. Research: best practices, lessons learned, and models through existing data sources and team member interviews – target date: June 2012
4. White paper: present concept at regional level – ex. MAG Human Services Coordinating Committee and Regional Council, other interest groups (political will) – target date: Sept. 2012
 - a. send out letters to inform communities – higher level vs. neighborhood level
5. Providing information at community/local stakeholder group meetings (community will) – target date: Oct. 2012
 - a. inviting: municipalities, nonprofits, faith communities, homeowners/neighborhood groups, etc.
 - b. invite/focus: potential sites/neighborhoods
6. Request letters of interest (LOI) – target date: Nov. 2012
 - a. Ask people to indicate what they would do, what support is needed, what community issues to address
 - b. Who is invited to apply? What is criteria? What resources do the others/non-selected get?
7. Develop and release request for partnerships (RFP) with technical assistance – target date: floating date/Jan. 2013
8. Pre-proposal conference (targeted audience) – target date: Jan. 2013
9. Create criteria to evaluate proposals – target date: Feb. 2013
10. Evaluate proposals and select partners/participants – target date: Feb. 2013
11. Determine structure for implementation (what do we have to offer?) – target date: March 2013
12. Roll out projects and assist local communities in implementing – target date: April 2013

SUMMARY OF DISCUSSION POINTS: MAJOR CHALLENGES AND RESPONSES

Review of *Original Issue Statement*:

The Greater Phoenix region is not prepared to fully meet the socialization needs of people aged 60 years and older given the dramatic increases in population and their diverse needs. Senior centers provide critical services, but the changing nature of the expectations, needs, and demands of this diverse customer base coupled with reductions in public and non-profit funding sources have increased the difficulty of providing appropriate services to this group. Additionally, the talents of older adults are often untapped opportunities and not always viewed as resources. This initiative is inclusive of, but not exclusive to, senior centers. **The issue is how to keep people socially engaged in the most effective way possible.**

A. Challenge: Identifying available resources and increasing public awareness of resources

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- The capacity of local government is diminished, which has a negative impact on senior centers.
 - There isn't funding to modernize.
 - "All of our centers are just bare bones."
 - Some are closing adult day care programs.
 - Homecare has been closed to new clients for 2 or 3 years. Someone dies before someone else can get into a new slot.
 - City perspective: The senior centers and senior budgets have actually been protected.
- There is a public mentality that senior services are *free*.
- Facilities are expensive to administer.
- Transportation resources are a major issue, especially for senior centers that are not within a walkable distance.
 - "At age 85, you do not just decide to take transit for the first time."
 - Every year, we have seniors killed crossing the street. We have "school zones" why don't we have universal "safety zones" or "senior zones."

A. Responses:

- Be realistic about budget constraints.
- Look at alternatives to the traditional system.
- Create a resource tool to identify the connections. There is a lot out there that people don't know about.
 - Someone doesn't know what human services is until she has a parent who is in trouble.
- Create a comprehensive list of all the assets. We have so many assets, and we are not tapping into them.
- Leverage the resource that we have.

B. Challenge: Changing demographics and needs of the senior population

- Today's younger seniors have:
 - Higher incomes
 - More education
- Today's younger seniors are more concerned about:
 - Quality of life
 - Staying connected and engaged
 - Driving
- In the recent years when economy was better, seniors wanted their own place. Recently, more seniors are saying that "we really should be with others."

B. Responses:

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- Phoenix has a lot of these types of communities that are mixed age. We need to work to embrace future options. “Right now I’m not going to go to a senior center, but when I’m older I might. We need to get the community to understand the options. I may end up in a nursing home, which needs to be part of the community too.”
- Perspectives change over time. Who knows where we’ll be when we’re 70? Individuals change overtime too.

C. Challenge: Phoenix’s built environment and transient population

- Phoenix has a more transient population, and in some cases it does not have neighborhoods in a traditional sense.
- However, in some cases, Phoenix does have historic and neighborhood districts. The city has established names of neighborhoods, which do have their own personalities.
- The physical and geographic layout of the city varies and can work against senior engagement.

C. Responses:

- Because this area is so diverse, in whatever we do we have to be mindful of pilot projects that represent the communities.
- How do you create a village that is generated from a neighborhood?
 - Start from historic neighborhoods that have cohesion anyway. Use existing resources such as newsletter and community activities.
- Leverage connections to faith-based initiatives.

D. Challenge: Limits of the current senior center models

The age groups throughout Phoenix’s senior centers vary by site. City/urban-based centers are more multi-generational. Outside of Phoenix, communities are smaller and it is 5 to 10 miles to the next community. In this context, centers tend to be co-located in a city building and a lot of those centers are one big room with a kitchen. They are not as conducive as a co-location/parks-and-recreation model, which has smaller rooms.

- Senior centers are not part of the greater community.
 - If senior centers are, then it’s by virtue of their leadership.
- In a recent focus group of senior center managers, none of the managers wanted to go to their own senior center.
- It is hard to balance the needs of people currently using the center with those who could potentially use the center.
- The term “senior center” deters the younger population.

D. Responses:

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- Let senior centers be what they are. They serve a population. How do we reach all those other people?
- If the goal is helping people with nutrition and engagement, there are zillions of ways of doing that.
 - A physical structure is one way, but not the only way. A structure can be operated by the city or as part of a campus, nonprofit, or church. There may be people who never go into senior center, but are in a church every Sunday.
 - There is a real question about whether it's effective to lure new audiences into a senior center. It gets fuzzy. You have to start thinking outside the box. Build on the resources that people are connected to.

E. Challenge: Whose responsibility is it to coordinate resources?

- One point person is appealing – it's tailored around the community saying this is what we need and this is how we connect to it.
- Leadership groups can be empowered and know how to help. Do you work with libraries and YMCA? Another point of entry.
- Maricopa has mobility managers (funded by section 5310). A target demographic is already built into that funding source.
- Transit ambassadors give referrals through a MAG program. It helps through formal, local government, and informal networks.
- People don't call even though there is a ton out there. It's getting that stipend/volunteer in the community – the person to call. We can educate those people.
 - Who in my neighborhood can refer? I trust them to give referral. You always ask somebody who you trust.
- The calls flood in. I don't feel like we need more calls. I'm not sure if we first need to list the resources, community needs, and bridging them.
- I want to *go beyond the capacity*. I don't want to have this public awareness campaign and then there is a waiting list.

E. Responses

- Maybe it's not our responsibility to solve all of this. Maybe we need to go back to the community and help them figure out solutions that use public monies. The village model is implemented in a bunch of different ways. Some of the villages are volunteer. Some are convents. Some are not so formal.
 - The village is a way to coordinate and know who to call when you need help. Because they are all part of this one community, there is a connection. The village concept is taking that idea among people who don't have that connection.
- There are trusted organizations within a community that use a lot of volunteers, including skilled and talented older adults. We've got the pieces but nobody has

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- thought about these options or a continuum. How do we rethink this array of things, including giving back to the community?
- A dedicated person in every neighborhood.
 - It's like a block watch. There are a lot of resources. Nobody cares about it until they need it. If they knew to talk to the person in their neighborhood.
 - Develop a *coalition* of partners that includes corporate commitment.
 - Develop a *volunteer* base.
 - Ex. Train Encore volunteers to be community leaders.

SUMMARY OF DISCUSSION POINTS: PILOT PROGRAM

The Phoenix Civic Team recognizes that changes happen at the local level. They are developing a pilot project with the future goal of scaling it up to the regional level to increase its impact. Through the planning of their “Road Map for Action,” the team discussed various implementation strategies. The following is an outline of those ideas.

A. How should we select locations for pilot programs?

- What are the **indicators of readiness** of a community?
 - Needs assessment
 - There is already interest expressed through various channels:
 - Area agencies that want to look at the village model
 - ASU
 - AARP
 - MAG
 - community contacts
 - People self-identify with the place, for example Avondale
- What is the capacity of the neighborhoods?
- Replicate the model of CLI – give communities a little bit of money and technical resources. What we need is a city/community that is interested in moving and doing something. You can target ones or have communities come to you.
 - Civic team/coalition/partners provide TA for communities that can really bring the key folks together and have impact. They have to do their own work to show they are ready. If they can't mobilize, then you're going to be pulling your teeth again.
- Some of it has to come from the “ground up” as well. Community leaders tell us what that would look like in their community. We'll help you understand a number of different approaches that are out there. There are all these different variations. We'll have some basic principles, but will let there be modification by the community.

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B. How should we revise the team's goal?

- Revising the goal to be more targeting.
 - Indicators of readiness – Request for partners.
 - Parameters of success – all models should engage older adults as resource.
 - Identify measures of success.
 - How to sustain success.
- Need more info on the possible models.
- We want to pilot something – village and other models that we're not really sure about yet.

C. What should be the objectives of pilot projects?

- Seeing local community “take responsibility” for looking after their neighbors, and not blame the social service network that is out there.
- Building communities where I want to live.
- Educating people on how to connect.
- Measuring that people are more connected to services to help them stay in their homes and have opportunity for engagement.
- Bringing partners to the table.
 - ex. Sun Health, <http://www.sunhealth.org>, brings resources to the table.
- Empowering people.

D. What should be measured as part of the pilot projects?

- Community responsibility: knowledge of and connection to services
- Hospital admission/re-admission rates
- Access to home-based medical care
- Community engagement and empowerment: rates of volunteering
- Assessments of the built environment (ASU partnership)
- Identification of better ways for helping seniors
- Data for baseline metrics:
 - Center for the Future of Arizona: Arizona Gallup Poll, <http://www.arizonafuture.org/az-we-want/index.html>

SUMMARY OF DISCUSSION POINTS: BRAINSTORMING THE “ROAD MAP FOR ACTION”

In building the “Road Map for Action,” the Phoenix Civic Team discussed many issues and options that underpin their planning direction. The following is an outline of the ideas implicit in the Road Map and stated by participants during the discussion.

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A. Considerations for the Planning Process

- Focus on alternative services that can be done more economically.
 - When we pay an agency the price is higher than paying a friend/neighbor in the community. Would rather have a neighbor or friend in your house than an agency. “If you’ve got friends and neighbors, it’s a much cheaper model.”
- Encourage innovations. Do not “presume the models,” ex. Hybrid NORCs
- Need to educate all levels, starting with civic leaders, about the types of models.
 - Need a deep-enough understanding of all the models to understand how to adapt them.
 - Research should include failures and cautionary tales, examples of why things went wrong.
 - ex. failures with undercapitalized resources (human capital, knowledge, energy, organization to develop and create something/new business).
 - Need a mentor/content expert to do a presentation on the different types of models.
 - If you’re going to teach and do a workshop, you have to educate our communities about what they would need to have a village concept.
 - Provide an overview of what this would mean to those who are possibility interested.
- Development becomes a dialogue with the community.
- Don’t try to do the whole city at one time. A letter of interest to work with us to develop it.
- Consultants help craft the proposal that is being submitted. Technical assistance to communities that are submitting.
- Focus on sustainability: we can get you to launch, but what about sustainability?
- Include a mix of stakeholders, ex. nonprofit approach things from a different angle than government
- Develop subcommittees to utilize and implement the expertise.
- Change requires new energy. You have to invest to get back. That investment frees things up and gives people the opportunity to try new things. Think about the example of creating a new school – a bunch of parents getting together would need specialized things (knowledge, resources, etc). What kind of help are these communities going to need?
- Be careful to not plan out the whole project before you bring the partners in. Needs to be more of the come in and helps us develop. The blue print is more of the plan for this group.
- Avoid an elaborate application process

B. What resources do we have to offer pilot projects?

- “You are offering assistance to the early adopters.”
- Knowledge

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- Technical assistance
- Evaluation
- Lessons learned
- Connection to an ongoing regional network
- Identifying county-level stakeholders
- Building consensus
- Matching funds
 - Matching for TA or partial implementation grant from Piper Trust

C. Sustainability

- No funder (private or public) wants to invest money into something that is not sustainable.
- Include the sustainability piece up front.
- Need to make sure that we are representing all people.
- We shouldn't set up an expectation that we are going to give you money. It is more about bringing people together for the common purpose. Need to get people to think differently. It's more about leveraging resources.
- We need to think about the people who have money.
 - Ex. Home delivery – those people pay for their meals. When we're developing this model, we need to recognize that people contribute to their ability.
 - "We start looking at how volunteering contributes and how people give their financial resources"
- Consider estate giving to the community
- You can't force a scenario, and it has to come from the community.
 - Consider outreach to homeowners associations. How do we get the *little* communities to come to the table?

D. Opportunity Fund: \$6,000 Ideas

- Stipend for organizer (ex. Encore volunteers, VISTA, interns)

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SUMMARY OF DISCUSSION POINTS: BEST PRACTICES AND LESSONS LEARNED

Civic Team members and experts noted a number of best practices in Arizona and beyond that could inform their planning. The following outlines those examples mentioned.

A. Arizona

- **Scottsdale's** “brokerage concept” for creating a one-stop hub – launched a capital campaign to renovate space and bring in nonprofits to provide services catered to seniors.
- Example of overcoming a “territorial issue” to create shared benefits.
 - **Helen Drake Senior Center:** church wanted to partner to put in a field/walking track. Had to negotiate with the seniors and highlight the benefit to them.
- **AmeriCorps** grant for exercise and health education - several of the centers not happy with us being there. “Ask the current population to welcome the new blood.”
- **Bistro example:** We get packed houses in our bistro and it doesn't affect the senior center, but we're reaching another demographic of seniors who want a restaurant style meal and happy hour.
 - Concern of funding changes - will there be a point where the cities will say we can't afford to pay for it? The more we can offer a lot of alternatives, it is a good thing.
- **Robert Wood Johnson** grant – parish program
- **Sun City** area – some hiring of parish nurses. In **Sun City Grand**, it is a happening place.
- **Stephen ministers** – friendly visitors.
- In the 1980s, there was a special grant for a case manager for **Sun City** because they did not want to be a part of the AAA system. As seniors aged, they pulled down the shades and disappeared. You were an outcast if you weren't out there playing golf.
- **Phoenix Revitalization Corporation: Leadership Academy:** <http://www.phxrevitalization.org/leadership/academy/index.htm>
- Scottsdale Leadership, <http://www.scottsdaleleadership.org>
 - In the last 3 or 4 years, human services has greatly benefited from it. Up and coming professionals who have lots of contacts are able to pick projects that different age groups can buy into and leverage different resources.
- **Melrose on Seventh Avenue Street Fair** – annual festival, community pride, <http://m7streetfair.com/>
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B. Outside Arizona

- **Atlanta** example – marketing with zumba and new menu. Stay away from focus on “senior center.” Participation shifted from a couple hundred to thousands. Some have wait lists. The funding came through a capital campaign.

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- **Southern California** example with 2 entrances for parks & recs side and senior side. It doesn't say "senior center."
- **Senior Centers Without Walls**
- **NORCs**. Ex. of successful **East Point**, GA, <http://www.eastpointcity.org/index.aspx?NID=814>
- **"Aging Improvement Districts"** – New York City, <http://www.nyam.org/agefriendlynyc/initiatives/current/aging-improvement-districts.html>
- **Westchester County** (Mae Carpenter) – use AAA as a resource to help different communities with program develop efforts that are different from each other, but use the support of the central core.
- **National Village Gathering**, October 15th-17th 2012, Atlanta, Georgia, http://vtvnetwork.org/content.aspx?page_id=22&club_id=691012&module_id=115999
- Aging in Place in **Israel**: <http://en.eshelnet.org.il/files/img/dynpdf/f454edf2e9e777.pdf>