



Older Dominion Research Event ***March 27, 2008*** ***Table Breakout Sessions - Discussion Notes***

Document Purpose:

This document is the compilation of all notes that were taken at the five-table breakout sessions during the March 27 *Older Dominion Project* (ODP) Research meeting held at the *Richmond Times-Dispatch*.

All March 27 ODP event attendees were divided into 5 Work Group areas.

ODP Work Groups:

Listed below are the Work Group areas and the ODP member attendees assigned to each Work Group.

It was pointed out during the meeting that:

1. ODP members should review and provide any input on any one or all five of the Work Group areas. While each Work Group was asked to focus primarily in one area, input was welcomed from all on any of the areas.
2. ODP members could switch Work Groups or serve on multiple Work Groups following the March 27 event.

Initial ODP Work Groups:

Table 1 – Community Readiness Work Group

Table Head – Linda Nablo

Scribe – John Judy

Members – Janet Areson, Mary Lynne Bailey, Henry Billings, Sherrie Brach, Dean Lynch, Nancy Roberts, Gordon Walker, Thelma Bland Watson

Note: Helen Cockrell will join this Work Group.

Table 2 – Information and Promotion Work Group

Table Head – Debbie Burcham

Scribe – Matt Thornhill

Members – Madge Bush, Judy Collins, Gail Jaspen, Tom Lappas, John Lewis, Darcy Oman, Katie Roeper, Christopher Murray

Table 3 – Statewide Database Work Group

Table Head – Dr. Richard Lindsay

Scribe – Jocelyn Tice

Members – Ed Ansello, Peter Boling, Kathy Fletcher, Christine Jensen, Paula Kupstas, Lou Rossiter

Table 4 – Healthcare/Long-Term Care Work Group

Table Head – Jay T. Thompson, III

Scribe – Christy Evanko

Members – Pat Farrell, Katie Fessler, Bill Kallio, Deborah Love, Bill Lukhard, Michael Matthews, Harry Turton, and Richard White

Note: Dr. Sheldon Retchin and Joel Mier will join this Work Group.

Table 5 – Workforce Readiness Work Group

Table Head – Jim Dunn

Scribe – Debbie Bain

Members – Dennis Flannery, Hugh Gouldthorpe, Kate Hall, Lyn Hammond, Judy Lyons, Tom Silvestri, Carolyn Thomas

Note: Lynn Schafer will attend this Work Group.

Work Group Assignment for March 27:

For the March 27 meeting, each Work Group was asked to focus on three primary assignments.

1. Review and provide additional comments on the ODP scope of work/goals for year 1, 5, and 10. As part of the initial ODP Kickoff session held on December 10, 2007, ODP founding members brainstormed a short, immediate and long-term scope of work/goals for the ODP. March 27 event attendees were asked to review these goals and make appropriate suggestions.
2. Provide immediate feedback on the ODP Residents' & Business Leaders' Studies – Topline Reports – as presented during the March 27 meeting. Suggest what additional analysis the Work Group would like SIR to perform on the data for inclusion in the final report.

3. Discuss in detail the most appropriate approach – goals, approach, team membership, timeline, resource needed, etc. for the assigned Work Group area. As part of the March 27 meeting, the table breakout sessions culminated with a report from each Work Group's discussion leader.

The content of this document recaps the discussion around these tasks. It should be used by each of the Work Groups to continue work in their respective areas.

Work Groups' General Discussions Regarding ODP's Goals:

Assignment: Review and provide additional comments on the ODP scope of work/goals for year 1, 5, and 10. As part of the initial ODP Kickoff session held on December 10, 2007, ODP founding members brainstormed a short, immediate and long-term scope of work/goals for the ODP March 27 event attendees were asked to review these goals and make appropriate suggestions.

A recap document of the original ODP goals (based on Dec. 10, 2007 meeting) was provided. Comments made by each Work Group regarding ODP goals included:

Table 1 – Community Readiness Work Group

- ◆ Make aging understood more as a lifelong process – intergenerational view and awareness – change negative image of aging. This is for the whole community, not just the older community. Perhaps impact of “Older” Dominion should be reconsidered.
- ◆ Needs to be gubernatorial initiative.
- ◆ Separate “facts” from fiction campaign – example, XX % say they have long-term insurance, but most studies show only X % have it.
- ◆ Ensure middle class (not poor or rich) service availability – poor will be taken care of by government, rich will be able to buy what they need. Middle class needs to be focus of services.
- ◆ Henrico County Citizen (bi-weekly paper) is sponsoring a “Boomer & Beyond Senior Show – August 2008 and also planning an upcoming Boomer series.
- ◆ Identify current projects and planning initiatives – best practices from other states.
- ◆ Need to narrow focus for early years – identify key issues, focus, and then to ensure a good start.
- ◆ Emphasize quality of services as well as quantity.

Table 2 – Information and Promotion Work Group

- ◆ When does year 1 end?
- ◆ Where and who will staff the effort?
- ◆ Reprioritize first year goals based on work groups.
- ◆ #1 Priority
 - Inventory best practices
 - Elevate the issues of aging
 - Create master metrics
 - Make it personal
 - Cloak it in other issues – intergeneration, green

Table 3 – Statewide Database Work Group

Additional considerations to add to goals

- ◆ Have greater distinction between employees and employers – there may be a disconnect between employers and employees.
- ◆ Perhaps have an employee survey to raise awareness.
- ◆ (Ex) mandatory retirement awareness.
- ◆ CEO's don't know how much care giving is impacting their employees and the time involved.
- ◆ Similar with employees with children and employees with older parents, or both.
- ◆ Work environment with Aging workforce
 - Different careers
 - Accommodating physical demands (ex. Nurse care)
- ◆ What do you do to accommodate the worker's physical abilities?
 - Depends on the industry
 - Nursing shortage is not if affected by this
- ◆ Caregiver workforce:
 - Middle-aged "kids" are "importing" their parents from all over the country.
 - These "kids" are employed
 - Companies are trying to create distance services
 - Maybe employers can help with this problem
- ◆ Interested in a worker caregivers survey current and later to measure the impact.
- ◆ Caregiver's role is changing.
- ◆ Institutions need to look at caregiver needs too.
- ◆ If employers want to keep older employees, then they should help with caregiving for elders.
 - This will help keep employees
- ◆ 45% of VCU workers who are elder caregivers care for both children and parents ("Dual Caregiving").
- ◆ UVA employee engagement survey.

- Work options is now an employee benefit
- ◆ How do you check on the quality and outcomes of elder care? (AHRQ)
- ◆ What are other states doing?
 - Indiana Study (per John Martin)

Table 4 – Healthcare/Long-term Care Work Group

- ◆ Group would like goals reduced, prioritized, and synthesized.
- ◆ Would like more specific action steps.
- ◆ Need representation for community planners; expand transportation representation.
- ◆ Need other government entities such as education (community colleges' roles in workforce).
- ◆ Increase up-front education for caregivers (instead of being crisis-generated).
 - Brochures for Senior Navigator, etc.
 - Where to go for information

Table 5 – Workforce Readiness Work Group

1 year

- ◆ Retain knowledge
- ◆ Workforce to care for aging
- ◆ Training the workforce
- ◆ Flexible schedules/job sharing
- ◆ Model/framework for planning
 - Get business community involved
 - Education about the issue
- ◆ Address generational (cultural) differences; awareness of these differences

5 year

- ◆ Strategic plan with metrics
- ◆ Triage/prioritize actions/goals
- ◆ Baseline research, trends

10 year

- ◆ Vision Statement
 - "Virginia is THE model"
 - "Aging a great part of the culture"
 - "Younger workers want to live and work here"

↓
Mixed Generation Culture

- ◆ Plan to get there
- ◆ Silos are for fodder

Discussions Regarding the March 27 Topline Research Reports

Assignment: Provide immediate feedback on the ODP Residents' & Business Leaders' Studies – Topline Reports – as presented during the March 27 meeting. Suggest what additional analysis the Work Group would like SIR to perform on the data for inclusion in the final report.

The following ideas/requests were offered to SIR in preparation of the final research report:

Table 1 – Community Readiness Work Group

- ◆ Show differences by age, ethnicity, urban vs. rural, region of state.
- ◆ Facts vs. fiction; perception vs. reality – (see 3rd point of Goals above).
- ◆ What are the “stay at home” challenges, personal care challenges (grocery, cleaning, etc.)?
- ◆ Non-profits should be able to make money providing needed services.
- ◆ Faith community involvement will provide needed services as well.
- ◆ Social services.
- ◆ Small business issues – underrepresented in business sample – employ many people and have biggest challenges to providing for workers.
- ◆ With more working, will non-profits suffer volunteer shortage? Or just need to redefine what volunteers do?
- ◆ Different type of volunteers – Boomers will want to use intellectual capital.
- ◆ Effort to convert retirees to second career or volunteer.

Table 2 – Information and Promotion Work Group

Follow-up crosstabs suggested:

- ◆ Diversity
- ◆ Income split – \$50K
- ◆ Rural/non-rural
- ◆ Self-reported health status
- ◆ Caregivers/informal support system
- ◆ Access points (naturally occurring)
- ◆ Share specific stories
- ◆ Don't raise awareness without simple solution to info/access
- ◆ Shared elder daycare

Table 4 – Healthcare/Long-term Care Work Group

Residents' Study:

- ◆ Cross tab income and employment with caregivers.
- ◆ Further define caregiver.

- What do you do to be a caregiver?
- Also include children, siblings, grandchildren, spouse
 - Not just caregiver of older parent
- Many Boomers care for both parents and children/grandchildren
- May require a separate study (or use of panel) with different definition of caregiver
- ◆ Do Boomers have the expectation that, as they age, others will care for them?
- ◆ If so, who are they expecting the caregivers to be?
- ◆ What is their plan, if they aren't going to do what their parents did?
 - New types of communities
 - Co-ops
 - Let Gen Y communication ingenuity help

Business Leaders' Study:

- ◆ Research says that 95% have a Pro-aging attitude.
 - Is that true, or are they just ashamed to say they aren't pro-aging?
 - Do their policies reflect this?
 - Example: retirement packages that are as good as working. To receive the benefit, you have to retire (i.e. no part-time option)
 - Will this change as there are fewer with retirement benefits
- ◆ Check statistic on the percentage that offers Long-term care insurance.
 - Should be less than 5%, not 35%
 - Maybe they are confusing it with Long-term disability
 - If 35% really do think they provide LTCI, but only 5% do, this is a problem

Table 5 – Workforce Readiness Work Group

Business Leaders' Study

- ◆ Small businesses challenged with offering flexible options (telecommute, flex schedules, etc.)
- ◆ Significant hiring needs, but still a tier 2 issue.
- ◆ ?? incentives for knowledge sharing.
- ◆ Recognition is important.
- ◆ Inclusive culture/workplace.
 - “Don't forget to teach your old dog new tricks!”

Discussions Regarding Specific Work Group Direction

Assignment: Discuss in detail the most appropriate approach – goals, team membership, timeline, resource needed, next steps, etc. for the assigned Work Group area.

The following ideas/next steps were advanced by each Work Group. Note: As part of the March 27 meeting, the table breakout sessions culminated with a report from each Work Group's discussion leader.

Table 1 – Community Readiness Work Group

Goal of This Work Group:

- ◆ Create a systematic guide or steps to follow for all communities across Virginia when it comes to age wave preparedness.

Potential Initiatives:

- ◆ Inventory current programs at local level – lessons learned from Charlottesville region and Fairfax.
- ◆ Package best practices/best models.
- ◆ Promote advantages of age-mix in community. How can we promote this?
- ◆ Create community planning preview tool – template for communities to check how they compare against other communities.
- ◆ Recruit private partners.
- ◆ Organize and present data/info so consumers can take action (holistic approach).
- ◆ Consider needs assessment tool.
- ◆ Recast aging as positive – intergenerational daycare

Related Issues Discussed:

- ◆ Local government employees and leaders – where are they at in terms of thinking about this issue?
- ◆ Education retirement issues – can retired teachers mentor?
- ◆ Have we educated the right touchpoints and resources about Easy Access and 211?
 - Discharge Nurses, Ministers, etc.
 - Give them tools
- ◆ “Caregiving” can mean elders caring for younger.
- ◆ Provide info and access to info.
 - Fulfill awareness

- ◆ How best to package “easy to do” solutions?
- ◆ Idea: HR department provide toolkits/instructions for caregiving; integrate it into life now.
- ◆ Diversity needs must be factored in.
- ◆ Needs to be presented as “opportunity” not a problem for communities.
- ◆ Make sure it is also a bottom up issues as well as top down – localities can push issues as well as react to state mandates.
- ◆ Important to all Virginians.
- ◆ Positive messaging – promoting/educating on livable community concept.
- ◆ What are the priorities?
- ◆ What about media involvement?
- ◆ How do we “create the buzz”?
- ◆ How do we keep momentum?
- ◆ Add small businesses, elected officials to ODP.

Next Steps for This Work Group:

- ◆ This work Group will hold a separate meeting to advance this ODP initiative:
 - Assess what’s going on statewide – what works?
 - Define what a “ready community” is
- ◆ This Work Group will report progress at the next ODP All-members meeting (to be scheduled for Mid-June 2008).

Table 2 – Information and Promotion Work Group

Goal of This Work Group:

- ◆ Explore ways to more aggressively showcase easy access to existing services that are available for elder caregivers and the elderly population (65+).

Related Issues Discussed:

- ◆ There is a lot of work underway in regard to actual services – Virginia Elder Drivers, Senior Navigator, Easy Access Web site, Senior and Adults with Disabilities.
- ◆ Are the Commonwealth and individual programs willing to own common strategy – want a public/private partnership?
- ◆ Would companies and media outlets (current and prospective ODP members) participate? Would they use leverage and/or donate media time?
- ◆ Could we line up pro bono communications company? What would production costs total?

Next Steps:

- ◆ This work Group will hold a separate meeting to advance this ODP initiative and will report the Work Group's progress at the next ODP All-members meeting (to be scheduled for Mid-June 2008).

Table 3 – Statewide Database Work Group

Goal of This Work Group:

- ◆ Create a shared, statewide database that would serve as a comprehensive resource for ODP partners and technical advisors. This database would potentially profile the state of aging Virginians (behavioral and health characteristics, use of community resources, etc.) and could serve as an assessment tool for several other ODP initiatives/Work Groups.
- ◆ Last database created in 1979 through VCU (statewide survey of older Virginians populated the database).
- ◆ Make this a shared resource.
- ◆ Need to know:
 - Behavioral and health characteristics
 - Use of community resources
 - What are they doing about maintaining their health?
 - Healthy elders will be found in the Health Interview Surveys. These are not giving us a picture of elders not in distress
 - Need a picture of what is common or varied among those who are healthy and not known to be unhealthy (survey) – in Virginia specifically
- ◆ Make this comprehensive: social, economic, care giving, healthcare perspective – Look at VHI data for example.
- ◆ Should acknowledge/leverage existing/various databases:
 - UAI – VA specific
 - MDS
 - BRFSS
 - HIS – Health Interview Survey
 - OASIS – Outcome Assessment and Info System; the home health equivalent of MDS
 - CARE – doesn't exist except in template form yet
 - National Nursing Home Survey
 - National Long-term Care Survey
- ◆ Should be able to assess the health of communities as they age – age wave preparedness.
 - Conduct follow-up waves over time
 - Want to be able to look at database over times/periodically to predict/anticipate change and needed proactive planning

- ◆ Should offer regional variation – should be large enough sample to breakdown for each AAA region.
- ◆ Should be actionable. For example:
 - How can we help families be self-sufficient?
 - Input into appropriate family health coverage, long-term insurance, etc.
 - Feed indicators of community wellness/age wave preparedness

Work Group Issues Discussed:

- ◆ How much of this should tie in to other studies/can tap into other sources:
 - National Long-term Care Study – state level
 - Compare to other states (as far as questions asked) – Is Virginia different from National statistics/other states? Or how different Virginia regions are different?
 - Look at BRFSS – has a sample per state
 - Senior Navigator
 - Other available computerized information sources?
 - Challenge: Some national studies' have small Virginia samples and/or only have a part of the issues related to aging
 - Challenge: Some only include healthcare; no Medicaid, no social data
- ◆ Availability of UAI?
 - Assisted living
 - UAI – entry into assisted living
- ◆ Should include all key audiences or just residents?
 - Health Insurers
 - Employers
 - Employed
 - Medicaid recipients
 - Caregivers
 - Healthy people
 - Sick people – how are we taking care of those who are sick or those at risk (protecting personal safety-eldercare)?
- ◆ Overarching issue – what do we really collectively want from this database – from a compilation/access point to all available relevant and meaningful secondary research profiling aging Virginians to a new, primary research-inspired database that works across all areas of Virginia (AAA levels)? Or both?
- ◆ It was agreed a consensus was needed in order to proceed – to get to a white paper that could be used for funding requests.

Next Steps:

- ◆ Group to meet at VCU in a month.
 - Next meeting goal: Reach consensus on broad direction of database in order to proceed with funding requests.
 - John Martin will organize and share current inventory of statewide surveys related to aging. Paula will share similar collection of surveys – perhaps include the MDS per Louis (there may be spin-offs of this) as there may be good for local variation
 - Group will discuss best way to getting accurate picture of aging in Virginia – database options, and use of database options if built.
 - Group may use informal survey to collect additional input on appropriate database.
- ◆ This Work Group will report progress at the next ODP All-members meeting to be scheduled for Mid-June 2008.

Table 4 – Healthcare/Long-term Care Work Group

Goal of This Work Group:

- ◆ Formulate the most sensible approach/greatest point of leverage the ODP should employ to help address healthcare/long-term care-related issues for Virginia’s age wave planning preparedness.

It was stated by the implementation team and recognized by this Work Group that 1) healthcare/long-term care issues are paramount to the success of the Commonwealth preparing for the age wave, and 2) the right approach for the ODP’s work in these areas should be based on very informed and thoughtful discussions. Thus, leaders of Virginia’s healthcare delivery system (Bon Secours, HCA, VCUHS, Sentara, etc.) and third-party payers (Trigon and Genworth) were placed on this Work Group.

Issues Discussed:

- ◆ Health insurance:
 - How do we involve state government most effectively?
 - How can we create the right ODP partnerships to study this?
 - Are there alternative models that have been discussed?
 - Medicare doesn’t cover long-term care, only acute care – but it is a federal model we cannot affect. How can we make a difference from the state level?

- How can we assume additional support can/should/will come from employers rather than the state?
- ◆ Long-term Care Insurance (LTCI):
 - Are there models with public, private, individual involvement?
 - What are the other state pilot programs doing?
 - There is a national standard (NAIC) but can people afford it? Can consumers understand it?

Next Steps:

- ◆ This Work Group will hold a separate meeting to advance this ODP initiative – specifically, to organize the Work Group around a thoughtful and sensible approach to extremely complicated issues. This may include the identification of one area to attack – such as LTCI – as a starting point for the ODP.
- ◆ This Work Group will report its progress at the next ODP All-members meeting (to be scheduled for Mid-June 2008).

Table 5 – Workforce Readiness Work Group

Goal of This Work Group:

- ◆ Formulate the optimal way to share the research findings and related insights from the ODP Business leaders’ Study.
 - Two-thirds of Virginia’s business leaders’ acknowledged the age wave will impact the economy – graying workforce and brain drain
 - A third said it will affect their company
 - Half feel prepared for the age wave
 - One-third would appreciate information/planning assistance

Issues Discussed:

- ◆ Add “knowledge sharing”
- ◆ We are dealing with a broad business base – one size does not fit all
- ◆ Do we need a practical “tool” for assessing scope?
- ◆ We need to inventory best practices we can share
- ◆ We need to humanize/give personality to the info
- ◆ We need to have a deliverable – to this end, there is a tremendous need for education/training/certification in the Ft. Lee area. Pointing and retraining today’s retiring workers across the Richmond region may help build an optimal model of preparing for and servicing and facilitating a graying workforce, a model that can be shared across the commonwealth.

Next Steps:

- ◆ This Work Group agreed to meet again to formulate specific plans regarding:
 1. Ways to disseminate the ODP's final report of the Business Leaders' Study
 2. Creation of an industry-specific pilot program targeting the Fort Lee area to showcase age wave planning in action and one with a direct benefit today
- ◆ The immediate next step is to create an interim planning group to identify the facts surrounding Ft. Lee:
 - Influx of population @ Fort Lee
 - Number and types of workers needed
 - Impact of Fort Lee
 - Healthcare system to handle the situation
 - Identify the appropriate professional association representation on this ODP Work Group (contact Denny Morris)
- ◆ Once materials/information are collected and the group is expanded, hold a separate planning meeting to advance Fort Lee older workforce planning concept, as well as brainstorm ways to disseminate key findings from the ODP Business Leaders' Study to business leaders across the state.
- ◆ This Work Group will report its progress at the next ODP All-members meeting to be scheduled for Mid-June 2008.