



Older Dominion Project Kick-off Event December 10, 2007 Table Breakout Sessions - Discussion Notes

This document is the compilation of all notes that were taken at the five table breakout sessions during the December 10th Older Dominion Project (ODP) Kickoff meeting held at Owens & Minor. The content of this document will now serve as input into the creation of a formal "topics guide" that will help direct the development of the two ODP surveys – business leaders and residents.

What Did We Learn Today That We Didn't Know?

On aging as a cause...

The word Aging is seen as negative.

Aging is a Lifespan issue.

In truth, all of us are dependent on others – the intergenerational linkages was a big lesson – "Old" is a bigger part of entire community.

What is good for older citizens is good for ALL citizens. Senior Community Planning Problem: Sometimes younger children are not welcome – this is a problem for some.

Recognize that elderly are not just 65+: with elderly demographic, there are different generations, culture diversity, different needs, and wants.

We cannot continue to "warehouse" our aging population.

Geriatricians, healthcare teachers, nurses face shortages.

State's demographics are changing dramatically.

There will be a significant need for older, aging workers – after traditional "retirement" to come back to the workforce.

There's a direct connection between aging services and quality of life ratings.

On age wave planning...

Age wave planning initiatives are going on around the country – at the state level and at the city level.

There's an inter-connectivity between seniors and other segments/groups.

Community improvements "run down" – improvements help ALL generations.

Around the country, there's a lack of business community involvement on age wave planning initiatives.

Workforce infrastructure and policies are missing to support older workforce.

Boomers leaving the workforce will require new perspectives/strategies to keep older workers engaged.

The impending nursing & healthcare worker shortage must be addressed.

On the Older Dominion Project...

Public Policy – we're behind, but can learn from others.

The issues we face are not speculative; they are data-driven (fact based).

Virginia needs to catch up to other states.

Broad stakeholders are involved in the ODP – there's eclectic representation here today.

Cultural diversity is lacking in ODP (at least for now).

Sense of urgency – we need to do this now!

How critical the ODP is given lack of healthcare for caregivers... and the ripple effect as presented:

- 9 out of 10 people want to age in place – in their own home.
- 25% of today's households care for or manage the care of a relative.

- The population over age 65 is expected to increase at a rate of 2.3% per year. But the number of family members available to care for them will only increase at a rate of 0.8 percent a year.

(Source: National Family Caregivers Association)

How the business community is connected to aging in society – there is a mutual symbiosis.

Need to make this cause bottom-line driven – to help business thrive and to have business help the communities they call home – to expand reach/capacity/impact of ODP.

Intergenerational perspective is the key. It is not us vs. them – we will all be hit by the age wave ... we're all part of the Older Dominion.

There are many models/viable approaches to examine. (*Note: Florida empowerment models should be added to list*).

Charlottesville offers insight for us – new advocates/community wide involvement. Take a broader perspective to include intergenerational relationships – a human element:

- JABA did not say, “This does not fit our mission”
- Must be flexible to new approaches: JABA – lifelong program in school
- Learning from all demographic groups
- Understanding this is an intergenerational approach – it's the community

The ODP applies to all levels (demographics) and aspects of society (i.e.: sidewalks, ramps, signage, etc.).

The ODP impacts recruitment/retention of residents for our cities and state – impacts economic development.

The ODP should focus on seniors as resources/assets.

This starts with understanding evolving/future intergenerational needs/community needs, not current unmet needs/missing services.

Social agencies need to do better job communicating what they do (*repositioning from older services to more intergenerational community services*).

1st Year ODP Goal: What Would You Like to See from This Planning Effort by the End of the 1st Year?

Shift our lens towards growing older as an opportunity, not something that creates problems.

Identify needs, opportunities, and solutions from the perspective that boomers will be a positive force, not a drain.

Create a vision of *Eschatological Planning* – what that is in 10 years and work our way back.

Create a workable model for us (the ODP) to follow.

Create a framework for local planning.

Find consensus among stakeholders and partners.

Generate a better understanding of the related issues – the challenges of the national trends and issues (*i.e.*, *Social Security*).

Identify information gaps for ODP planning purposes. For example: There are all sorts of informal “under the radar” forms of care being given: at what level is it happening and what support is needed to sustain this? How will this increase over time?

Generate widespread education in the community like we have done today with the ODP leadership team.

This is a very complex set of issues that can't be tackled all at one time. Formulate ODP's scope and prioritization of key issues and opportunities we can thoughtfully address. For example: Prioritize areas such as healthcare impact and planning for age wave.

Involve the public in the ODP planning process.

Educate legislators now about needs – government funding is so slow.

Identify best practices and lessons learned (*i.e.*: JABA in Charlottesville). Create an inventory of best practices we can all access.

Have more business involvement in ODP – get the attention of business community – invite involvement.

Showcase employers' and employees' (residents') needs – both older and younger employees:

- What employment benefits are important now and in the future – where does family care fit in?
- Understand what is important in attracting and retaining
- How does long-term care, flextime, adult daycare fit in?
- Family care benefits/education... expectation of employees and role of employers in addressing related issues
- Appropriateness/comfort of employers addressing these issues

Understand the tradeoffs and cost of additional/different benefits.

Create master evaluation metrics/overall scorecard performance system:

- Design a comprehensive evaluation plan/system.
- Make it comprehensive. For example: Awareness of and access to aging-related services, level of eldercare in the workforce, what people want and value in a community at different ages?
- Include all aspects of living, across all regions of Virginia, and all types of areas: rural, suburban and urban; different living arrangements – home based and retirement communities; the workplace; and daily living services – e.g., grocery stores, etc.

(Note: Some discussion groups called for this master evaluation metrics/scorecard by year 5 – see next section.)

Conduct initial benchmark survey to track performance.

- Identify the key variables and drivers of this cause across all areas of engagement/living.

Make it personal – identify "real" stories to help inspire others.

5 Year ODP Goal: What Would You Like to See FROM This Planning Effort B in 5 Years?

Have a long-term vision in place and accepted of what Virginia should look like.

Create a master model for planning – at local levels and statewide.

Have a concrete plan in place – a strategic plan (roadmap) that stays on the desk, not on a shelf. The plan should include:

- Sustainable and funded plans (i.e., *Practical Tool Kit about Aging*).
- Identified macro issues and their interdependence (i.e., medical schools and healthcare needs).
- Generate specific suggestions/plans (i.e., suggestions on how to make workplaces more age-friendly).
- Acknowledge who is addressing each issue.
- Comprehensive community dashboard to track work and report success on each macro issues.

Have enough information and buy-in to advance our plan.

Identify tangible crisis points, ways to measure them, and ways to deal with them.

Link the ODP initiative to effective land use and transportation planning to sustain the mobility of our aging population.

Include and work with numerous and diverse groups.

Develop more positive view on aging issues.

Make aging population one of the key issues within 5 years – part of our political landscape.

10 Year ODP Goal: What Would You Like to See from This Planning Effort in 10 Years?

Be a laboratory for national initiatives – make Virginia THE model.

Within 10 years, have the issue/cause positioned positively – not just doom and gloom – here's what we can do ... what we are doing.

Have this cause integrated with other related issues/causes.

Have measurable, positive outcomes.

Have an ongoing cost-benefit analysis to reinforce business' ongoing involvement – *their ROI*.

Have all communities involved across Central VA – the entire Commonwealth – have this cause aligned with their local community-based needs.

Have fully engaged ODP community partners in innovative partnerships – have many ODP stakeholders actively working together.

Ensure that all family members have consistent easy access to help – "no wrong door" (NWD). Enhance the awareness and level of connectivity of existing aging services so residents/families know where to go ... widely publicized & trained agency staffs:

- Senior navigator w/ NWD
- One place
- Work across all walks of life ... all \$ levels (& age)
- Not just Internet
- Available still w/ libraries

Understand real dollars/funding needed and identified potential sources (more than government solution).

Make aging a greater part of our culture – attributes that defines us!

Make the community a better place to live for everyone.

Make Virginia THE place to grow up and grow old.

Ride the wave, not be knocked over.

Human Impacts: Issues Related to Human Impacts – How the Age Wave and Individuals Will Affect Each Other:

It's all personal...

Aging is mostly an individual/personal point of engagement – we feel the impact on a personal level.

Advance planning for family aging-related issues is needed – this is not statewide need, but a personal need – for *my family*.

We “get it” when it happens to our family member/calls us into service.

What's needed...

We cannot continue to just warehouse aging population at the last minute.

There's a need to reposition “aging” as a part of life that should be understood and addressed early...eliminate the negative taboo that comes with it:

- We avoid thinking about aging because of the losses we potentially face – ability to drive, care of house, care of self, etc.
- More of a lifespan issue – how can we make "aging" a more comfortable issue to deal with all the time?

Make aging an opportunity – not a burden.

Institutionalized elders – family care decline is an issue that needs to be addressed.

There is a need for more information/better dissemination of exiting information:

- Is there a guide to what I can do in post-retirement? We need some sort of life planning guide.
- We need a “10 Things Couples Don't Talk About” (related to retirement life).

Need to focus on future needs – to anticipate them:

- What is a current community where I am living going to do for me in 10 years? My needs will be different in 10 years compared to now – senior living facilities need a 10-year vision! People who move in when they are 60 will want to be there when they are 80!

Quality of life drivers...

Healthcare issues for "aging" workforce are paramount.

Lifespan + health span go hand in hand. How healthy you are determines the quality of your life.

Personal responsibility is too low – responsibility for own health as health diseases and aging are related...people are not taking enough care of themselves.

- What's the right balance – right level of personal self-care – versus needed level of caregivers and providers for people who should be in better shape?

Consideration of transportation needs should be included – role of mass/public transportation.

Role of education... use brainpower/trainer/knowledge base with older workers role to train one another and younger generations.

Impact on schools of the future – designed for all ages?

Mental health-related issues must be included... we need to learn more about:

- Depression by age(s) - substance abuse.
- Implications of intergenerational roles/union - social engagement.
- Role of communication/changes in communication.

Travel - How do we make this better for our senior needs – keep them active and happy by addressing senior needs.

Spiritual role with healthcare and end of life issues should be considered.

Accessibility of social engagement should be considered.

Access to personal services – identify key service needs to provide needed services for aging population – i.e., home delivery of groceries, businesses-like elder taxi services.

Volunteering – numbers are up, but allocation different – perhaps more social, less "self." What is the "trigger" for Boomers to become active volunteers – responsibility and opportunity – civic engagement drivers?

On Caregivers...

Awareness of what really defines a caregiver is important. Many older adults are caregivers themselves.

Caregiver compensation – tax relief, insurance claims, etc. Can Medicaid be more creative about borrowing best practices? For example: Provide some payment for support of relative as home worker.

Support of caregivers will need to change/evolve to keep them healthy and sound.

Understand the impact on the workplace and traditional definition/classification of full-time worker who is also a caregiver.

Miscellaneous...

Livable communities – ODP should make this appreciation statewide (all across Virginia) – not just urban and suburban areas, but also rural areas too.

Evaluation of planning for urban core vs. suburban sprawl.

How can we enable people to stay at home longer?

Can we really self-fund "retirement?"

Identify trends impacting additional needs/system requirements: poverty levels increasing, single head of households/splintering family structure, distances between family members, etc.

Why is Social Security retirement benefits based on last five years?

The cultural divide must be considered ... how do we bridge this? The impacts of the income divide...generational divide...racial divide.

Economic Impacts: Issues Related to Economic Impacts – How the Age Wave and Our Economy Will Shape One Another:

Overall...

Business community has to be involved in ODP planning.

Age wave-related workforce issues will touch in every sector: healthcare, education, social agencies, etc. Should we prioritize healthcare industry/sector as it will be most acute?

Should we look at those businesses and business sectors that will/can benefit from aging population to help the most with this cause?

Overarching goal is to keep business and the economy growing by contributing to/enhancing our skilled workforce.

Age wave planning must speak in business terms/business language. For example: Non-profits need to approach businesses with something to offer as well as a funding request.

Need unified messages and fact-based arguments to share with partners/funders on importance of and impact of age wave (*and not being prepared for it*). Organize thinking by age wave impact on the community, impact on their workers/business, and impact on community's reputation.

ODP should help foster more age-friendly workplace environments.

Changing nature of work/employer-employee relationship...

What are demos of age & what is the geographic dispersion? What are the expected economic impacts of the age wave? (*This may not be the role of this first survey.*)

Analysis of what our workforce looks like across region/community/state... By age/generation, etc.

- Especially healthcare workforce
- What does/will government workforce look like?
- What part of society will stay in workforce by force?

How does employee caregiving (*active and managing the care*) impact Virginia employers now? Increasing or decreasing?

ODP should help harness/provide insight on age wave-related workforce issues.

Best practices on managing related issues such as institutional knowledge transfer/sharing, re-engaging, workforce re-training, related education, etc.

Boomers leaving at the same time – what should business do to keep older workers? How can experts on aging/aging services industry be constructive partners with business community in this area?

- Need opportunities that are more flexible for "workers" – what's optimal?
- How do employees see family leave programs today? What's driving their assessment – is it flexibility?
- What programs will help keep people working?
- Impact of health insurance premium – flexibility for employees to develop customized coverage/program

Resource competition – intergenerational – how do younger workers view all of this? Good policy for older workers should attract younger workers? Will it?

Changing nature of home care and its impact on business:

- Role/impact related with assisted living – ability to care for family member in their home
- Moving patients to LTC facilities is breaking budget. Also increase cost of medicine
- Have rental property/affordable housing near senior housing

Help provide free content for workplace delivered employee "look ahead" information and education – to help employers educate their employees about future trends and how to manage them/plan for them – see "*Weyerhaeuser Model*."

ODP deliverable could eventually include *Aging Issues Summit* as part of ODP (*among major businesses in the Commonwealth*) – workplace issues among aging population, productivity, family care, flexibility, recruiting older employees.

Economic opportunities...

There will be tremendous business opportunities to provide services that aging population will need.

Tremendous opportunities in helping people start a business – re-careering training and business start-up programs and support.

What services will be needed ... to help this population with things like small business loans, starting a new career ... etc?

Can/should entrepreneurial efforts be directed to business startups that help meet the anticipated needs related to this overall age wave cause? Who provides this?

Is it an economic benefit for a community to attract aging population?

Example: Northern Neck – middle to high income.

Opportunities exist across a lifespan. Government and military retire earlier than most groups. The government and military have big presence in Virginia. Should they be included in ODP?

- How do we match opportunities of retired government /military with skills/wants of business community?

Development of workforce pool of capable “retirees” who still want to work – private service, shared corporate coop resource, association-related service. Who provides this?

Funding issues/role of players...

Role of pension/401K/etc. in family planning versus workforce role vs. impact on community – Social Security’s (SS) role/length to stay? Will SS be here?

Impact of increased benefits as workforce shrinks . . . as tax base changes. We can’t put this on business – age wave will impact all – all need to fund.

How to fund needed ramp up in social programs – businesses will be spending more on benefits ... might not be able to fund. Government maxed. Current formula doesn’t work.

Need new perspectives/solutions from planning process.

Role of players ... what do players assume their role is? Who is leading? Who should be? Who is looking at long term strategic plan with nursing homes?

Societal Impacts: Issues Related to Societal Impacts – How the Age Wave and Our Society Will Shape One Another:

How society views aging...

Overall population needs to appreciate aging issues. We are all aging. We all need to understand demographic diversity and demographic pressures.

We need to generate greater comfort level with aging/talking about aging.

Use the JABA (Charlottesville model) when planning with ODP – that is, use a broader look at all generations, and look for commonalities between generations.

Youth-oriented culture says older folks are a drain/negative. We need to truly understand the public's perception and what drives it.

Elders need to remain engaged in our community to make it complete.

Aging needs to be discussed in schools – will help younger generations understand life issues.

Contribution of aging population...

We must find ways to harness aging population's societal value/contribution. This potential needs to be unlocked through education, training over our *lifespan*.

Retirement/aging population does not equate to being ineffective. Need to look at aging population differently:

- Identify economic issues for aging population
- Identify needs on feeling productive – full time/part-time?
- Identify ways to plug in – i.e., schools mentor/experts
- They need volunteer vs. paid opportunities.

There is a natural role for elders as older mentors.

We need to change society's "language" (diction) regarding aging – potential volunteers and beneficiaries don't want to be thought of as "seniors/feeble."

Potential steps to take...

Identify multiple points of self-interest.

Funding for aging issues should also be viewed from intergenerational lens.

Knowledge of internet/computers, etc. can change perceptions on aging.
Exploring role of technology is important.

Technology may serve as intergenerational facilitator as boomers are
“technologically plugged in” (unlike previous generation).

ODP must address new lifelong learning – cyclical working and retirement ahead.

Transportation and urban planning needs, changing legal and financial needs,
long-term care needs, should not be viewed as silo issues, all are inter-related.

What Should Be Included in ODP? / What's Missing in ODP?

Today / Misc. Ideas for the ODP:

The notes in this section represent miscellaneous comments offered by group participants during the table breakout sessions. These comments were not listed /offered under the topic areas provided. Most of these comments were expressed as suggestions on what the ODP should address or include as part of its overall scope.

Suggested ODP tasks/considerations:

Ultimately, include communications outreach to get word out to all ages –
“Boomer aging” won't be all negative but different from their parents.

Identify what the public needs to do to start training/educating younger generations about saving, retirement planning, and value of seniors, etc. Who does this task? Who should do this task?

Integrate the services we have now.

Help organize, promote, and provide easier access to information related to this cause – age wave planning for Virginia.

Provide better understanding of what will happen as we age... (by gender).

Inform senior community planners – have them ask themselves: “*Would I want to live and work here?*” and plan from this perspective.

Explore innovative partnerships with AARP & Genworth for innovative solutions – i.e., group underwriting on a *mass* scale.

Examine “best workplace award programs” for working mothers and workplace diversity – take lessons from these models for elder care – our age wave planning.

Create an *Older Dominion Project Award* to recognize best practices in the workplace:

- Businesses that value the aging population as workers
- Create something similar to a "Top 10 Workplaces for Mothers" award

Include local area surveying (*at the community level*) – there is a need for good data on the local community level. Can we create a template to understand and deliver on each area’s need?

(Note: The initial ODP research budget as funded by Richmond Memorial Health Foundation does not afford community by community surveying – details on the research approach will be shared with ODP Study Partners/ Technical Advisors).

Provide more emotional based surveying /behavioral modeling and attitude input, not just an assessment of today’s service needs.

Include perspectives of working grandparents (*taking care of grandchildren*) in ODP planning. Most workplaces don't take grandparents and grandchildren into consideration.

Bring in diverse culture as part of ODP membership makeup – to discuss aging issues! We need to immediately recruit more diversity to the ODP.

(Note: This comment was offered by several participants)

Concern about the care emergency/providers, nursing professional – shouldn’t they be at the ODP planning table too?

Identify funding trade-offs that must be addressed – understand where the business community and residents are in making these tradeoffs and why.

Make the aging population more "attractive" to medical students/doctors – HCS RF – maybe through Medicaid. Right now in Virginia, 12 % of the budget is used for Medicaid, 20 % is budgeted for South Carolina.

Dramatically re-imagine Virginia's current infrastructure/support systems for an aging population. For example: We can see the age wave will impact housing – we need more elder-friendly construction in place. Thus ensure today's building codes require new home construction to have easily converted "age friendly" amenities for tomorrow's residents (wider hallways, handrails, ramps, etc.). How do we do this across all of our society?

Examine ways to purchase long-term care as a group or even as a community rather than as an individual!

Understand resource-based allocation scale – reimbursement policy for Medicare.

Recruit new people to health care/personal care work.

Identify what is similar/different in communities across Virginia.

Find ways to keep the momentum going well after today. Have regular ODP meetings to drive and measure our progress.

Find a short-term victory – start with small changes then work towards big changes/improvements.