



Secondary Research Report: Assessment of City, Regional, & State-level Age Wave Preparedness Efforts across the Country

Draft #4: February 2008

Background:

An important step in the *Older Dominion Project* is to analyze existing research on aging preparedness - from a city, regional, state-wide, and national perspective.

The goal is to identify state-of-the-art practices being employed, and measurements being utilized, by cities and states to assess their relative state of preparation for the coming age wave (i.e., awareness of issues, measurement practices, partnerships, and specific long-term plans). “*Lessons learned*” from a review of publicly available studies and related plans will help guide the Older Dominion Project in formulating the optimal approach to the state-wide primary research study - research objectives, audiences, methodology, topics, etc.

This first draft of the Secondary Research Report: *Assessment of City, Regional & State-level Age Wave Preparedness Efforts Across the Country* will be shared with Older Dominion Project Study Partners and Study Technical Advisors. We will ask for their informed feedback and suggestions on including any additional materials.

A final draft of this report will be prepared based on Project Study Partners’ and Study Technical Advisors’ input and suggestions. This may include the identification of additional studies and other relevant source materials that have not been uncovered to date. Implications from any new material will be included as well.

Important insights from the final version of this *Secondary Research Report: Assessment of City, Regional & State-wide Age Wave Preparedness Efforts Across the Country* will be incorporated into the overall Older Dominion Project final report.

Secondary Research Review Approach:

The process SIR/Boomer Project followed in assessing city and state age wave preparedness studies across the country is detailed here:

1. The process started with a review of SIR/Boomer Project's in-house library of studies that have been conducted by SIR/Boomer Project and other publicly available studies that SIR/Boomer Project has collected over the past three years.
2. SIR/Boomer Project consulted with Dr. Richard Lindsay and Gordon Walker to identify potential sources of age wave preparedness material and known studies related to age wave planning.
3. SIR/Boomer Project conducted a comprehensive Internet search of all public sector sources - academia, government (federal, state and local), and non-profit age waving planning initiatives. Private sector studies on aging issues related to health, retirement, transportation, etc. were also collected.
4. SIR/Boomer Project reviewed the official Web sites of 49 state-level Departments for Aging related to plans and age wave preparedness studies/initiatives.
5. SIR/Boomer Project downloaded and inventoried all relevant reports, plans, papers, and articles. This database is housed at SIR and is available for all Study Partners and Study Technical Advisors to review. An inventory of all relevant material collected to date is presented in the Appendix of this document.
6. SIR/Boomer Project synthesized the information and arrived at a series of implications for this overall project - the Older Dominion Project. This information is presented in this draft report - *Secondary Research Report: Assessment of City, Regional, & State-Level Age Wave Preparedness Efforts Across the Country*.
7. This draft report will be shared with Study Technical Advisors and Study Partners for their informed input. SIR/Boomer Project will follow-up and investigate any additional sources of information suggested and add the appropriate information to the database. A final report will be prepared and circulated.

Key “Lessons Learned” & Related Implications for Metro Richmond & the Commonwealth of Virginia Age Wave Planning:

Based on an in-depth review of more than 100 plans, studies, reports collected in this process, the key take-a-ways and related implications for the *Older Dominion Project* include:

1. **Virginia is behind other states in preparing a “long-term community-based” strategic plan to address the age wave.**

The plans advanced by the Virginia Department for the Aging and the Commonwealth Council on Aging are thorough and outline specific recommendations. However, these plans, by necessity, focus on the immediate

age-related service needs (and unmet needs) and ways the service delivery infrastructure (existing aging services network) can better address service provision. While the shifting demographics are referenced in these plans, neither of these officially sanctioned plans outline Virginia's long-term state of age wave preparedness - *a 20-year planning perspective for the coming age wave*.

While the Joint Legislative Audit and Review Commission report does take a longer-term planning perspective; it is 100% government agency centric - assessing the age wave's impact on Virginia state agencies from the perspective of each agency.

The best local (Virginia-based) age wave planning is being done in the Charlottesville region through the Community 2020 Plan. Lead by the Jefferson Area Board for Aging and other locally based aging services organizations, this community-based plan marshals the planning perspectives and resources of over 85 organizations and hundreds of individuals.

Strategic Implication: There is no reason the Commonwealth should be without a comprehensive and practical long-term and community-based action plan on how Virginia should ride the age wave. With Charlottesville setting an outstanding in-state example, the Older Dominion Project should serve as a vital catalyst in starting a state-wide conversation on long-term age wave planning.

2. Across the country, business stakeholders are not part of the age wave community planning process:

Most age wave planning has been orchestrated by the local or state agency responsible for senior services. Some of the more innovative plans such as Burlington, Charlottesville, and Boston have included hundreds of citizens as civic players (5 to 75 organizations) in aging services industry and healthcare organizations and institutions (hospitals, third-party payers, etc.). No major age wave planning effort to date (at least not from our initial secondary research scan), however, has involved the business community. Leading corporate players that are headquartered in the city or state are not referenced in the plans or reports. As an example, in Boston, only three of the initial 75 organizations were businesses. The same is true for Charlottesville's 2020 Plan.

Why hasn't the business community been seated at the table? According to the Aging Texas Well Study, the Texas business community loses up to \$29 billion every year as 75% of the family elder caregivers try balancing eldercare and full time work.

***Strategic Implication:** The Older Dominion Project should continue efforts to involve the business community early on in the planning of the overall project, as well as keep them engaged throughout the implementation stage.*

Once again, we have an opportunity to differentiate Virginia and reinforce why the Commonwealth is the best managed state in the country - “Virginians are always looking ahead and managing their future.”

Discussion on the overall study audiences and objectives should reinforce the importance of business-centric perspective - what the issues are and how to address them. To this end, the Study Implementation Team will explore ways to survey business leaders across the Commonwealth in addition to residents (employees). (Note: the original project scope called for just surveying residents.)

Key business-centric age wave planning issues may include:

- (1) Family leave issues to care for elderly population;*
- (2) Productivity of an aging work force, especially based on caregiver stress;*
- (3) Labor shortages (will most job openings occur as the result of retiring, not because of new job creation?);*
- (4) Training and education mismatches with skill needs (focus will shift to re-training of individuals already in the work force);*
- (5) Technology (technology will have to substitute for workers due to labor shortages but can't provide care for the elderly, where there is already a shortage); and*
- (6) Healthcare and long-term care implications?*

3. **Many age wave planning initiatives include an array of community health indicators and these indicators are fed by multiple data sources:**

The tendency of many age wave planning initiatives is to create 7 to 10 major “community indicators of readiness” from which to assess progress over time. The data for these indicators comes from multiple sources on older adults (reports, authorities, studies, etc.).

For example, *The Boston Partnership for Older Adults* first report brought together over 40 data sets and thousands of pages of information. Seven major studies are referred repeatedly throughout the report. In Richmond, the Data Share Richmond Pilot Project (Report to United Way Services, May 2004: Assessing the Needs of Older Adults in the Greater Richmond Area: A Summary of Findings and Recommended Indicators) does a nice job in recommending several key indicators of community health as it relates to seniors.

Looking across multiple initiatives, there is no one set list of indicators. But while indicators cover a wide range of issues (such as housing and homelessness, mental health, long term care, home and community safety, opportunities for connections, diversity and cultural competency, transportation, etc.), most planning efforts give more weight to health and healthcare-related indicators.

Strategic Implication: The Older Dominion Project was initially conceived as benchmark assessment of Virginia's age wave preparedness from resident's perspectives - attitudes and opinions. As part of the resident survey process (assuming a 15 minute survey), self-reported behavioral information will be captured across some of the key areas that can be considered key indicators (for example, statistically-projectable information on the state of caregivers and care-receivers - % who care for an elder family member and work, % of elderly who use own car or public transportation, % who can't leave the house, etc.). Under the guidance of Study Technical Advisors, this information will be organized under 8 to 10 major indicators of preparedness.

It should be noted that this survey-generated self-reported information will not generate the level of data to feed hundreds of performance "indicators."

The Study Implementation Team has approved this initial approach. The Richmond Memorial Health Foundation funding should not go beyond an assessment of attitudes, opinions, and limited self-reported behavioral data regarding age wave preparedness.

A more comprehensive gathering of all relevant data and statistics on where Virginia stands across many age preparedness indicators may be part of future phases of the Older Dominion Project. This could include collecting third-party information from the U.S. Census, Virginia Employment Commission, Virginia Department of Health & Human Services, etc.

4. **Age wave planning recommendations usually boil down to a seemingly manageable list of specific action steps. But, few say who is responsible and most of those point back to the government.**

The good news is that most age wave plans effectively advance action steps and recommended objectives and strategies. Some plans even have very detailed and specific recommendations across categories like transportation, housing, and health (see South Carolina and Texas as examples). Most do not point to who is responsible for implementation. Florida's plan is an exception as it identifies the group or organization responsible for implementing the recommendation.

Only the short-term plans, in just a few states, offer cost details. More typically, age wave plans present recommendations and suggest greater funding is needed. Universally, the plans focus on governmental agencies as the parties most responsible for dedicating more funding to this cause.

Strategic Implication: The Older Dominion Project initiative should be clear from the start that this it is a unique public-private planning partnership where a long-term plan and, ultimately, any recommended implementation steps will be a "shared responsibility" among all stakeholders - not just government agencies.

5. **Most age wave planning initiatives have been short-term in focus. Few have created "legacy organizations" that make age wave planning ongoing.**

For the most part, age wave planning initiatives seem to be special one-to-two year task force-oriented projects that culminate with the production of a final report. Yet, a few efforts have turned into ongoing sustained programs. The best examples include the work being done in Boston and in the Charlottesville region.

The Boston Partnership for Older Adults' initial planning process involved 75 organizations. Now there are 200. The 2020 Plan guiding the Charlottesville area is another example of an organic process. The 2020 Plan recently conducted an assessment of progress to date. This included surveying 1,200 residents, holding a community forum, and conducting media outreach. Awareness, support, membership, and active participation in the 2020 Plan appear to be growing. Moreover, 75% of the Charlottesville area residents now feel it is important for the region to continue its planning efforts to make the region a national model on how a community can be the best place for people of all ages.

Strategic Implication: When the Older Dominion Project Partners and Technical Advisors review and discuss the research findings, the resulting consensus on the recommendations should also consider the need to create a sustaining effort or organizational structure like the Boston Partnership for Older Adults or the 2020 Plan.

6. Most planning initiatives have names that are all about “Aging” - as if it were a temporary condition, not a fact of life. The most promising programs have memorable names and graphic identities that position the cause in a favorable manner.

“Meeting Greater Elder Needs with Fewer Resources in South Carolina” and “Strengths and Needs Assessment of Older Adults in the Denver Metro Area” are, at best, unimaginative and, at worst, bring up negative connotations with aging - *it’s for one group, not the greater good of society and it will cost big bucks.*

Few names paint the picture or offer a plan that positions Boomers growing older as a particularly good thing for these communities. Some names like “Texas Aging Well” or “The Burlington Vermont Livable Community Project” or New York’s “Project 2015” are much more appealing and help to position the cause in a positive light. Graphics help, too:



Strategic Implication: Based on this observation, the Study Implementation Team has approved “The Older Dominion Project” as a working name for this initiative. This overall project name will be supported by a descriptor tagline - *An Initiative by Business, Government, and Non-profits to Help Virginia Ride the Age Wave.*

The Older Dominion Project

*An Initiative by Business, Government, and Non-profits
to Help Virginia Ride the Age Wave*

Most Helpful Resources Identified & Reviewed to Date:

After reviewing more than 100 plans, studies, reports, and articles identified in the secondary research review process, several sources potentially offered the most insight and guidance for the *Older Dominion Project*.

These sources are detailed here.

(Note: Much of the descriptive narrative as listed below was copied from the sponsoring organizations' Web site.)

❖ **Virginia's state level aging services plans/age wave planning:**

The Virginia Department for the Aging (VDA): VDA, the Commonwealth's agency responsible for planning, coordinating, funding and evaluating programs for older Virginians, periodically develops a State Plan for Aging Services. This Plan is required by the federal Older Americans Act of 1965 (as amended), and its purpose is to help structure the Department's provision of services to older Virginians.

This Plan is submitted to the federal Administration on Aging as Virginia's application to receive federal funds under the Older Americans Act and includes assurances that federal funds will be administered in accordance with current laws. The Plan covers a four-year period. The VDA has prepared the State Plan for Aging Services 2007-2011 for submission to the federal Administration on Aging. This Plan should result in Virginia receiving \$97,000,000 in federal funding over the next four years. The Plan development process included a series of "Community Conversations on Aging" across the Commonwealth to solicit input from older Virginians and their families.

A copy of the 2003-2007 Plan: [Virginia State Plan for Aging Services](#)

Commonwealth Council on Aging: The Commonwealth Council on Aging is composed of citizens from all walks of life and all geographic areas of the Commonwealth. The Council promotes an efficient, coordinated approach by state government to meeting the needs of older Virginians. The Council has 19 appointed members and four ex-officio members. The Governor appoints 11 members, one from each of Virginia's congressional districts. Of the remaining eight at-large members, four are appointed by the Speaker of the House of Delegates and four by the Senate Committee on Privileges and Elections. The Council on Aging presents recommendations to the Governor and General

Assembly. The 2006 recommendation includes requests to more adequately fund the Commonwealth's aging services infrastructure.

[Commonwealth Council on Aging's Recommendations to the Governor and 2006 General Assembly](#) 8.5" x 11", 2 pages, 39.3 KB.

Joint Legislative Audit and Review Commission (JLARC): The most comprehensive Virginia state-level age wave planning effort has come from efforts related to House Joint Resolution 103 (2004) that directed Virginia's Joint Legislative Audit and Review Commission (JLARC) to study the "impact of Virginia's aging population on the demand for and cost of state agency services, policies, and program management." This effort focused entirely on State agencies and local counterparts. Impacts were defined as the ability of agencies to provide funding or services to meet demand by eligible older Virginians. Based upon existing type and availability of services, and existing eligibility criteria, and the current level of unmet demands, this report suggests that many agencies are not well positioned to meet the potential increase in demand.

❖ **Virginia regional level aging services plans/age wave planning:**

2020: Plan Aging in the Community represents the most organized and forward-looking planning effort by one of Virginia's local communities. Five years ago, more than 85 organizations and 500 individuals in the Thomas Jefferson Planning District set their sights on making the Charlottesville region a national model on integrating all generations into a community that is a great place to live at any age. This effort started with a long-term, community-based plan: The 2020 Plan. This work has been recognized by the "Livable Communities for All Ages Award" in 2005.

<http://www.jabacares.org/files/docs/2020%20plan/fullplanforemail.pdf>

❖ **AARP's "Livable Communities":**

AARP's "Beyond 50.05 - A Report to the Nation on Livable Communities: Creating Environments for Successful Aging" presents a new agenda for examining, building and retrofitting our communities to support successful aging. [Beyond 50.05 Full Report](#) (PDF, 108 pages).

As a companion to the "Beyond 50.05 Report," the AARP Public Policy Institute developed an evaluation guide to help residents, advocates, and local leaders identify areas of success and potential opportunities for improvement in their community: [Livable Communities: An Evaluation Guide](#). This guide, written from the perspective of persons age 50 and older, helps residents identify

areas where they can direct their energies toward making their community more livable for themselves and for others.

❖ **MetLife Foundation, n4a, and Others: “The Maturing of America: Getting Communities on Track for an Aging Population”:**

To help cities and counties better meet the needs of an aging population, and to leverage the experience and talent of older Americans, five national organizations have joined forces to assess the "aging readiness" of America's communities and to identify solutions.

Known as *The Maturing of America - Getting Communities on Track for an Aging Population*, the project is being led by the National Association of Area Agencies on Aging (n4a), in partnership with the International City/County Management Association, National Association of Counties, National League of Cities, and Partners for Livable Communities.

The initiative is being funded by a grant from MetLife Foundation. In the project's first phase, a survey was distributed to 10,000 local governments to assess the "aging readiness" of individual areas. The survey found that half (46%) have begun planning to address the long-term needs of an aging population.

[Download the Maturing of America Report > \(2.80 MB\)](#)

❖ **Minnesota’s “Project 2030”:**

Project 2030 was a two-year Minnesota Department of Human Services/ Minnesota Department for the Aging initiative to identify the impacts of the baby boomer generation that begins turning 85 in 2030 and to prepare a state response to the changes that will accompany the aging of Minnesota's population.

Project 2030 Report presents basic state-wide demographic facts and figures about the changes that will occur in the older population in Minnesota over the next 30 years, describes characteristics of Minnesota's future elderly, and provides supporting data and research. Included are demographic realities faced between now and 2030.

Most of the report focuses on identifying and discussing these four major themes for the state's preparation for 2030: helping boomers prepare for retirement, health and long-term care, changing communities, and work force vitality. The discussion of each theme includes the importance of the theme, aging implications for existing and future trends, vision for 2030, policy directions, and 2030 milestones. The final report incorporates material from community forums, surveys, roundtables, and staff research and analysis.

http://aipi.n4a.org/pdf/BPrac_Project2030.pdf

❖ **“Aging Texas Well”:**

Texas has more than 2.7 million residents over the age of 60; within 25 years, there will be an estimated 7.4 million Texans over the age of 60. To plan for the aging of Texas, Governor Rick Perry issued an executive order creating the Aging Texas Well Advisory Committee and Action Plan. The order, issued in April 2005, formalized the Initiative and asked the department to continue its work to identify and discuss aging policy issues, guide state government readiness, and promote increased community preparedness for an aging Texas population.

Qualitative and quantitative assessment forms the foundation for the Aging Texas Well Initiative. Research has focused on the quantitative assessment of the well-being of older Texans. The Initiative objectively measures indicators of successful aging. The gerontology literature on “successful aging” helped define a model for analysis of key indicators of how well Texans are aging. Using these indicators as a framework, a telephone survey was developed to measure how well older Texans are aging. The purpose of the survey is to provide insight into how well older Texans are doing (based on their own self-report) on key indicators of successful aging across the Aging Texas Well areas of focus.

Aging Texas Well Initiative is one of the most comprehensive state-wide age wave planning initiatives, funded by state government.

[Aging Texas Well Initiative](#)

❖ **“The Burlington Vermont Livable Community Project”:**

The Burlington Livable Community Project is led by AARP Vermont in cooperation with the city and a group of some 30 community stakeholder organizations. The multi-year effort aims to provide direction, assess needs and resources, and develop recommendations in the areas of housing, transportation and mobility and community engagement.

A comprehensive telephone survey of 800 city residents over age 45, as well as a series of seven focus groups with residents over 50, highlight much of what is attractive about Burlington while revealing several gaps in the areas of mobility, housing and community engagement. Many common themes emerge from this research that now informs policymakers, planners, community groups and the public to help Burlington adjust to a growing older population.

[http://www.snellingcenter.org/filemanager/
file_download/phpY5B4Oh/BLCP_report.pdf](http://www.snellingcenter.org/filemanager/file_download/phpY5B4Oh/BLCP_report.pdf)

❖ **“The Boston Partnership for Older Adults”:**

The Boston Partnership for Older Adults (<http://www.bostonolderadults.org/>) is a coalition of more than 200 organizations and individuals working to ensure that all older adults have the support and resources needed to age with dignity.

Through education, improved access to information and services, as well as increased collaboration among Boston’s aging service providers and funders, this organization is striving to build a system for older adults and their care partners that values independence and choice.

The Boston Partnership for Older Adults is supported by the Robert Wood Johnson Foundation through its Community Partnerships for Older Adults (CPFOA) national initiative. CPFOA seeks to foster community partnerships that are improving the long-term care and supportive service systems to meet the current and future needs of older adults. The two key reports from the Boston Partnership for Older Adults are:

[100,000 Voices on Growing Older in Boston](#), published in 2003, analyzed over 50 data sources including interviews with many of Boston's older adults. Cited as "the most in-depth and thoughtful" study of residents over the age of 55 in Boston, the report paints a picture of the joys and challenges of aging in our community and is to be used as a guide to better understand the experiences of Boston's aging population.

[Boston's Vision for Aging with Dignity](#) report outlines a strategic plan to improve the lives of older adults and their care partners in Boston. The key components of a comprehensive system of support for older adults are presented as well as a plan for making Boston a model for the nation in the care and support it provides to its older residents.

❖ **New York’s “Project 2015”:**

In February 2002, Governor Pataki convened 36 state agencies to consider how New York State's changing demographics, particularly the aging of the baby boomer cohort, will affect state government in the future. Pataki asked state agencies to take time in 2002 to identify policy areas that will be affected and define the top priorities that each will pursue in the next five to seven years “to prepare our State for this demographic shift.” The state agency briefs were compiled in [Project 2015: State Agencies Prepare for the Impact of an Aging](#)

[New York - White Paper for Discussion](#) and presented to the Governor by the 36 state agencies that participated in its development.

A list of the participating agencies in the state agency workgroup and all Project 2015 materials may be viewed on the New York State Office for the Aging's Web site: <http://www.aging.state.ny.us>.

❖ **South Carolina's "Summit on Aging":**

While not focused on long-term age wave planning exclusively, South Carolina holds day-long annual summits to provide an opportunity for stakeholder organizations involved in providing senior services in South Carolina to hear directly from policymakers about recent changes in federal and state legislation on health and long term care.

The first South Carolina Summit on Aging was held in November 2004. Many policy recommendations surfaced from these proceedings as detailed in the event's White Paper.

[Click to download a copy of the Summit on Aging White Paper](#)

❖ **World Health Organization (WHO) Global Age-friendly Cities Project:**

On International Day of Older Persons (10/01/07), the WHO released an innovative guide for cities to utilize as they engage in comprehensive planning efforts around the needs of elders. The guide was created with the active participation of older people who decided of what an age-friendly city actually consists. This user-friendly guide incorporates older people's concerns as well as those of caregivers and service providers and contains a checklist for cities to use to self-assess and track progress.

WHO continues to lead multiple partners in the support and guidance of the development of age-friendly cities.

[Click to download a copy of Global Age-friendly Cities: A Guide](#)

❖ **Elder Friendly Communities Program (Calgary, Canada)**

This project's goal is support seniors in connecting with one another, contributing to their neighborhoods, and leading initiatives to improve their communities. The City of Calgary, University of Calgary, and other service agencies in the area have created research reports on community development and service coordination to improve elder quality of life.

[Click to go to the Elder Friendly Communities Program Web site](#)

❖ **Communities for a Lifetime (Florida)**

The State of Florida’s Department of Elder Affairs created this program to help communities become better places to live using a continuous process of self-assessment and improvement. In order to participate, communities have to reallocate existing funds. Currently 100 Florida communities are participating and receive state-developed technical assistance materials

[Click to go to the Department of Elder Affairs Web site](#)

❖ **AdvantAge Initiative (New York)**

According to its Web site, “The AdvantAge Initiative is a community-building effort focused on creating vibrant and elder-friendly, or ‘AdvantAged,’ communities that are prepared to meet the needs and nurture the aspirations of older adults.” The Center for Home Care Policy and Research, and the Visiting Nurse Service of New York took a comprehensive survey of community-residing older adults to help local groups build broader awareness about aging, inform service and other planning efforts, and spur needed community-wide action in the not-for-profit, public, and private sectors.

[Click to go to the AdvantAge Initiative Program Web site](#)

Summary:

Based on the initial review to date of age wave planning efforts, the major take-aways include:

- 1) Other cities and states may be ahead of Virginia;
- 2) Many of the age wave planning initiatives are short-term with few sustained programs;
- 3) Most planning initiatives are orchestrated by and with the usual suspects - the existing aging services agencies and organizations. If third-parties are involved, they are usually health and healthcare-related players. The business community is not at the planning table;
- 4) Most long-term age wave planning includes community stakeholder input and involvement through focus groups listening sessions and surveys. They also include measurement across a range of “community health indicators”; and

- 5) Most final age wave planning reports outline specific action steps, but suggest who should be responsible for implementation or funding other than the government.

The Greater Richmond region and the entire Commonwealth of Virginia have an opportunity to create an innovative planning process that is truly unique in purpose, scope, and stakeholder involvement.

This document is a step in that direction. It involves an initial review of age wave planning practices across the country. It is not meant to be an exhaustive review, but rather a broad scan of how cities and states have conducted age wave planning reports.

The next immediate step is to gain feedback and suggestions on this draft report from Virginia's most informed aging experts, aging-related service organizations, and academic institutions across the Commonwealth. SIR/ Boomer Project will collect this input and include suggestions and additional information in the final draft of this report - *The Older Dominion Project Secondary Research Report*.

Appendix – Listing of All Relevant Sources:

The following plans, studies, and reports were collected and inventoried as part of this process. They will be stored on an electronic database as a part of this process.

Age Wave Preparedness Research Database

*Database of Studies, White Papers, Plans, and Articles
on Age Wave Planning & Related Topics*

As of September 20, 2007

1. **Age Wave Preparedness Studies, Plans, & Reports Related to Long-term Planning - National Level Perspective**
 - a. AARP State of 50+ in America, AARP by Southeastern Institute of Research
 - b. Met Life Foundation: The Maturing of America - Getting Communities on Track for an Aging Population (32 pages)
 - c. Harvard School of Public Health: Booms, Busts & Echoes: How the Biggest Upheaval in History Is Affecting Global Development 2006 (6 pages)

- d. NIA: Why Population Matters: A Global Perspective 2006-2030 (32 pages)
 - e. NIA/US Dept of Health: The Health & Retirement Study: Growing Older in America 2006 (108 pages)
 - f. The Brookings Institute: Mapping the Growth of Older America: Seniors & Boomers in the Early 21st Century (28 pages)
 - g. Federal Interagency Forum on Aging Related Statistics: Older Americans Update 2006 (69 pages)
 - h. CDC/Merck Foundation: The State of Aging & Health in American 2007 (37 pages)
 - i. A Toolkit: Funding Across the Ages - Grantmakers in Aging (40 pages)
 - j. HCFO: Meeting the Future Long-Term Needs of Baby Boomers 2007 (51 pages)
 - k. AARP - Beyond 50.05: A Report on the Nations Livable Communities
 - l. Office of Population Research, Princeton University, Department of Population Health Sciences, University of Wisconsin-Madison: Variation in Living Environments Among Community-Dwelling Elders 2004 - 2030 (34 pages)
 - m. University of Michigan: Health & Retirement Study 2006 (35 pages)
 - n. American Hospital Association: When I'm 64 - How Boomers Will Change Healthcare (24 pages)
 - o. AARP - Livable Communities: An Evaluation Guide 2005
- 2. Age Wave Preparedness Studies, Plans, & Reports Related to Long-term Planning - State Level Perspective**
- a. Maryland Aging Transition Workgroup Report: Executive Summary - "The Baby Boomers are Coming" 2007 (40 pages)
 - b. Virginia Joint Legislative Audit and Review Commission - State Agency Preparedness for Aging

- c. Montgomery County, PA - Boomer ANG Project: Boomers - Aging's Next Generation Summary Report 2005 (7 pages)
- d. South Carolina Summit on Aging White Paper 2005 (53 pages)
- e. Planning for an Aging California Population: Preparing for the "Aging Baby Boomers" 2004 (14 pages)
- f. The Ecumen "Minnesota Age Wave" Study 2007 (11 pages), Topline Report Results (22 pages)
- g. Aging Initiative 2030 Project: Preparing for the Boom in Minnesota 1997 (4 parts)
- h. The Aging of Minnesota's Population Study 2002 (22 pages), Timeline to Retirement (12 pages), Baby Boomer Market Research Report (13 pages)
- i. The State of Aging in Florida: A Monograph & Needs Assessment 2004 (40 pages)
- j. Strategies to Improve Health Care in Virginia: Survey of Residents 50+ Study 2007 (42 pages)
- k. Alabama 2007 - 2010 State Plan on Aging (156 pages)
- l. Alaska 2008 - 2011 State Plan on Aging (103 pages)
- m. Arizona 2008 - 2010 State Plan on Aging (70 pages)
- n. Florida 2007 - 2009 State Plan on Aging (209 pages)
- o. New York - Project 2015: Preparing for Demographic Change 2005 (28 pages)
- p. Virginia 2007 - 2011 State Plan on Aging (110 pages)
- q. New Jersey 2030 - Mobility of Aging & Disabled Populations
- r. Washington 2006 - 2010 State Plan on Aging (179 pages)

**SIR has visited the Department for the Aging or related state-level office for all 50 states. Other studies much like the above are available for review upon request.*

3. Age Wave Preparedness Studies - Plans, & Reports Related to Long-term Planning - City/Regional Level Perspective

- a. Data Share Richmond Pilot Project, Report to United Way Services, May 2004: Assessing the Needs of Older Adults in the Greater Richmond Area: A Summary of Findings and Recommended Indicators
 - b. JABA 2020 Community Plan on Aging: Making Our Community a Great Place to Age 2003 (97 pages)
 - c. 2007 JABA - Making Charlottesville a National Model on Aging Study - Southeastern Institute of Research/Boomer Project (100 pages)
 - d. Denver: Strengths & Needs Assessment of Older Adults in the Denver Metro Area 2004 (396 pages)
 - e. Boston: 100,000 Voices on Growing Older in Boston: Understanding the Experiences and Needs of Boston's Older Adults 2003 (60 pages)
 - f. Kansas City: Community Preparedness for Aging 2006 (12 pages)
 - g. A Great City for Older Adults: An Action Plan for Burlington, VT (25 pages)
- 4. Baby Boomer Studies & Reports - Demographics/Trends**
- a. MetLife - American Boomer Profile 2007 (4 pages)
 - b. MetLife - American 65+ Profile 2000 (4 pages)
 - c. MetLife - Pre-Retiree Profile 2005 (4 pages)
 - d. MetLife -The Media Reality Check Study 2004 (28 pages)
- 5. Baby Boomer Studies & Reports - Healthcare/Caregiving/LTC**
- a. MetLife - Caregiver Cost Study: Productivity Losses to US Business 2006 (20 pages)
 - b. MetLife - Different Gender Differences: Do Women & Men View LTC Differently? 2004 (25 pages)
 - c. MetLife Long-Distance Caregiving Study 2004 (16 pages)
 - d. MetLife - Market Survey of Nursing Home & Home Care Costs 2006 (20 pages)

- e. MetLife - Juggling Act Study: Balancing Caregiving with Work & Costs Involved 1999 (16 pages)
- f. AARP - Paying for Quality Care: State & Local Strategies for Improving Wages & Benefits for Personal Care Assistants 2006 (47 pages)
- g. AARP - Access to Physicians Survey 2007 (28 pages)
- h. AARP - Beyond 50: The Nations Trends in Health Security 2002 (124 pages)
- i. AARP - Strategies to Improve Health Care in Virginia: Survey of Residents 50+ Study 2007 (42 pages)
- j. AARP - Bridging the Gaps: State & Local Strategies for Ensuring Backup Personal Care Services

6. Baby Boomer Studies & Reports - Retirement

- a. The MetLife Survey of American Attitudes Towards Retirement 2005 (40 pages)
- b. MetLife - The Future of Retirement Living Study 2004 (7 pages)
- c. It's Not Your Mother's Retirement: Study of Women & Generational Differences 2007 (36 pages)
- d. AARP - Home Care Quality: Emerging State Strategies to Deliver Person-Centered Services 2006 (39 pages)
- e. SIR Senior Market Report - 2007 Financial Planning Study

7. Baby Boomer Studies & Reports - Impact on Workforce

- a. Living Longer, Working Longer: The Changing Landscape of the Aging Workforce 2006 (28 pages)

8. Age Wave Planning - Newspaper & Magazine Articles

- a. American Communities Not Prepared for Aging Population
2007 About.com, Inc, a part of The New York Times Company
- b. 10 Ways Communities Can Prepare for the Aging Population
2007 About.com, Inc, a part of The New York Times Company

- c. Midlife Medicare: The Case for Reform Heats Up
Region Focus, Winter 2007
 - d. Cities Revisit Needs of the Elderly
USA Today, May 13, 2007
 - e. No Place Like Home: AARP's View on Livable Communities
AARP, September 2005
 - f. Livable Communities & Aging In Place
AARP, Special Edition 2005
- 9. Miscellaneous Studies**
- a. The 2006 Anholt State Brands Index: How The World Sees the States