

Planning for Our Future
Executive Summary of State Plan Breakout Sessions
November 2-3, 2011



December 9, 2011

Table of Contents

Introduction	1
Breakout Sessions	2
Innovation Incubator for Services for Senior Pennsylvanians and Persons with Disabilities	2
Communities to Age and Live Well.....	4
Revitalize and Rearchitect Aging Services and Services to Those with Disabilities	6
Promote Health and Wellbeing	9
Effective and Responsive Management	10
Crossover Concerns	13
Conclusion	16

Introduction

In November 2011, the Pennsylvania Department of Aging (PDA) and the Office of Long-Term Living (OLTL), along with their partners, the Pennsylvania Association of Area Agencies on Aging (P4A) and the Pennsylvania Council on Aging (PCoA), met in Hershey, Pennsylvania for their Annual Statewide Meeting.

One of the objectives of the meeting was to gather input from attendees to assist in the development of the State Plan for Aging, as mandated by the United States Department of Health and Human Services' Administration on Aging. All of the conference attendees had the opportunity to participate in breakout sessions covering all five State Plan policy themes:

- Innovation Incubator for Services for Senior Pennsylvanians and Disabled Individuals
- Communities to Age and Live Well
- Revitalize and Rearchitect Aging Services and Services to Persons with Disabilities
- Promote Health and Wellbeing
- Effective and Responsive Management

A panel of subject matter experts from the Department briefly introduced each breakout topic, providing important background information to help frame the discussion. The primary focus of the sessions was on the input of the planning partners. These comments provided 67 pages of data. To ensure the comprehensive coverage of each theme, this summary presents a compilation and refinement of opinions, ideas and recommendations across all breakout sessions on each theme. The result is a summary of issues and challenges related to each of the five themes, as well as a range of potential solutions suggested by the planning partners.

This report also highlights numerous crossover concerns—those that came up in more than one of the five themes. Within each theme area, these items are marked with asterisks; an additional section on the crossover concerns is also included. Items from the breakout sessions are numbered for the convenience of the reader; the order does not indicate the priority of one item over another.

The information provided by conference participants and presented in this report will serve as an invaluable preliminary resource for the Department and its partners to use in developing the State Plan. Many additional sources of input, including focus groups, online submissions and public hearings, will provide further guidance to the Department and its partners in ensuring that the State Plan meets the needs of all older Pennsylvanians and persons with disabilities.

Breakout Sessions

Innovation Incubator for Services for Senior Pennsylvanians and Persons with Disabilities

An Innovative Incubator for Services for Senior Pennsylvanians and Persons with Disabilities is an arena—either physical or virtual—designed to find, test, and demonstrate innovative solutions for improving the quality of life for Pennsylvania’s seniors and persons with disabilities. It will comprise a network that supports the development and use of these innovations and builds the capacity (including financial resources) for delivering these innovations.

Issue/Challenge: How do we help to ensure the consistent, streamlined delivery of services and care?

Potential Solutions

1. Ensure that state policies are balanced so that those in need do not fall through the cracks.
2. Promote the role of Area Agencies on Aging (AAAs) as the face of Aging. Do a better job of connecting people with their AAA through “branding.”*
3. Make good data accessible to local aging organizations to assist in their planning and programming.*
4. Prioritize. AAAs cannot and should not be trying to serve everybody. Be creative in programming. Be wary of destroying innovative practices by insisting that a “one size fits all” approach will work.*
5. Get services to people, rather than people to services.* Provide senior centers with the means to provide their own transportation (e.g., vans, volunteers, and contracts with independent providers beyond Shared Ride) and the means to share these services between centers. Ensure that transportation is door-to-door, rather than curb-to-curb. Explore solutions to the barrier of liability insurance.

Issue/Challenge: What changes can we make to ensure that resources are allocated appropriately and effectively?

Potential Solutions

1. Permit some flexibility within mandates for more local control of how resources are allocated.*
2. Reallocate the majority of lottery money to aging initiatives.

*Denotes a crossover concern

Issue/Challenge: What steps can we take to promote better program communication?

Potential Solutions

1. Create an easy way to promote sharing of innovative practices.* Look to the Pennsylvania Association of Senior Centers as a model for sharing.
2. Do more to communicate to consumers that they must not wait until they are in crisis before contacting their local AAAs.*
3. Provide consistent, current information regarding programs at the state level (e.g., PACE).*
4. Continue to educate program providers, such as physicians and their staff.*
5. Include consumers in the conversation; don't presume to know what people want.

Issue/Challenge: How can collaborating with others help us address gaps in service delivery and funding?

Potential Solutions

1. Develop collaboration among private and public partners to address housing issues and keep seniors in their homes. Encourage heightened awareness in existing neighborhoods to create sustainable environments.*
2. Reach out to and piggyback with local partners in community events and through resource sharing (especially for transportation, meal preparation, nutrition, and education).*
3. Provide help in developing and sustaining local partnerships. Include municipal officials for practical, community-based initiatives on issues such as zoning.*
4. Explore and work with universities and other institutions that have created benchmarks for innovative solutions (e.g., housing, technology, nutrition, and recreation).

Issue/Challenge: What can we do to develop and promote the vital role of senior centers?

Potential Solutions

1. Permit alternatives to mandated 1/3 USDA requirements in the choice of meals and how they are prepared.* Serve seniors meals that they like and can take home if they choose.
2. Restructure senior centers to encourage more congregate meals (versus home delivery).
3. Advertise services available in senior centers and other innovative programs.* Target baby boomers. Be creative in programming to attract diverse consumers. Encourage senior centers without walls.*
4. Recognize and promote the value of adult day services.* Educate those who work with older consumers and disabled persons, as well as consumers and their families.

Issue/Challenge: What additional resources can we provide for caregivers and others who work with seniors and individuals with disabilities?**Potential Solutions**

1. Encourage employee assistance programs to provide resources for adult children with aging parents (the sandwich generation), as well as resources for the children themselves to plan for their older years.*
2. Encourage and expand volunteer opportunities.*

Communities to Age and Live Well

The theme of Communities to Age and Live Well has at its core aging in place (AIP)—that is, the ability to live in one’s home as long as it remains safe, comfortable, and medically possible. While there are a number of AIP models, such as Naturally Occurring Retirement Communities (NORCs) and Village Networks, the key is providing individuals with options for making the right choice for their circumstances.

Issue/Challenge: What consideration or accommodations must we make in funding and assistance for adults to age in place?**Potential Solutions**

1. Consider the supports necessary to keep individuals out of nursing homes.* Eliminate financial barriers to accessing personal care homes.
2. Provide supports for the working children who care for these individuals (including flexibility with employers and the need for competent, reliable, and trustworthy help).*
3. Provide real incentives for those who want to work with older individuals, including older citizens who may be caregivers and need the income.*
4. Create more assistance opportunities and resources for those in the middle-income range.*
5. Continue to push property tax relief for older individuals.

Issue/Challenge: What can we do to allow individuals to stay in their homes?**Potential Solutions**

1. Take into account the strong supply of housing stock in the state. Expand upon programs for retrofitting and refurbishing these homes, where feasible.* Explore how Habitat for Humanity could serve as a model.
2. Address how to keep people in their homes, regardless of whether they live in the city, suburbs, or in rural areas.* Work with other programs to address deteriorating conditions, economies, and infrastructure in communities where older people live.

3. Explore tenant/homeowner models for shared expense in areas where housing is expensive or where foreclosure rates are high.

Issue/Challenge: How do we ensure that transportation and other systems guarantee accessibility to services?

Potential Solutions

1. Develop additional and more readily accessible transportation options, particularly for those living in rural areas.*
2. Encourage regional cooperation. Eliminate fragmented systems and provincialism.*
3. Narrow the discrepancy in transportation services between those on Medical Assistance and the elderly in general.
4. Be certain that PDA is fully engaged on this issue to enact change at the state level and to leverage resources for greater community cooperation.*
5. Consider walkability studies to ensure that older individuals can safely cross the streets in their communities.
6. Do more to encourage younger doctors to stay in Pennsylvania (to alleviate gaps in care as older providers retire).

Issue/Challenge: How can we protect those at greatest risk?

Potential Solutions

1. Set up additional safeguards and education for those older consumers at greater risk: the single person, widow, or widower; those living alone; those with no family; older women who are financially inexperienced, suffer cognitive disorders, or experience confusion due to unmonitored prescription medications; those who are uneducated; those who are non-English speaking; and the senior homeless.*
2. Develop public/private partnerships to address not only the needs of older people but to protect them from physical, emotional, and financial abuse.

Issue/Challenge: How can we encourage greater individual responsibility?

Potential Solutions

1. Develop more long-term care insurance options (in both the public and private sectors).*
2. Educate all adults on the need for saving and planning for their older years, rather than relying on Medicare as their insurance policy.*
3. Promote self-management.

Issue/Challenge: What steps can we take to improve program communication and delivery?**Potential Solutions**

1. Develop a media campaign that encourages individuals to reach out to the AAA before they hit crisis mode.*
2. Use existing public and private mechanisms (e.g., lottery ads and tax bills).*
3. Use OLTL's rebranding initiative to support a consistent message.*
4. Enlist "gatekeepers" (such as pastors, doctors, visiting nurses, neighborhood groups, and senior centers) to reach out with more informal supports and earlier intervention.*
5. Streamline processes to ensure quicker access to services and programs.*
6. Appoint an advocate for the aging and disabled within each state agency.
7. Provide flexibility in programming and budgeting for senior centers. Develop true community centers, where people of all ages gather.*

Revitalize and Rearchitect Aging Services and Services to Those with Disabilities

Revitalize and Rearchitect Aging Services focuses on examining the spectrum of existing services, and exploring new means for better programming and service delivery, particularly in terms of outcomes and client satisfaction. Initiatives within this theme area must consider the diverse needs of Pennsylvania's seniors and persons with disabilities, now and in the future.

Issue/Challenge: What steps can we take to improve program communication and delivery?**Potential Solutions**

1. Ensure that information is disseminated through a variety of means.* Develop best practices for communicating with those without Internet access, those who have visual, hearing, or other impairments, and those who are non-English speaking.
2. Encourage the Department to take the lead in addressing and defining "consumer choice."
3. Promote better understanding of acute care versus in-home services. As part of the process, make the Social Assistance and Management System (SAMS) more user-friendly and efficient. (Note: SAMS is the reporting system AAAs currently use to report their activities to the PDA.)*
4. Reconsider the use of jargon; provide simpler definitions for consumers.
5. Create a common application for all programs.
6. Develop a clearinghouse for best practices.*

7. Consolidate meal programs to eliminate competition between free meal programs and those that are private-pay.
8. Recruit more volunteers for the Ombudsman and APPRISE programs, especially among recently retired insurance and healthcare professionals. Do more to promote these programs.
9. Prepare AAAs and other agencies for a diversified elderly population.* Encourage greater diversity on advisory councils and within aging agencies. Break down cultural barriers.
10. Brand AAAs to promote their services and role.*
11. Collaborate with other agencies in cross-programming related to aging issues (such as healthy living and mental health).*
12. Work with local communities on advocacy to build age-friendly communities, form partnerships, and publicize aging issues.*

Issue/Challenge: What can we do to allow individuals to stay in their homes and with their families?

Potential Solutions

1. Focus on quality housing for low-income individuals.
2. Promote shared housing and look at associated zoning restrictions that create barriers.*
3. Implement greater tax breaks and low-interest loan options for home renovation/retrofit.
4. Break down barriers to multi-generational housing.*
5. Provide guidance on how to develop Naturally Occurring Retirement Communities (NORCs).

Issue/Challenge: How can we protect those at greatest risk?

Potential Solutions

1. Provide more funding for protective services and other means to engender a safe, in-home environment.*
2. Strengthen faltering guardianship programs.
3. Provide AAAs with more assistance in dealing with financial exploitation.*

Issue/Challenge: How do we address access to transportation?

Potential Solutions

1. Develop regional systems (rather than county-by-county).* Look at existing models such as Rabbittransit of York and Adams County.
2. Search for ways to decrease wait time and shorten trips by linking essential services to routes.
3. Determine who will take ownership at the state level for resolving transportation issues.*

*Denotes a crossover concern

Issue/Challenge: What additional resources can we provide for caregivers and others who work with seniors and people with disabilities?

Potential Solutions

1. Get the word out on programs available to caregivers.*
2. Provide greater incentives to working spouses to stay home and provide care.
3. Promote adult day services.*
4. Develop peer volunteer supportive assistance programs.*

Issue/Challenge: How do we ensure greater access to services?

Potential Solutions

1. Enable greater access to services for those in the middle-income range.* Perhaps create fee-for-service programs for sharing costs.
2. Allow access to all Medical Assistance programs, not just the Living Independence for the Elderly (LIFE) Program, to move consumers off waiting lists and into programs.
3. Eliminate restrictions on assistance for those aged 60 to 64 years.
4. Allow AAAs more flexibility with state funding.* Promote shared services with other counties/states. Encourage local creativity as opposed to searching for eligibility within state regulations.
5. Restructure senior center programming.* Include childcare centers to allow grandparent caretakers the opportunity to participate in programs. Foster intergenerational programs that teach computer skills. Advertise creative programming. Consider senior centers without walls.

Issue/Challenge: How do we encourage greater individual responsibility?

Potential Solution

1. Prepare for the aging of baby boomers.* Partner with businesses, industries, and insurance companies on pre-retirement counseling. Consider issues related to the potential poverty of these individuals due to job and benefit losses.

Promote Health and Wellbeing

This theme area considers what constitutes a healthy lifestyle and wellbeing, including factors such as nutrition, disease management and fitness, as well as the benefits of healthy behavior for both the individual and the public. It also includes how to refine, develop, and promote initiatives for health and wellbeing for seniors and individuals with disabilities of all ages.

Issue/Challenge: How do we enhance program communication and collaboration?

Potential Solutions

1. Create or enhance programs that provide seniors and individuals with disabilities with a sense of purpose, such as volunteer peer-assistance and mentoring.*
2. Do more to eliminate the perceived stigma associated with subsidized health and wellbeing programs such as the Supplemental Nutrition Assistance Program (SNAP). Help seniors overcome their intimidation of the paperwork involved with these programs.
3. Consider more private/public partnerships for senior center fundraising and other initiatives/needs (e.g., grant writing). Recruit partners from insurance companies, gyms, and healthcare organizations.
4. Strengthen existing partnerships that may be in jeopardy due to funding.
5. Provide the means, including the Internet and Facebook, to showcase successful programs.*

Issue/Challenge: What can we do to develop and promote the vital role of senior centers?

Potential Solutions

1. Promote senior centers as sites for overall health and wellbeing programs (e.g., ability-appropriate exercise classes, emotional support, and socialization).* Get the word out about diverse programming for individuals of all income levels. Revamp their image. Collaborate with private partners to bring programs into the centers (e.g., Curves, Silver Sneakers).
2. Implement the proposed Aging Program Directive (APD) to allow senior centers more flexibility in meal offerings.* Examine regulations related to charging those who can afford it to pay for meals provided by senior centers.
3. Take senior center programs into the community.* Share community resources, such as libraries, community centers, churches, and pools. Reach out with meals as well as activities to those who cannot get to senior centers (senior center without walls).*

Issue/Challenge: What educational opportunities can we create or expand on to promote programs?

Potential Solutions

1. Provide both on-site and virtual demonstrations on nutrition and healthy meal preparation.
2. Promote healthy eating demonstrations as opportunities for both education and socialization.
3. Educate those who provide healthcare and in-home care about aging programs and services. In turn, they can educate those they care for.*
4. Do more to address abuse of legal drugs and overmedication, emotional wellbeing, chronic disease management, and protective services. Partner with insurance and pharmaceutical companies in this effort.
5. Promote more personal responsibility regarding health and wellbeing.
6. Create a speakers' bureau to work with employers and other organizations on counseling people on how to better plan for retirement, including health and wellbeing concerns.

Issue/Challenge: What can we do to allow individuals to stay in their homes and with their families?

Potential Solution

1. Advocate for multi-generational housing.* Eliminate financial barriers, such as ineligibility for supports, when older people have younger family members living with them.

Effective and Responsive Management

Effective and Responsive Management ensures that available resources are used effectively in providing services and support for seniors and individuals with disabilities, in both the short and long term. As part of this commitment to good stewardship, this theme area must also take into account how regulations and policies affect the funding and delivery of services.

Issue/Challenge: How can we ensure the consistent, streamlined delivery of services and care?

Potential Solutions

1. Enhance the continuum of care. Work to streamline the individual service plan (ISP) and other processes to eliminate the service delivery gap.*
2. Increase capacity for delivering services in both funding and personnel.* Give aging services the same attention that waivers receive.
3. Look at how current waiver guidelines may unintentionally promote nursing home care versus the services provided in the home, due to the length of time it takes to access in-home services.

*Denotes a crossover concern

4. Investigate regulations such as the Portable Care Act and other CMS initiatives that might provide more opportunities for consumers.
5. Fully implement Community Choice throughout the state, but first iron out issues that may impede its successful implementation.
6. Create a program within the PDA to mentor and train the next generation of those interested in providing aging services.
7. Address the shortage of healthcare workers and professional caseworkers.

Issue/Challenge: How can we enhance communication and collaboration?

Potential Solutions

1. Develop and enhance community partnerships to close gaps in funding.*
2. Enhance regional collaboration and cooperation.*
3. Develop collaboration among agencies within state government to advance knowledge of and information about available programs.*
4. Share best practices, such as senior centers without walls.*
5. Nurture the relationship between AAAs and PDA/OLTL.* Guide local AAAs on regulations and policy. Ensure that communication and dissemination of information is consistent. Work more closely to eliminate regulations that hamper the flexibility of local providers in the creative delivery of their services. Keep AAAs informed of outcomes and findings on reported abuse cases. Include AAA fiscal officers in discussions regarding fiscal policy. Visit AAAs.
6. Complete and distribute the Home and Community Based Services (HCBS) manual.
7. Upgrade SAMS, as the program is not user-friendly, integrated, or efficient. Use data to establish benchmarks and develop outcome measures.*

Issue/Challenge: What can we do to empower agencies on the local level?

Potential Solutions

1. Assist AAAs in expanding the Domiciliary (DOM) Care Program.
2. Promote local autonomy and de-emphasize standardization.*
3. Ensure that staffing ratios for programs such as adult day services are in line with the size of the community.
4. Revise APD for senior centers.* Also consider how technology affects programs that senior centers are encouraged to run.
5. Be respectful of cultural diversity within Pennsylvania and take this diversity into consideration when delivering services.*

Issue/Challenge: How can we address access to transportation?

Potential Solution

1. Address concerns related to Shared Ride (e.g., inability to cross county and state lines, compatibility with the needs of riders).*

Issue/Challenge: How can we protect those at greatest risk?

Potential Solutions

1. Enforce standards for in-home service providers.* “Re-knit” the security blanket to ensure no harm or neglect.
2. Examine standardized rate setting to help retain transportation and other providers that assist AAAs. Increase reimbursement rates to providers.

Crossover Concerns

Issue/Challenge: How can we ensure clear communication about programs and services?

Communication, whether among state agencies, between local AAAs and the PDA, or between consumers and various aging agencies, must be enhanced. Perhaps the most vocal concerns were related to communicating with consumers on what programs are available and how to reach consumers before they hit “crisis mode.” Participants suggested developing media campaigns using existing public (e.g., lottery ads) and private (e.g., tax bill) mechanisms. They also suggested using OLTL’s branding initiative to support a consistent message regarding the pivotal role of AAAs for accessing services. “Gatekeepers” (such as pastors, doctors, visiting nurses, neighborhood groups, and senior centers) should be enlisted to reach out with more informal supports and earlier intervention.

Participants noted that information should be disseminated through a variety of means, including the Internet and Facebook. This also means developing best practices for communicating with those without Internet access, those who have visual, hearing, or other impairments, and those who are non-English speaking. Participants also asked for better communication regarding innovative practices, including the creation of an easy way share these practices. They suggested that an upgraded SAMS might also serve as a vehicle for sharing best practices.

Issue/Challenge: How can we enhance and streamline the coordination of care?

Participants emphasized the importance of appropriate, consistent, and coordinated health care delivery services for a growing, culturally diverse population across Pennsylvania. More must be done to enhance the continuum of care. Participants suggested streamlining the ISP and other processes to eliminate the service delivery gap and to increase capacity for delivering services, in both funding and personnel. Further, senior services programming must create more assistance opportunities and resources for those in the middle-income range who might not otherwise be eligible for services.

Conversely, participants said that innovative programs would be destroyed by insisting on a “one size fits all” approach. The key, according to these participants, is flexibility within mandates for more local control of how resources are allocated.

Issue/Challenge: How can we keep seniors and disabled individuals in their homes?

A number of common concerns were raised regarding housing. The central theme was allowing adults to age in place. Participants said that all of those in the aging community should consider the supports necessary to keep individuals out of nursing homes (where appropriate), including rebalancing funding and eliminating financial barriers to accessing personal care homes.

Participants suggested collaboration among private and public partners, including universities and other institutions that have created benchmarks for innovative solutions. They encouraged heightened awareness in existing neighborhoods to create sustainable environments. This

includes taking into account the housing stock within Pennsylvania and programs for refurbishing and refitting these homes, where feasible. Participants noted that Habitat for Humanity could serve as a model for a more community-based effort. Facilitating aging in place also requires a look at improving the economy and infrastructure for a given area, whether urban, suburban, or rural, as well as ensuring that quality housing exists for low-income seniors.

Participants offered a number of other suggestions for helping people remain in their communities. These included exploring tenant/homeowner models for shared expense, promoting shared and multi-generational housing, and looking at associated zoning or other issues that might create barriers. Participants also suggested more funding for protective services to engender a safe in-home environment and to provide AAAs with more assistance in dealing with exploitation.

Issue/Challenge: How can we enhance transportation systems to ensure access to services?

Participants pointed out the close relationship between housing and transportation in linking older adults to essential services. They talked of the need to develop additional and more readily accessible transportation options, particularly for those in rural areas.

They asked the state to help in encouraging regional cooperation and eliminating fragmentation. In addition, participants asked the state to explore why liability insurance is such a barrier to implementing private transportation programs. Participants challenged PDA to get closer to and take ownership of the issues surrounding transportation, to enact change at the state level and to leverage their resources for greater community cooperation.

Issue/Challenge: What can we do to develop and promote the vital role of senior centers?

Participants also said that senior centers should advertise their role in the overall health and wellbeing for individuals of all income levels. Centers should be given more flexibility and creativity in programming and budgeting. Participants noted the success of “centers without walls,” and encouraged more private/public partnerships for funding programs like these that bring services to the consumer. To do so, they suggested greater sharing of community resources such as libraries, community centers, churches, and pools.

Participants urged the implementation of the proposed APD to allow senior centers more flexibility in meal offerings. They also suggested examining regulations related to charging those who can afford it to pay for meals provided by senior centers. In addition, more should be done to promote adult day services and to enhance programs that provide people with a sense of purpose, such as volunteer peer-assistance and mentoring.

Issue/Challenge: What means can we develop to provide more support for caregivers?

Participants stated that additional supports should be provided for the working children who care for their aging parents or disabled relatives. Suggestions included encouraging employers to be more flexible in granting time off when needed, resources to find competent, reliable, and trustworthy help, and education on what programs are available. In addition, participants also suggested providing financial incentives and education for those who want to work with older individuals.

Issue/Challenge: How do we promote individual responsibility?

Participants spoke of the need to educate all adults on the need for saving and planning for their older years, rather than relying on Medicare as their sole medical insurance option. Participants said that employee assistance programs might include resources for adult children with aging parents, as well as resources for the children themselves to plan for their older years. In addition, more should be done to promote self-management and to develop more long-term care insurance options (in both the public and private sectors).

Conclusion

The thoughtful and diverse opinions, ideas, and recommendations offered by the state's planning partners during the breakout sessions served as the basis for identifying the broad issues, challenges and potential solutions presented in this report. The partners provided valuable input regarding the policy themes and the numerous crossover concerns that arose in multiple themes.

The result of this interaction between state agencies and their planning partners reflects an important direction in developing the State Plan: addressing emerging priorities collaboratively. These priorities include planning and coordinating quality services; educating and informing consumers, providers, public leaders, private partners, and other stakeholders; recognizing and responding to unique local needs; and managing local initiatives, decision making, policy formulation, and budget development.

The information contained in this summary is only the beginning as PDA, OLTL and their partners forge ahead in developing the State Plan. The PDA and OLTL commend their planning partners for their help in setting the tone and bringing their essential voices to the discussion for ensuring that the State Plan meets the needs of older adults and individuals with disabilities throughout the Commonwealth.