

Executive Summary

County Executive Leggett's Senior Summit

Introduction

Preparatory work for the Senior Summit included two strategic planning processes conducted in collaboration with outside consultants. Phase I (completed in May 2007) was a report titled *Imagining an Aging Future for Montgomery County, Maryland*, developed by Towson University Center for Productive Aging. Phase II (completed October 2007), titled *Senior Outreach Strategic Communications Report*, was developed by Reingold, Inc. Both reports found “widespread satisfaction among seniors and their caregivers with the programs and services the County provides” (Reingold, 2007). However, both reports underscored the need to (1) improve both internal and external communication about the range of available services to seniors and caregivers; and (2) establish a mechanism for improving coordination and collaboration among County departments and with private partners responsible for delivering senior services.

In light of the findings of these reports and the awareness that the senior population is projected to nearly double between 2000 and 2030, County Executive Leggett convened department directors for a day long retreat on May 14, 2008 to focus on how Montgomery County Government, in partnership with private providers and the faith community, can promote vital aging for all its seniors. On this date, he also established the Senior Sub-cabinet on Vital Aging and directed that a Senior Summit be convened in November 2008. The purpose of the summit would be to identify priority issues affecting the senior population, develop strategies and action plans to meet current and future needs, and take the first steps towards developing collaborative relationships between County departments and community stakeholders to ensure that Montgomery County is a good place for older adults to live and retire.

Process

Pre-Summit

Under the leadership of the Senior Sub-cabinet on Vital Aging, preparations for the Senior Summit began in June 2008. White Papers on critical issues were developed modeled after the national *Blueprint for Action: Developing a Livable Community for All Ages*, a joint product of the National Association of Area Agencies on Aging and Partners for Livable Communities with funding from the MetLife Foundation. The eight topic areas addressed were: Health and Wellness, Housing and Zoning, Home and Community Supports, Civic and Social Engagement, Transportation, Safety, Employment, and Communication and Outreach. Pre-summit work groups comprised of public and private stakeholders were convened on each of these eight topics to brainstorm and prioritize recommendations. The result of this process was that the work groups developed a total of 188 unique recommendations, with 87 of them collapsed by participants into 28 broad recommendations for further discussion and prioritization at the Summit.

Summit

The actual Senior Summit was a daylong event held on November 20, 2009, on the University of Maryland at Shady Grove campus attended by nearly 300 stakeholders. County Executive Leggett devoted his entire day to attending the Summit, sharing his vision of the County as it relates to senior issues and learning from other participants. County Council members George Leventhal and Roger Berliner spoke on behalf of the County Council, and U.S. Senator Barbara Mikulski had a staff member speak on her behalf. The invited luncheon speaker was Sandy Markwood, Chief Executive Officer, National Association of area Agencies on Aging; whose presentation was titled, ***The Maturing of Montgomery County: How The County Can Prepare to Effectively Meet the Needs of its Aging Population.***

Participants at the Summit prioritized the 28 recommendations by popular vote, than broke up into work groups to brainstorm action steps that could help the County achieve the goals of the recommendations. This process produced 177 different potential action steps for further consideration.

Post-Summit

In order to move forward with a coherent and organized implementation plan, the Senior Sub-Cabinet tasked the Consolidation and Feasibility Task Force to review all the Summit and Pre-Summit materials and submit a list of consolidated and integrated recommended action steps that are feasible and realistic.

The Task Force in reviewing the materials found that the actions steps produced at the Summit were in reality a mixture of: action steps, principles and additional recommendations. Given the mandate to identify specific and concrete implementation steps, the Task Force went through the material item by item to collapse them into discrete action steps. As a result of this process the 177 recommendations emerging from the Summit were initially consolidated into 123 discrete action steps.

As part of the review process it also became apparent that the work produced by participants in the Summit and Pre-Summit process represented an integrated mixture of two intimately related concepts: 1) goals and outcomes related to improved quality of life for the senior population, and 2) processes and actions that enable those goals and outcomes to be achieved. It was deemed essential to take both factors into consideration because goals without steps to achieve them were insubstantial, and actions without goals were a recipe for inefficiency. Through this process the 177 Summit recommendations, which were consolidated into 123 action steps, were further distilled into 46 potential action items; with the awareness that many of these items were applicable across multiple goals. For example, “*investigate best practices and determine if they can be applied in County*” was a single action bullet but it could reasonably be applied to each of the substantial outcome categories developed.

The final step undertaken by the Task Force was to look for cross cutting initiatives that were feasible given current constrained resources that would allow for realization of the principle goals while addressing the issue of sub-optimal collaboration among County departments. Upon review, nine major potential initiatives emerged from the mass of recommendations. These nine

initiatives, along with the major recommendations of each of the topical workgroups are submitted as part of this final report.

Principles

It is important to note that aside from the discrete recommendations and action steps, the Senior Summit process elicited a number of consistent principles or themes that should be inherent in any steps taken by the County. The major principles identified were:

- **Diversity:** Any actions must be sensitive to the diversity of the senior population. The senior population (regardless of whether defined as age 60+ or age 65+) is extremely diverse, with diversity to be understood not merely in terms of race and ethnicity, but also along the lines of language, disability, age, income and resources.
- **Partnerships:** County government cannot and should not expect to do this work alone. In order to achieve the goals and outcomes stated, the County must have the active involvement of its private sector partners (non-profits, business community, faith communities, etc.) and residents.
- **Civic Engagement:** The skills, time, and wisdom of older adults represents one of the growing renewable resources available to our communities. Given the projected increase in needs for some of our most vulnerable residents, and the constraints on public dollars, many of the proposed efforts will require volunteer commitments in order to create a stronger and more responsive community.
- **Planning:** In order to optimize the effectiveness and efficiency of services the County must make every effort to identify and implement evidence based and best practices.
- **Accountability:** Mechanisms must be in place to ensure that action steps are implemented and progress toward goal attainment measured. Implicit in these recommendations is that actions are inter-departmental in nature; hence some centralized oversight process must be in place to ensure that actions do not “fall between the cracks.”

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