

FINAL REPORT

**COMMISSION ON AGING
SUMMER STUDY PROGRAM**

**THE NEED TO IMPROVE ADVOCACY FOR OLDER ADULTS IN
MONTGOMERY COUNTY PLANNING**

September 1, 2014

Charles Kauffman, Summer Study Chair

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BACKGROUND AND APPRECIATION

The Commission on Aging (COA) serves as an advocate for the health, safety and well-being of Montgomery County's older residents. Annually, the COA conducts Summer Studies on issues of concern to the community.

This study arose from concerns that despite the increasing number of older adults in the County, they lack adequate visibility and representation in the County's planning process when Master Plans and Sector Plans are being developed. This report explores these issues and makes recommendations to increase participation and representation in fulfilling the County's Senior Agenda objectives for a Community for a Lifetime.

On behalf of the Commission on Aging Summer Study, we thank our moderator Kenneth Hartman, for his generosity, vision and guidance throughout the Study. We also extend our boundless appreciation for the clarity, brilliant leadership and empathy of Dr. Odile Brunetto, our COA guardian angel. We are so fortunate to have their understanding, commitment and skillful guidance.

We thank our panelists Ann Meade, Bob Kaufman, Gwen Wright, Rick Nelson, Gail Kohn, Elinor Ginzler, Chuck Short, Tedi Osias and Rose Krasnow for their generosity in sharing insights, information, experience and valuable suggestions. It is important for the Commission to maintain close personal relationships with them. We are delighted with the discussions and interaction of participants, guests and members of the COA which clarified many issues, and suggested a medley of achievable recommendations.

We thank DaCosta Mason and Isabelle Schoenfeld for their extreme patience, and valuable contributions to this report, and recommendations to the COA.

We are grateful to the County and the COA for allowing us to initiate and lead this Summer Study. It surpassed our expectations and allowed us to engage with experienced, intelligent and deeply committed individuals whose recommendations will enhance living in Montgomery County for decades to come.

Respectfully submitted,

Charles Kauffman, Chairman



1. EXECUTIVE SUMMARY

Jane Jacobs said “*Cities have the capability of providing something for everybody, only because, and only when, they are created by everybody.*”

Montgomery County’s rapidly growing older adult population will soon include 20% of the County’s residents. However, it is questionable whether senior needs will receive adequate attention in the County’s planning process over the next 20 years. Currently, the County’s Master and Sector plans call for massive mixed-use, residential and commercial urban complexes located at highway and public transit hubs, i.e., White Flint, Westbard, Kensington, Chevy Chase Lake, and a dozen others.

On May 22, 2014, the Commission On Aging (COA), recognizing the need for the County to continue implementing the Senior Agenda and Community for a Lifetime goals, and the need to enhance older adult representation in County planning, approved a summer study to:

1. Interview key members of the planning board; understand the board’s composition, its legal basis and the appointment process; assess the role of developers, county departments, land use attorneys and the branches of the County government.
2. Interview senior planners in order to develop a checklist of senior essentials. Define the job of a senior representative (and make clear that there may be conflict resolution processes in which said representative will participate)
3. Interview members of the Committee of the County Council (PHED Committee) and representatives of the County Executive to determine the best legal way to obtain high level staff representation on the Planning Board.

The three-session study investigated the roles of the County Planning Department and Board, Executive Departments, Council, developers, the public, and the COA, in addressing senior needs. Each session’s invited experts provided information and insights, identified gaps in those roles, and suggested means to address them.

The Summer Study “Recommendations” will ensure that

- senior concerns are recognized throughout the planning and development process
- all sectors of the County are working towards a livable community
- there is improved communication and coordination between government entities
- the COA’s advocacy role is strengthened
- Montgomery County will consider implementing AARP’S “Livable Communities” and the World Health Organization (WHO) “Age Friendly Cities” program and checklist, providing global stature and economic growth for the County and fulfilling its Senior Agenda and Community for a Lifetime goals.

2. RECOMMENDATIONS

1. The COA should advocate for inclusion of a "Senior" Section in all Master Plans and Sector Plans.
2. The COA should expand the Senior Agenda, using resources cited in this report (e.g. the World Health Organization [WHO] Checklist of Essential Features of Age Friendly Cities) and other resources. This would ensure comprehensive coverage of all the key features of an Age Friendly County and will guide the County Council, County Departments, Planners, Developers, and Advocates in making the County a more livable community for older adults.
3. The COA should recommend that a high-level staff position be created on the County Planning Board to advocate and promote senior issues.
4. The COA should recommend that the County Executive and the County Council coordinate to have a representative from the Planning Board on the Senior Sub-Cabinet, engaging fully as a member with senior County Department Heads.
5. The COA should provide leadership and strong advocacy for older adults in the planning process by building relationships and strategic partnerships with the government, for-profits and non-profits sectors.
6. The COA believes that Montgomery County should become a WHO Age Friendly City [County] because it is a comprehensive approach to ensure that the needs of older adults and everyone else in the community are met. Therefore, COA should advocate with the County Executive/Council that a task group be formed to explore the steps and resources involved in Montgomery County joining the WHO Age Friendly Cities program.

3. SUMMER STUDY SESSION SUMMARIES AND OBSERVATIONS

The Summer Study consisted of three sessions with invited professionals and high level county staff who brought special expertise to each of the sessions. The first two sessions were a panel format and the third session was a roundtable format. Charles "Chuck" Kauffman, the Chair of the Summer Study, introduced each session. The overall plan for the three sessions was described by the Chair:

1. *Interview key members of the planning board: understand the board's composition, its legal basis and the appointment process; assess the role of developers, county departments, land use attorneys and the branches of the County government.*
2. *Interview senior planners in order to develop a checklist of senior essentials. Define the job of a senior representative (and make clear that there may be conflict resolution processes in which said representative will participate)*
3. *Interview members of the Committee of the County Council (PHED Committee) and representatives of the County Executive to determine best legal way to obtain high-level staff representation on the Planning Board.*

Ken Hartman, Director of the Bethesda Chevy Chase Regional Services Center served as the moderator of each session. See Section 4 for the minutes of each session, Section 5 for a list of the participants, and Section 6 for each of the speaker's biographical sketch. A summary of each of the sessions follows:

Session 1 – June 12, 2014

Invited Experts: S. Robert "Bob" Kaufman, Vice President for Government Affairs of the Maryland National Capital Building Industry Association; Anne M. Mead, Partner, Linowes and Blocher LLP; Gwen Wright, Director, Montgomery County Planning Department

Chuck Kauffman stressed in his opening remarks that the purpose of the summer study is to advocate for older adult concerns during the county planning process (see Section 7A for the Summer Study Proposal). He stated that the goal for the first session was to learn about the planning board and the planning process and assess the role and interests of developers and land use attorneys.

The panelists were asked the following question: What are the opportunities for community input to the county planning process?

Gwen Wright summarized the planning and review processes and demographic trends in the county. She indicated that only 20% of remaining land can be developed because of constraints. She pointed out that plans are not yet formulated when early outreach meetings are held, planners cannot control the market, and property owners are decision-makers about specifics of land use. (See Section 7C for Ms. Wright's power point presentation and an Organizational Chart of the Planning Department)

Anne Mead said that property owners are very varied. She pointed out that sector and master plans have a 20 year lifespan and that recommendations from the community are important to land owners. Also, there are opportunities to plan for multi-generational projects.

Bob Kaufman noted that private and public interests have a dynamic relationship that differs in each jurisdiction. He stated that economic opportunity drives development. He indicated that the private sector wants to know upfront, early in the process, what the community wants and then determine

how to meet wants while making a profit. He pointed out that jurisdictions vary in the incentives or regulatory relief. For example, Arlington County has density rules that benefit both younger groups and seniors. Virginia provides incentives for low income and senior housing. In Frederick County, MD the approval process takes about 1 year vs. the 3-4 years in Montgomery County.

Observations:

- Plans are not yet formulated when Planning Department early outreach meetings are held. Older adults do attend such meetings but do not speak with a single voice and are not an effective lobby
- Residents should engage early on in the planning process when plans are not yet formulated
- Older adults can strengthen their voice in the process if priorities are clearly defined and they become a constituency and advocate for priorities, as the environmental lobby does now
- One way to meet public goals is by offering incentives, grants and/or regulatory relief to developers. There are advantages of developing for older adults, e.g., they don't need schools. Therefore there is more land available and density can be increased
- Identify models (e.g., Colorado, North Carolina, Delaware) for incentives that work in other jurisdictions and see what they offer

Session 2 – July 10, 2014

Invited Experts: Elinor Ginzler, Senior Director, Center for Supportive Services, Jewish Council for the Aging of Greater Washington; Gail Kohn, Age-Friendly DC Coordinator; Richard "Rick" Nelson, Director, Department of Housing and Community Affairs, Montgomery County, MD

Chuck Kauffman introduced and welcomed the invited experts. He recapped the highlights of the first session. The focus of this session initially was to establish a basis for checklist of senior requisites and define the role of a planning board "senior" issue staff specialist.

Gail Kohn stressed that the elements of a good community that appeals to older adults also appeals universally across different age groups and that people want to live among multi-aged neighbors. Gail spoke about the World Health Organization (WHO) Age Friendly Cities initiative and their domains and checklist. The WHO checklist (see Section 7D) promotes physical changes as well as a cultural shift. She discussed the steps involved in becoming an Age Friendly City. Age Friendly DC established 10 Task Force groups for each of the eight WHO domains (outdoor spaces and buildings; transportation; housing, social participation; respect and social isolation; civic participation and employment; communication and information; community and health services) plus two local domains, i.e., emergency preparedness and elder abuse and neglect and fraud. She indicated the importance of the participation of the different sectors of the community including business and academic.

Elinor Ginzler discussed the AARP Livable Communities effort over the last 15 years including prioritizing supportive community services and adequate mobility options that facilitate personal engagement of residents in civic and social life. She said that 95% of seniors don't move and moves primarily occur to be near friends or family or because of health issues. She related some findings that indicate that high community engagement contributes to higher life satisfaction and the connection between a person's behavior and feelings of well-being.

Rick Nelson emphasized that there is not one solution and there is a question about whether planners really listen to local needs. He talked about the FY 15 collaboration between DHCA and the Planning Board on affordable housing near the Purple Line. He also mentioned that there is a housing needs assessment underway. Rick recommended: 1. Establish a framework of senior issues in every plan to

be addressed with or without proposed staff person/senior advocate, 2. Locate proposed staff position [advocating for Seniors in Planning process] in the Executive Office and not in the Office on Aging; 3. Ensure that the executive branch looks more closely at all master plans in context of housing and senior services.

Observations:

- The person who leads an Age Friendly City or other similar type of effort should be located in the Executive Office for influence and political capital
- Strategic and other plans should incorporate goals associated with age friendly living.
- Consider integrating the WHO domains (in the Age-Friendly Checklist) into the Senior Agenda (see Senior Agenda in Section 7B)
- Every plan should include a section devoted to senior issues
- Important to bridge the unique structure of the Planning Department with the Executive Branch
- Consider promoting a staff position who would advocate for older adults in the Executive Branch
- Important to get agreement between the Planning Department and the Executive Branch on questions to be addressed during the master planning process relative to housing and senior services
- Need for a coordinated effort between advocacy groups to generate interest and to vocalize older adults needs in the planning process for all projects

Session 3: August 5, 2014

Invited Experts: Rose Krasnow, Assistant Director, Department of Planning; Rick Nelson, Director, Department of Housing and Community Affairs; Tedi Osias, Advisor to Councilmember Nancy Floreen on Land Use and Housing; Charles "Chuck" L. Short, Special Assistant to County Executive Ike Leggett

Chuck Kauffman provided an overview of the prior sessions and noted that one of the purposes of this session was to determine ways and means in the County executive and legislative process of obtaining high level staff attention to "senior concerns" on the planning board. The moderator, Ken Hartman, opened the discussion on how Montgomery County measures up in the senior engagement and the planning process.

The third and final session was conducted in a roundtable format with open discussion by all attendees.

Demographics in the county indicate that some communities, such as Bethesda and Chevy Chase, have 65+ populations of more than 20%. The planning process therefore needs to take into greater account the needs of older adults.

The Planning Board is using new technology to permit participation in the planning process without having to attend hearings. The Planning Board also uses on-line surveys, email comments, twitter and video streaming to increase participation. Nevertheless, it is multi-faceted and requires an understanding of all phases of the planning process and the differences in the various plans and operational issues.

Observations:

- The Planning Process is a complex system to understand and navigate for most citizens and especially for older adults. There are multiple sectors involved including the Planning Board, County Council, Executive Branch agencies, advocacy groups, and individuals

- Need to educate the community in an effort to develop and increase the number of advocates
- Need for greater expertise on the changing needs of older adults by advocates and those in decision-making positions
- Need for advocacy groups to establish relationships with other organizations in the community
- Consider updating the 2007 Towson University study on the needs of older adults
- Include an older adults category in the development of Master and Sector Plans as there are for child care and the environment
- Develop agreed upon elements of an age friendly community between the County Executive, County Council and the Planning Board; add more specificity to the Senior Agenda
- Recruit members for COA with specific needed expertise
- COA should create more partnerships and relationships with decision-makers, advocacy groups, community organizations and other change agents

4. MINUTES OF SUMMER STUDY SESSIONS

JUNE 12, 2014 SESSION

The first session of the Summer Study was held on June 12, 2014 at 401 Hungerford Dr., Rockville. Chair, Chuck Kauffman introduced and thanked the speakers, Gwen Wright, Head Montgomery County Planning, Ann Meade, land use attorney, Bob Kaufman, a developer and Ken Hartman, BCC Regional Services Center director. Attending were Commissioners Chuck Kauffman, Miriam Kelty, Isabelle Schoenfeld, Sally Shea, Jerry Morenoff, Reuben Rosenfeld, Jack Sprague, Sayed Yusef, and Austin Heyman, Leslie Marks, Robin Henoach, Mitch Markowitz and Odile Brunetto. Chuck stressed that the purpose of the summer study is to advocate for older adult concerns during the county planning process. He posed the question: What are the opportunities for community input to the county planning process? Is community involvement in the process meaningful? Does it provide adequate input for seniors to express their needs?

Gwen Wright was the first presenter. She summarized the planning and review processes and demographic trends in the county. She is working to make the planning process responsive to the new reality of the County: only about 20% of remaining land can be developed because of constraints; small area plans are replacing large area plans; public policy goals will be respected, e.g. green space is being preserved and growth corridors are near transit; transit-oriented development; affordable housing; and increased outreach in the planning process to involve residents.

She pointed out that plans are not yet formulated when early outreach meetings are held and suggested that these meetings are worthwhile to participate in. She noted that seniors do attend such meetings and ask for health care services near housing, recreation space, and nearby shopping. She added that planners cannot control the market – property owners are decision makers about specifics of space use. Discussion noted that millennials and seniors are seeking similar services and amenities. Ms. Wright's power point presentation is attached.

Ann Meade, a land use attorney, said that property owners are very varied. She pointed out that sector plans and master plans have a 20 year lifespan, that many owners are interested in them, and that recommendations from the community are important to land owners. Some such meetings are not well attended. She recommended that residents engage in the process early. There are opportunities to plan for multigenerational projects.

Bob Kaufman noted that private and public interests have a dynamic relationship that is different in every jurisdiction. He said that economic opportunity drives development. For example, SC market forces have driven senior housing in that state, while Silicon Valley market forces drive other development. He said the private sector wants to know up front, early in the process, what the community wants and then will figure out how to meet wants and make a profit. He noted many constraints map with both the site to be developed and with the county approval process. One way to meet public goals is by offering incentives, grants and/or regulatory relief. He said there is tension among different markets and that markets change. But, there are some advantages of developing for seniors, e.g. they do not need schools. Therefore there is more land available and density can be increased. He said the MCNPPC does not make it easy for developers to cater to seniors and contrasted MoCo with Arlington county which he said appeals to both younger groups and to seniors because of its density rules. Virginia provides incentives for low-income and for senior housing. He recommended that the Summer Study group identify models that work in other jurisdictions and see what they offer. Examples of places friendly to development for seniors include Colorado, NC and DE. Incentives for developers and low or no state taxes for seniors make some places attractive for aging in place.

Several specific examples were discussed. Builders build up rather than at ground level (which does not require steps). The reason is partly aesthetic and partly economic – people like homes that are elevated and building up involves less dirt to move and easier water control. Without incentives, e.g. reduced permit and other fees, it is unlikely that developers will build at ground level to make homes accessible. It was pointed out that some design features that are important to seniors are probably economically feasible, e.g. benches along streets and walkways, solid walks as opposed to brick pavers, adequate lighting and pedestrian friendly features. A member pointed out that often we plan for yesterday's needs, e.g. libraries that are large to house books in an era when electronic media are being used more frequently and when those media may be well suited to seniors' needs (can enlarge type, increase brightness, easy to carry and hold, etc) There was agreement that adapting to change is necessary.

Frederick was mentioned as an example of a nearby jurisdiction that is more development-friendly. For the developer, the approval process there takes about one year vs. 3-4 years in MoCo.

A member asked whether the MCNPPC has a research division – it does. It was stressed that community involvement early in the planning process is an effective strategy.

The needs of seniors are known and should be taken into consideration when undertaking infill development, urban or suburban development. The lack of transportation within communities was noted as a problem and as an example of the lack of but need for integrated planning across county government departments/agencies. Other needs were mentioned: single family homes on one level, more accessory apartments, elevators (can be planned for as options if stack closets on top of one another), and forest conservation.

The guests agreed that seniors can strengthen their voice in the process if we define priorities clearly and become a constituency and advocate for our priorities, as the environmental lobby does now. Although there are a high proportion of seniors who come to hearings and community meetings, they do not speak with a single voice and are not an effective lobby. Also, seniors and their advocacy groups need to educate themselves about the developers'/builders' world and think in terms of incentives rather than in terms of restrictive regulations and mandatory requirements. Many developers live in MoCo and want to succeed in building community. Improving our community is a common goal. We need balance, regulations that are meaningful and serve to protect citizens, and input from communities about their priorities.

Miriam Kelty
June 11, 2014

JULY 10, 2014 SESSION

The second session of the Summer Study was held on July 10, 2014 at 401 Hungerford Dr., Rockville. Chair, Chuck Kauffman thanked the speakers and introduced Ken Hartman, BCC Regional Services Center director. Mr., Hartman introduced the speakers: Gail Kohn, Age-Friendly DC Coordinator, Elinor Ginzler, Senior Director of the Center for Supportive Services at the Jewish Council for the Aging of Greater Washington and Rick Nelson, Director of the Department of Housing and Community Affairs of Montgomery County. In attendance: Syed Yusef, Gail Kohn, Charles Kauffman, Elinor Ginzler, Mitch Markowitz, Katherine McCallum, Rick Nelson, Judith Levy, Stephanie Dowling, Sally Shea, DeCosta Mason, Robin Henoeh, Leslie Marks, Austin Heyman, Reuben Rosenfeld, Jerry Morenoff, Ken Hartman, Odile Brunetto, Isabelle Schoenfeld, and Arva Jackson. There was a brief recap of last meeting and Ken Hartmann talked about this middle session being an opportunity to narrow the focus and look for areas and opportunities for change.

Gail Kohn was the first presenter. She prioritized openness and honesty, creating relationships across generations and providing continuum to ensure people have ways to engage in community and have access to required services. She stressed that elements of good community that appeal to older adults appeal universally across ages and that people want to live among all-aged neighbors. Ms. Kohn talked about the World Health Organization (WHO) Age Friendly Cities domains and checklist. She emphasized that checklist promotes a cultural shift not just physical changes. She outlines steps including data collection, listening to residents/consumers, planning, implementation and progress evaluation. He talked about Walking block by block. MS. Kohn discussed progress on WHO checklist in varied cities/regions including DC, New York City and Portland. She discussed the pros/cons of having a scholastic leader and inherent political challenges. The DC effort is located in the executive office rather than Office on Aging, which Ms. Kohn recommends for influence and political capital. Ms. Kohn suggested fragmenting goals to make process manageable and identifying Age Friendly living as goal into local strategic plans. She suggested generating specific community involvement, incorporating the business community to capitalize on economic influence of older consumers. Ms. Kohn described DC's 10 task force committees broken down by 8 WHO domains plus 2 local (emergency preparedness and elder abuse, neglect and fraud). Ms. Kohn talked about DC budget (\$250,000 annually), importance of intergovernmental cooperation and issue that the planning department is outside structure of executive arm in Montgomery County. The DC needs assessment and more information is available at <http://dcoa.dc.gov/page/age-friendly-dc-initiative>.

Elinor Ginzler spoke next and discussed the AARP Livable Communities effort over last 15 years including prioritizing supportive community services and adequate mobility options that facilitate personal engagement of residents in civic and social life. She said 95% of seniors don't move and moves primarily occur to be near friends/family or because of health issues. Ms. Ginzler reviewed some findings that indicate that high community engagement contributes to higher life satisfaction. She also discussed the connection between a person's behavior and feelings of wellbeing. She emphasized the importance of listening and focusing on details when planning, citing example of Mo Co community that appeared to have good access and resources but where people were less satisfied than more rural areas of the county. Ms. Ginzler talked about the difficulty getting access to variety of people and avoiding listening repeatedly to the same people.

Rick Nelson spoke next, emphasizing first that there is not one solution and questioned if planners have really listened to local needs. He talked about affordability and resident's desire for county support because they are resistant to using their equity because they want to preserve it for their families. Mr. Nelson emphasized the importance of bridging the unique structure of Park and Planning Department and the Executive branch. He talked about the FY 15 collaboration between DHCA and the Planning Board on affordable housing near the Purple Line. Mr. Nelson said there is a housing needs assessment underway. He suggested that it is critical to get agreement between Parks and Planning and the Executive branch on a series of questions to be addressed during the master planning process. He emphasized the importance of having services in all types of housing for seniors.

He is an advocate for senior only housing especially in transit friendly areas. Mr. Nelson's recommendations included:

1. Establish a framework of senior issues in every plan to be addressed with or without proposed staff person/senior advocate
2. Locate proposed staff position in the Executive Office not Office on Aging
3. Ensure that the executive branch look more closely at all master plans in context of housing and senior services

Questions/issues from attendees included

1. Some people won't want to have change and will question what do we "offer" to facilitate change. Some people will oppose and consider change to be a problem

2. There is a bifurcated experience in Montgomery County, noting lower income/hidden poverty in Mont. County
3. Suggestion to recruit more middle aged members of the Commission on Aging to bridge interest groups
4. Noted a range of civic engagement opportunities down county vs. up county
5. Called for a coordinated effort between advocacy groups to really generate interest and vocalization of senior needs in the planning process for all projects
6. In response to request for clarification on WHO participation Ms. Kohn explained that WHO participation can be at local or regional level and is as simple as sending a local proclamation She said there are no stringent progress requirements and that progress is measured locally. WHO does offer feedback on progress in other localities
7. There was an articulated goal for integrating the WHO domains into the Senior Agenda to provide a roadmap and help fill in details for the Senior Agenda and an
8. Idea to coordinate with Village effort to capitalize of grass roots advocacy strength

Sally Shea
July 17, 2014

August 5, 2014 SESSION

The third and final session of the Planning Process Summer Study was held on July 31, 2014 at 401 Hungerford Drive, Rockville, Maryland. Chuck Kauffman, Chair of the Summer Study, thanked the invited guests and participants and introduced the moderator, Ken Hartman. Mr. Hartman introduced the invited guests, Rose Krasnow, Chuck Short, and Tedi Osias. Others in attendance included: Rick Nelson, Pat Brennan, Miriam Kelty, Arva Jackson, Jerry Morenoff, Syed Yusef, Jack Sprague, Isabelle Schoenfeld, DaCosta Mason, Sally Shea, Austin Heyman, Leslie Marks, Irene Hoskins and Odile Brunetto. Unlike the prior sessions, the final session used a roundtable format rather than a panel format.

After an overview of the prior sessions, the moderator opened the discussion on how Montgomery County measured up in senior engagement and the planning process. Demographics in the county indicate that some communities, such as Bethesda and Chevy Chase, have 65+ populations of more than 20%. As the county goes through the planning process, more and more the needs of older adults must be taken into account. While seniors want the same things in their communities as everyone else, there are some things about which seniors have particular concerns. Some of the particular concerns for seniors include, but are not limited to:

- Pedestrian crossings sufficient in number and safe for people with different levels and types of disabilities
- Green spaces and outdoor seating that are sufficient in number, well maintained and safe
- All areas and services are accessible by public transport with good connections
- Sufficient affordable housing is available in areas that are safe and close to services and the rest of the community.

For its part, the county has adopted the Senior Agenda in an effort to make the community more age-friendly. In addition, even though large numbers of seniors have not participated in the planning

hearings, the Planning Board is using technology to permit participation in the process without having to attend the hearings. The Board uses on-line surveys, email comments, twitter and video streaming to increase participation. Even so, the planning process remains a complex system to understand and navigate for most citizens and especially so for seniors.

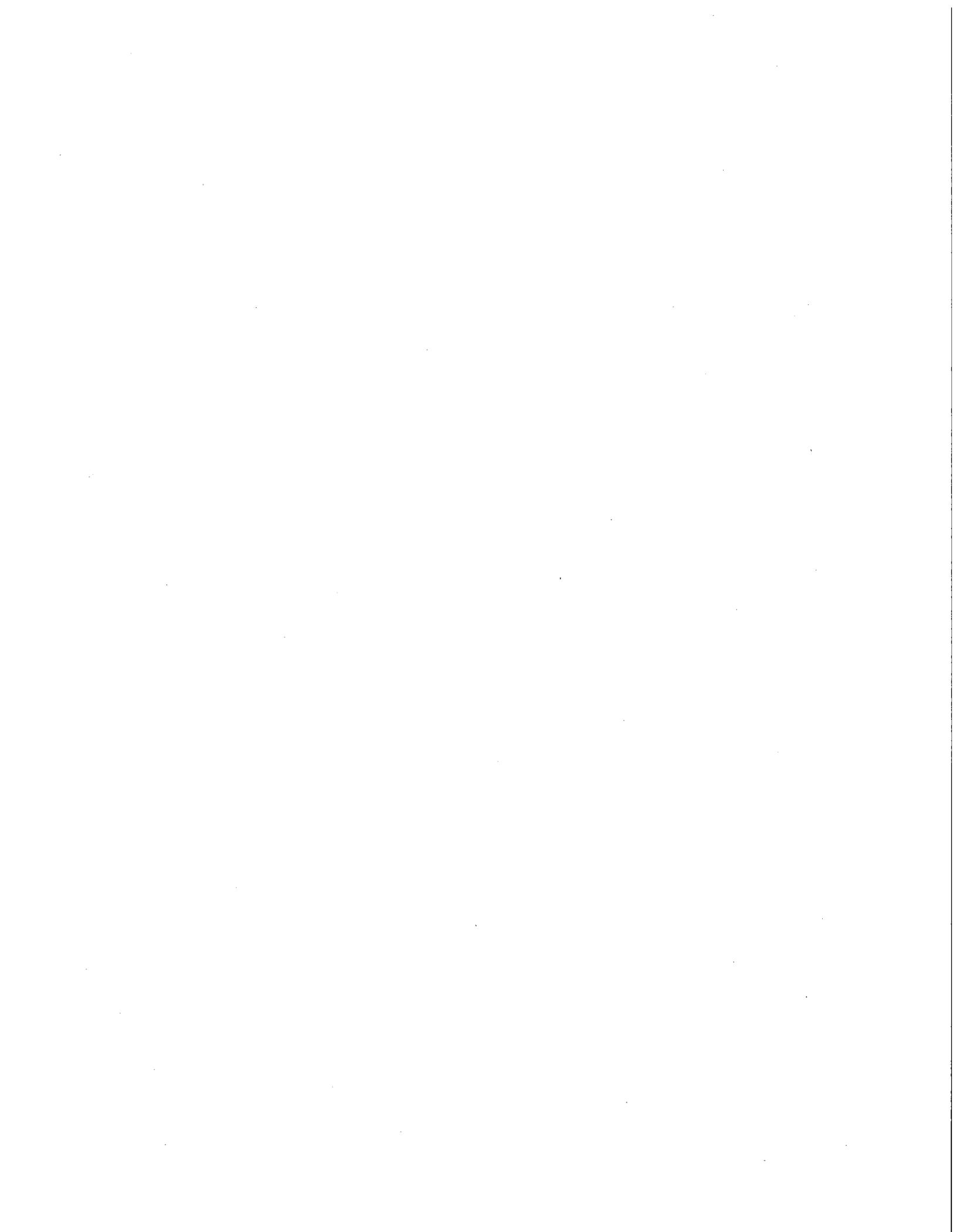
The planning process in the county is multifaceted and requires an understanding of all phases of the process. A number of governmental entities and agencies, as well as advocates and individuals are involved in the process. There is not only the need to understand the role of the Planning Board, County Council and the many administrative agencies involved in the process, but to recognize the difference between the Master Plan development process and the operational issues that fill-in the specific needs of the community.

With so much to understand, the following are suggestion on how seniors can have more impact on the planning process.

- Educating the community in an effort to develop and increase the number of advocates
- There is a need for more expertise on the needs of seniors among advocates and those in decision-making positions
- There is a need for more senior advocacy groups with relationships with other organizations in the community
- Data collection – should the county consider undertaking a needs assessment on senior issues (perhaps it is time to update the 2007 Towson University study on the needs of older adults)
- There should be a Seniors category in the Master Plan development or other parts of the planning process like there is for environment and child-care
- Development of agreed upon elements of an age-friendly community between County Executive, County Council and Planning Board – see the World Health Organization checklist, add more specificity in the Senior Agenda
- Recruit members of the Commission on Aging with specific expertise on issues such as planning, transportation, housing, and aging in place
- The Commission on Aging needs to create more partnerships and relationships with decision-makers, advocacy groups, community organizations and other change agents.

The moderator thanked the attendees for their ideas and participation and encouraged the Commission on Aging to continue its work to make Montgomery County a more age-friendly community.

A report will be written on the summer study with specific recommendation for the Commission on Aging. The report will be available on the Commission on Aging website in the fall.



5. SUMMER STUDY SESSIONS PARTICIPANTS

Dr. Odile Brunetto (Sessions 1,2,3)

Kenneth Hartman, Moderator (Sessions 1,2,3) (Section 7 – Biography)

A. COA COMMISSIONERS

Charles Kauffman, Chairman (Sessions 1, 2, 3)

Syed Yusuf (Sessions 1,2,3)

Miriam Kelty (Sessions 1,3)

Isabelle Schoenfeld (Session 1,2,3)

Jack Sprague (Session 1,3)

Sally Shea (Sessions 1,2,3)

DaCosta Mason (Sessions 2,3)

Reuben Rosenfeld (Sessions 1,2)

Jerry Morenoff (Session 1,2,3)

Arva Jackson (Session 2,3)

Judith Levy (Session 2)

B. GUEST PANELISTS – (Section 6 – Biographies)

Gwen Wright (Session 1)

Bob Kaufman (Session 1)

Ann Meade (Session 1)

Gail Kohn (Session 2)

Elinor Ginzler (Session 2)

Rick Nelson (Session 2,3)

Chuck Short (Session 3)

Rose Krasnow (Session 3)

Tedi Osias (Session3)

C. OTHER ATTENDEES

Leslie Marks (Sessions 1,2,3)

Austin Heyman (Sessions 1,2,3)

Mitch Markowitz (Sessions 1,2)

Robin Henoeh (Sessions 1,2)

Katherine McCallum (Session 2)

Stephanie Downey (Session 2)

Pat Brennan (Session 3)

Irene Hoskins (Session 3)

6. BIOGRAPHIES OF SPEAKERS

Odile Brunetto. Ed.D. March 2013

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Odile.brunetto@montgomerycountymd.gov

**Current Position: Director, Area Agency on Aging, Montgomery County,
Maryland , Department of Health and Human Services/Aging and Disability**

**From 1999 to 2008 ,Chief of Aging and Disability Services, Department of
Health and Human Services, Arlington County, Virginia**

**From 1988 to 1999, served in different managerial and professional
capacities, in Montgomery County, Maryland, with the Department of
Health and Human Services, Aging and Disability Services.**

**From 1984 to 1988, served in different professional and managerial
capacities in the Mental Retardation Office of the Fairfax -Falls Church
Community Services Board, Fairfax County, Virginia .**

**From 1979 to 1984, employed as a Teaching Assistant with the Special
Education Department of the George Washington University. Taught at the
graduate and undergraduate levels.**

Volunteer with Hospice of the National Capital Region 2005-2007

Graduate Leadership Arlington ,Class of 2006.

Volunteer with Leadership Arlington , 2007-2009

Graduate Senior Leadership Montgomery, May 2011

Board Member , Maryland Gerontological Association, 2011 to present

Board Member ,National Association Area Agencies on Aging, 2011 to

Immigrated to the United States in 1977.

**THE NEED TO ADVOCATE AND IMPLEMENT OLDER ADULT CONCERNS IN MONTGOMERY
COUNTY PLANNING**

Summer Study Report to the Commission on Aging

August 2014

**Kenneth Hartman, Director Bethesda-Chevy Chase Regional Services Center,
Moderator**

Ken Hartman was appointed Director of the Bethesda-Chevy Chase Regional Services Center, one of five satellite government centers in Montgomery County, in January 2008. The Centers are designed to bring direct services to the public and to enhance the link between citizens and government.

In this capacity, Mr. Hartman leads interagency efforts to improve services to the region; works closely with business and civic communities to address service needs; and oversees promotion and maintenance of downtown Bethesda. During his tenure, he has worked to promote community leadership; develop community-based partnerships that serve the needs of older adults; expand programs at the BCC Center; and build urban services in White Flint – all during a period of dwindling resources.

Mr. Hartman serves on boards of directors for several local non-profit organizations including Bethesda Urban Partnership, Glen Echo Park Partnership for Arts and Culture, and Bethesda Green.

Mr. Hartman began his career in local government 20 years ago as an aide to Montgomery County Councilmember Betty Ann Krahnke. Since that time, Mr. Hartman has served in a variety of high-profile positions for Montgomery County and the City of Rockville - as manager of project outreach for in the Rockville City Manager's office, legislative analyst for the Montgomery County Council, and five-years as chief of staff for former Montgomery County Councilmember Howard Denis.

Mr. Hartman holds a Master of Public Administration degree from Virginia Tech. He resides in Bethesda with his wife and two children.

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Gwen Wright, Director Montgomery County Planning Department

Since July 2013, Gwen Wright has been the Director of the Montgomery County Planning Department of the Maryland-National Capital Park and Planning Commission. In this role, Ms. Wright oversees a wide range of projects that aim to improve the quality of life in Montgomery County by conserving and enhancing the natural and built environment. Montgomery County is one of the largest jurisdictions in Maryland with over 1 million residents and has a key role in the dynamic Washington D.C. metropolitan growth area. Ms. Wright also worked for the Montgomery County Planning Department from 1987 to 2008. During this period, she served as the Chief of Countywide Planning, including supervising the Environmental Planning, Transportation Planning and Historic Preservation Sections, as well as serving as Acting Planning Director.

Prior to her appointment as the Montgomery County Planning Director in 2013, Ms. Wright was Chief of the Development Division for the City of Alexandria Department of Planning and Zoning for five years. In this position, she reviewed development proposals throughout the City of Alexandria and shepherded a wide variety of projects – from urban infill to major brownfields reclamation – through the regulatory process and implementation.

Ms. Wright began her career in Texas as the Director of Architectural Design and Redevelopment for the Galveston Historical Foundation in Galveston, Texas. She has degrees in Architecture and Architectural History from Yale University and has spoken at numerous national and regional conferences on a wide variety of planning issues.

Ms. Wright lives in the Cleveland Park neighborhood in Washington D.C., where she is co-chair of the Cleveland Park Historical Society Architectural Review Committee. She is a member of Lambda Alpha and a graduate of ULI Washington's Regional Leadership Institute.

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Anne Mead, Attorney



Anne Mead is a Partner at Linowes and Blocher LLP practicing in the areas of land use, real estate, municipal and other areas of administrative law, primarily in Montgomery County.

She regularly assists local, regional and national clients with legislative and regulation issues during all phases of the development process, including the planning, zoning, subdivision, detailed site plan, special exception (conditional use permit), zoning variance, licensing, administrative appeal and permitting processes. She also represents clients before the Maryland Courts on appellate matters.

Ms. Mead has served on numerous community, advisory and professional boards, including positions on Commercial Real Estate Women, the Greater Bethesda-Chevy Chase Chamber of Commerce, the Bethesda Urban Partnership and the Purple Line Master Plan Advisory Group. She participated in the Foreclosure Prevention Pro Bono project for the State of Maryland and was in the class of 2005 for Leadership Montgomery. She is also an adjunct professor at the Johns Hopkins Carey Business School in the Edward St. John Real Estate Program.

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**S. Robert Kaufman, Vice President MD National Capital Building Industry
Association (MNCBIA)**

September 2013

bkaufman@mncbia.org

Mr. Kaufman currently serves as Vice President for Government Affairs of the Maryland National Capital Building Industry Association. His responsibilities include Montgomery County Government Affairs, the Custom Builders Committee, the Development Process Review Committee and the Record Plat Committee. Bob supervises the Director of Government Affairs for Prince George's County and the Director of Regulatory Affairs. In 2011 and 2012, Bob served on the Land Use Subcommittee of the National Association of Homebuilders.

Prior to the MNCBIA, Bob served as Senior Vice President for Augustine Land responsible for all land acquisitions and land development and served on the Board of Directors for Augustine Homes LLC. Over the past 20 years, Mr. Kaufman worked on over 5000 acres of property resulting in over 6000 dwellings and 2 million square feet of commercial property including three golf courses communities. These communities have been recognized for their environmental sensitivity having won the Environmental Community of the Year awards in 2000, 2001 and 2002.

Mr. Kaufman served three terms as Vice President for the Maryland National Capital Building Industry Association (MNCBIA) and serves as a Life Director. Bob served on the Alexandria Affordable Housing Advisory Committee (Chair 2008-2009), the Smart Growth Alliance Conservation Committee, the Urban Land Institute Young Leaders Mentorships and the Urban Land Institute Urban Plan Committee. Past involvement also included the Board of Directors for the Center for Watershed Protection, the Tree Preservation Task Force and the Wetlands Conservation Task Force for the State of Maryland and the President's Council for Sustainable Development concerning the Chesapeake Bay. In 1994 Bob was sent to St. Petersburg Russia by USAID as part of a land use workshop with the University of Maryland. He currently serves on the Maryland Smart

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Growth Investment Fund Working Group under appointment by the Governor of Maryland. Known for his leadership on environmentally sensitive development, Bob is a frequent speaker on Land Use, Land Development, Green Building and Community Relations.

Prior to joining Augustine, Mr. Kaufman served as Vice President of the Michael T. Rose Consulting Company and the Michael T. Rose Land Company. Prior, Mr. Kaufman served as the Executive Vice President for the Economic Development Corporation for Prince George's County and as the Senior Economic Analyst for the Baltimore Economic Development Corporation and at the Mayor's Office of Manpower Resources.

Mr. Kaufman holds a Bachelor of Science Degree from the University of Maryland with a major in Government and Politics and minors in Business and Philosophy.

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Gail Kohn, Age-Friendly DC Coordinator

Gail Kohn is a nationally recognized leader in aging services who, since mid-2013, has been the Age-Friendly DC and Coordinator, mobilizing public and private resources to transform the city into a better place for residents to live, work play in accordance with World Health Organization guidelines. Until she joined DC government, Kohn was founding director of Capitol Hill Village, a grassroots neighborhood-based non-profit organized to sponsor social opportunities and coordinate whatever-it-takes to support members' intention to stay put, building the innovative organization into one of the most successful of its kind in the country. Previously Kohn was the founding CEO of Collington, a continuing care retirement community located in Mitchellville, Maryland. While leading Collington for 18 years, Kohn was one of other leaders who created and led mid-Atlantic and national education and long term care organizations to influence the quality of care for older adults.

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**Elinor Ginzler, Senior Director Center for Supportive Services, JCA-
GW**

Elinor Ginzler is currently the Senior Director of the Center for Supportive Services at the Jewish Council for the Aging of Greater Washington. With senior staff responsibility for an array of community based programs serving older adults, she oversees a medical adult day center, a social day program for adults with early stage memory loss, caregiver education, outreach and support, senior transportation services and mobility management programs.

Prior to her position with the JCA, Ms. Ginzler was with AARP for over 14 years, most recently as the Vice President for Health Portfolio, directing strategic planning and monitoring for AARP's integrated health work including advocacy, consumer education and outreach, programs, products and services. She also served as Senior Vice President for Livable Communities Strategies in AARP's Office of Social Impact, spearheading the association's work on housing, community services and mobility options.

Ms. Ginzler joined AARP in 1998, bringing with her more than 20 years of experience in program management and development at the national, state, and community levels and experience working collaboratively with public, private, non-profit and community-based organizations.

Ms. Ginzler has been a lead spokesperson at AARP on housing, health and long term care, older driver safety, mobility options, and caregiving. She has been featured on national industry and consumer news outlets including *The Today Show*, *The Wall Street Journal* and *National Public Radio*. In addition, she is co-author with Hugh Delehanty of *Caring for Your Parents – The Complete Family Guide*, published by Sterling Publishing.

Ms. Ginzler holds a BA from the University of Pennsylvania and completed her graduate studies at the University of Maryland.

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**RICHARD Y. NELSON, JR., Director of the Montgomery County Department
of Housing and Community Affairs**

Mr. Nelson is the Director of the Department of Housing and Community Affairs of Montgomery County. The department's responsibilities include the Community Development Block Grant program, housing code enforcement, landlord and tenant affairs, the county affordable housing trust fund, and the county's Moderately Priced Dwelling Unit Program.

Mr. Nelson has also been a Senior Fellow at the University of Maryland, School of Public Policy. In this capacity, Mr. Nelson was an instructor in the University's established graduate level housing and community development program.

Mr. Nelson has also served as a Commissioner of the Montgomery County Housing Opportunities Commission from 1991 until 2007, where he was the Chair of the Commission for four years. He was also employed by The National Association of Housing and Redevelopment Officials (NAHRO) where he served as Executive Director from 1987 until 2001. He started his career in housing at the Department of Housing and Urban Development's (HUD) Philadelphia Regional Office.

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Rose Krasnow, Deputy Director of the Montgomery Planning Department

Rose Krasnow is the Deputy Director of the Montgomery Planning Department at the Maryland National Capital Park & Planning Commission, where she has worked since 2004. Prior to assuming her current position, Rose served as the Acting Director, as Chief of Area 1 where she oversaw both regulatory and Master Plans, and as Chief of Development Review, where she managed the review of Project, Subdivision and Site Plans as well as rezoning applications and special exceptions.

Prior to her work at the Planning Commission, Rose served two terms on the Rockville City Council and three terms as Mayor of Rockville. In that capacity, she was instrumental in bringing about the redevelopment of downtown Rockville and also approved two major neo-traditional communities – King Farm and Fallsgrove. She also started the City's first non-profit economic development corporation – now known as REDI.

Rose spent four years working as a Government Bond Trader for Oppenheimer & Co. in New York City and two years as a Smart Growth Policy Analyst with the National Governors Association. She is married and has two children, now grown.

Rose received a Bachelor's Degree in Political Science from Washington University in St. Louis and a Master's in Urban and Regional Planning from the University of North Carolina in Chapel Hill.

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Charles L. Short, Special Assistant to County Executive Ike Leggett

Charles L. Short

cshort5@verizon.net

Professional Summary

Forty years of experience leading and administering local government and private nonprofit human service programs including nearly twenty years (1983-2002) as the Director of the principal health and human service agency of the Montgomery County, Maryland (pop. 930,000) government entailing leadership of 1,500 employees, 450 purchase of service contracts and an annual budget of 185 million dollars.

2006 to the present, Special Assistant to Montgomery County, MD. Executive Ike Leggett, advising the County Executive on a broad range of fiscal, social, political and legislative matters.

1996 to the present, adjunct professor at the University of Maryland Graduate School of Public Policy.

2002-2006, Secretary for Justice and Service, Archdiocese of Washington, D.C., appointed by Washington Archbishop Theodore Cardinal McCarrick. The Secretary oversees the Archdiocese's social concerns efforts which include non-profit direct service agencies, parish based programs, local, state and national legislative and policy advocacy, community organization and policy and program development. The Archdiocese is comprised of 144 parishes in the District of Columbia and the Maryland counties of Montgomery, Prince Georges, Charles, Calvert and St. Mary's.

Previous Positions

Secretary for Justice and Service, Archdiocese of Washington, 2002-2006

Director, Department of Health and Human Services, Montgomery County, MD, 1995-2002

Director, Department of Family Resources, Montgomery County, MD, 1983-95

Chief, Division on Children and Youth, Montgomery County, MD 1973-83

Teacher, Middle School, Holy Trinity School, Washington DC, 1969-73

Group Home Counselor, Boys and Girls Homes, Inc., 1970-73

Significant Community Activities

Presently: Chairman of the Board of Directors, St Ann's Infant and Maternity Center, Hyattsville, MD.; Chairman, Board of Advisors, The Little Sisters of the Poor Elderly Residences, Washington, D.C.; Langley Park, MD. Parish Partnership; columnist for County-wide Catholic newspaper, Our Parish Times

Recent Past Service: Board of Directors, The Ivymount School; Board of Directors, United Way of the National Capital Area; Board of Directors, The Non Profit Village, Inc.;

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Chairman, Archdiocese of Washington Pastoral Council; Board of Directors, Leadership Montgomery; Administrative Board of the Maryland Catholic Conference, Founding Chairman, Montgomery County Collaboration Council for Children Youth and Families.

Significant Recognitions

Peacemaker of the Year 2012, Conflict Resolution Center; Founders Award of The Foundation Schools, 2006; Outstanding Service Award, Montgomery County Regional United Way Council, 2005; The Community Ministries of Montgomery County Distinguished Service Award, 2002; The Spanish Catholic Center Miriam Aramas Award for Service, 2002; National Association of County Human Services Administrators Director's Award for Individual Achievement, 2001, Two time recipient of the Msg. Geno Baroni Advocacy Award, Catholic Charities of Washington, DC, 1988 and 2001; The 1997 Distinguished Citizen of the Year Award, The Maryland Association of Non-Public Special Education Facilities; Lehrman-Pikser Award, Jewish Social Service Agency of Greater Washington, 1992; Outstanding Community Service Award; Leadership in Diversity Award, African American Employees Association, 2000; City of Rockville, Maryland, Michael Taff Award for Human Relations, 1997; Outstanding Service Award, Montgomery County Commission for Persons with Disabilities, 1989; Outstanding Service to the Homeless Award, Maryland Governor's Advisory Board on Homelessness, 1989. Inducted to High School Athletic Hall of Fame, 2014.

Educational Background

B.A. Georgetown University, Washington, D.C. 1971

M.A. The Catholic University of America, Washington, D.C. 1974

Leadership Montgomery, 1990

Fellow, The Academy for Excellence in Local Governance,
University of Maryland, 2001

Personal

Married to Maureen O'Donnell Short, three children; resides in Rockville, MD

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Tedi S. Osias, Senior policy advisor to Council Member Nancy Floreen

Tedi S. Osias is a senior policy advisor to Montgomery County Council Member Nancy Floreen, focusing on land use planning, zoning and housing issues. Prior to her current position, Ms. Osias worked at the Housing Opportunities Commission as the Director of Legislative and Public Affairs.

Ms. Osias formerly served as chief of staff to County Council member Howard A. Denis and as the Executive Director of the Montgomery County Board of Appeals. Earlier in her career Ms. Osias was a program analyst in the Office of Legislative Oversight, a county land use and transportation planner and legislative aide to then-Delegate Nancy Kopp. Among her community activities, Ms. Osias served as an independent member of the Commission for Women and is a graduate and former board member of Leadership Montgomery. She is presently Chair of Montgomery Women.

Ms. Osias holds a B.A. and an M.A. in History from Washington University in St. Louis and an M.P.A. from Harvard's Kennedy School of Government

7A. SUMMER STUDY PROPOSAL

THE NEED FOR AN ADVOCATE FOR OLDER ADULT CONCERNS ON THE MONTGOMERY COUNTY PLANNING BOARD

*Committees Submitting Proposal:

Communications

Aging in Place

Public Policy

(*Requests pending)

ISSUE

Montgomery County's older adult population represents approximately XXX% of the County's citizens. Despite this formative representation and continued growth pattern, the County's older adults lack adequate representation on the County's Park and Planning Board. The needs of older adults pertaining to the use of land, zoning, transportation, schools, parks, libraries, fire and police stations, housing, historic preservation, pedestrian and trail systems and environmental issues are receiving minimum attention relative to other sectors of the County's population. In general, they are lacking the resources and professional representation that developers and other groups with special interests bring to the table.

Each community within Montgomery County has a Master Plan that establishes a comprehensive view of land use and future development. A list of these communities is attached. Montgomery County's older adult residents require a dedicated, knowledgeable, skilled older adult representative on the five member County's Park and Planning Board to act as their advocate. This individual would participate in drafting of master plans, reviewing applications for development and analyzing information to help public officials plan for the future.

This older adult representative on the Board would be nominated by the Commission on Aging, confirmed by the County Executive and appointed by the County Council, in the same manner as other members of the Planning Board.

ANTICIPATED OUTCOME

A strong recommendation from the COA leading to the appointment of a high-level staff member to function as Older Adult Representative to the Montgomery County Park and Planning Board and make recommendations to Board Members in preparing, reviewing and considering approval of master plans, preliminary plans, site plans and other development applications; advising the Council on changes to the zoning; making recommendations to the Board of Appeals on applications for special exceptions and variances; advising local, state and federal agencies on their constructions projects in Montgomery County, reviewing and approving park plans and undertaking such other matters as are normally undertaken by other representatives of the Board.

THE CONDUCT OF THE SUMMER STUDY: (REVISED)

SESSION

1. Interview key members of the planning board: understand the board's composition, its legal basis and the appointment process; assess the role of developers, county departments, land use attorneys and the branches of the County government.
2. Interview senior planners in order to develop a checklist of senior essentials. Define the job of a senior representative (and make clear that there may be conflict resolution processes in which said representative will participate)
3. Interview members of the Committee of the County Council (PHED Committee) and representatives of the County Executive to determine best legal way to obtain high level staff representation on the Planning Board.

REPORT

A realistic and achievable recommendation for permanent senior representation at all stages of the planning process in order to achieve the incorporation of maximum benefits for seniors in pending and future County developments.

Commissioner presenting proposal:

CHARLES KAUFFMAN

7B. The Senior Agenda

Montgomery County will be a community for a lifetime, a place for older adults to live safe, healthy and vital lives.
Adopted by the Montgomery County Council - December 2012

Commitment to Older Adults:

- The County will have a policy against ageism, including age stereotyping.
- Older adults are a valuable economic, cultural, and social resource and will be included in all County planning activities at the Executive and Council levels.
- Planning related to older adults will include consideration of diversity, inclusiveness, and intergenerational elements.
- Demographic data about older adults will be maintained, analyzed, and incorporated into planning.
- Resource information relevant to older adults will be distributed and accessible.
- The County will have a plan to address options for aging in place and alternatives.
- The County will promote public-private partnerships that contribute to implementation of this Agenda.

Transportation

Vision: *Montgomery County will have public and private transportation and mobility systems that enable older adults to go where they want to go, when they want to go and how they want to get there.*

- Affordable senior transportation will be a priority.
- Planning will include in-neighborhood options to make transportation accessible and to make affordable escorted transportation available.
- Planning will encompass the needs and safety of both pedestrians and those who do not drive.
- Transportation planning will include a focus on the needs of older adults as they become less able to drive.

Housing

Vision: *Montgomery County will promote choices of dwelling types so that as the needs and preferences of older adults change, they can age in place, downsize, choose rental or ownership, or find housing with the appropriate level of supportive services without having to leave the community.*

- Affordable senior housing will be promoted and made available.
- Housing options and alternatives will be part of County planning efforts.
- Visitable and livable options will be included in County planning.
- New and existing construction and redevelopment will consider the needs of both current and prospective older residents.
- The County will assist and encourage efforts to create supportive communities such as villages, co-housing and other options.
- Redevelopment planning will encourage walkable communities.
- Planning efforts will include public-private partnerships as an option to providing housing suitable for older adults.

Socialization and Leisure

Vision: *Montgomery County will encourage and support vital living of older adults by providing opportunities for physical, mental and social interaction.*

- Recreation programs will facilitate socialization and other activities that integrate health and wellness.
- Recreation programs will be available and easily accessible to older adults throughout the County, particularly in areas where there are no senior centers.
- Lifelong learning opportunities will be available.
- Libraries will be a location of activities and resources for older adults.
- Active efforts will be made to engage older adults as volunteers.

Health and Wellness

Vision: *Montgomery County will expand public health and prevention programs that promote physical, mental, social and environmental health for older adults.*

- Healthcare providers will be encouraged to accept private and public health insurance including Medicare and Medicaid.
- Medical care for older adults will be available, accessible, and affordable.
- Direct services and educational programs to plan for serious illness and to manage chronic diseases including promotion of self-management programs will be a priority.
- Access to hearing and dental care will be available.
- Nutrition support including education and meals will be provided.
- Specialized mental health care will be available as an integral part of the health services delivery system.
- Caregiver support will be a priority.
- Services to address cognitive impairment will be available, accessible and affordable for affected older adults and their families and caregivers.

Vision: *Montgomery County will distribute and publicize recognizable, understandable, timely, and accessible information on County and public resources and services for older adults.*

- Information will be understandable and accessible by older adults and their caregivers in diverse ethnic population groups
- Information will clearly state who is eligible for services at no cost and who is eligible at specified costs.
- Information for older adults will be branded uniformly for consistency and recognizable identification
- The County will use and publicize multiple media to disseminate information relevant to older adults, including social media, its regularly updated website and a 24/7 information resource line.

Employment

Vision: *Montgomery County will recognize the extent and value of the contribution of older adults to the economy.*

- The County will encourage County agencies and private companies to offer employment opportunities as older adults transition to retirement.
- The County will provide information that promotes the value of older workers.
- The County will encourage job fairs, partnerships, and forums to help older adults prepare themselves to continue in or reenter the workforce and find jobs.

Security and Safety

Vision: *Montgomery County will provide physical, financial, and technological protection and safety for older adults.*

- The County will expand its police and fire safety programs targeted toward older adults.
- The County will educate both older adults and their caregivers about the potential for financial crimes, including telephone and computer scams.
- The County's Ombudsman Program will increase its monitoring of the safety of group homes and assisted living facilities.
- The County will work to assure legal protection from financial exploitation of older adults.





Checklist of Essential Features of Age-friendly Cities

This checklist of essential age-friendly city features is based on the results of the WHO Global Age-Friendly Cities project consultation in 33 cities in 22 countries. The checklist is a tool for a city's self-assessment and a map for charting progress. More detailed checklists of age-friendly city features are to be found in the WHO Global Age-Friendly Cities Guide.

This checklist is intended to be used by individuals and groups interested in making their city more age-friendly. For the checklist to be effective, older people must be involved as full partners. In assessing a city's strengths and deficiencies, older people will describe how the checklist of features matches their own experience of the city's positive characteristics and barriers. They should play a role in suggesting changes and in implementing and monitoring improvements.

Outdoor spaces and buildings

- Public areas are clean and pleasant.
- Green spaces and outdoor seating are sufficient in number, well-maintained and safe.
- Pavements are well-maintained, free of obstructions and reserved for pedestrians.
- Pavements are non-slip, are wide enough for wheelchairs and have dropped curbs to road level.
- Pedestrian crossings are sufficient in number and safe for people with different levels and types of disability, with non-slip markings, visual and audio cues and adequate crossing times.
- Drivers give way to pedestrians at intersections and pedestrian crossings.
- Cycle paths are separate from pavements and other pedestrian walkways.
- Outdoor safety is promoted by good street lighting, police patrols and community education.

- Services are situated together and are accessible.
- Special customer service arrangements are provided, such as separate queues or service counters for older people.
- Buildings are well-signed outside and inside, with sufficient seating and toilets, accessible elevators, ramps, railings and stairs, and non-slip floors.
- Public toilets outdoors and indoors are sufficient in number, clean, well-maintained and accessible.

Transportation

- Public transportation costs are consistent, clearly displayed and affordable.
- Public transportation is reliable and frequent, including at night and on weekends and holidays.
- All city areas and services are accessible by public transport, with good connections and well-marked routes and vehicles.

- Vehicles are clean, well-maintained, accessible, not overcrowded and have priority seating that is respected.
- Specialized transportation is available for disabled people.
- Drivers stop at designated stops and beside the curb to facilitate boarding and wait for passengers to be seated before driving off.
- Transport stops and stations are conveniently located, accessible, safe, clean, well-lit and well-marked, with adequate seating and shelter.
- Complete and accessible information is provided to users about routes, schedules and special needs facilities.
- A voluntary transport service is available where public transportation is too limited.
- Taxis are accessible and affordable, and drivers are courteous and helpful.
- Roads are well-maintained, with covered drains and good lighting.
- Traffic flow is well-regulated.
- Roadways are free of obstructions that block drivers' vision.
- Traffic signs and intersections are visible and well-placed.
- Driver education and refresher courses are promoted for all drivers.
- Parking and drop-off areas are safe, sufficient in number and conveniently located.
- Priority parking and drop-off spots for people with special needs are available and respected.

Housing

- Sufficient, affordable housing is available in areas that are safe and close to services and the rest of the community.
- Sufficient and affordable home maintenance and support services are available.
- Housing is well-constructed and provides safe and comfortable shelter from the weather.
- Interior spaces and level surfaces allow freedom of movement in all rooms and passageways.
- Home modification options and supplies are available and affordable, and providers understand the needs of older people.
- Public and commercial rental housing is clean, well-maintained and safe.
- Sufficient and affordable housing for frail and disabled older people, with appropriate services, is provided locally.

Social participation

- Venues for events and activities are conveniently located, accessible, well-lit and easily reached by public transport.
- Events are held at times convenient for older people.
- Activities and events can be attended alone or with a companion.
- Activities and attractions are affordable, with no hidden or additional participation costs.

- Good information about activities and events is provided, including details about accessibility of facilities and transportation options for older people.
- A wide variety of activities is offered to appeal to a diverse population of older people.
- Gatherings including older people are held in various local community spots, such as recreation centres, schools, libraries, community centres and parks.
- There is consistent outreach to include people at risk of social isolation.

Respect and social inclusion

- Older people are regularly consulted by public, voluntary and commercial services on how to serve them better.
- Services and products to suit varying needs and preferences are provided by public and commercial services.
- Service staff are courteous and helpful.
- Older people are visible in the media, and are depicted positively and without stereotyping.
- Community-wide settings, activities and events attract all generations by accommodating age-specific needs and preferences.
- Older people are specifically included in community activities for "families".
- Schools provide opportunities to learn about ageing and older people, and involve older people in school activities.

- Older people are recognized by the community for their past as well as their present contributions.
- Older people who are less well-off have good access to public, voluntary and private services.

Civic participation and employment

- A range of flexible options for older volunteers is available, with training, recognition, guidance and compensation for personal costs.
- The qualities of older employees are well-promoted.
- A range of flexible and appropriately paid opportunities for older people to work is promoted.
- Discrimination on the basis of age alone is forbidden in the hiring, retention, promotion and training of employees.
- Workplaces are adapted to meet the needs of disabled people.
- Self-employment options for older people are promoted and supported.
- Training in post-retirement options is provided for older workers.
- Decision-making bodies in public, private and voluntary sectors encourage and facilitate membership of older people.

Communication and information

- A basic, effective communication system reaches community residents of all ages.
- Regular and widespread distribution of information is assured and a coordinated, centralized access is provided.

- Regular information and broadcasts of interest to older people are offered.
- Oral communication accessible to older people is promoted.
- People at risk of social isolation get one-to-one information from trusted individuals.
- Public and commercial services provide friendly, person-to-person service on request.
- Printed information – including official forms, television captions and text on visual displays – has large lettering and the main ideas are shown by clear headings and bold-face type.
- Print and spoken communication uses simple, familiar words in short, straightforward sentences.
- Telephone answering services give instructions slowly and clearly and tell callers how to repeat the message at any time.
- Electronic equipment, such as mobile telephones, radios, televisions, and bank and ticket machines, has large buttons and big lettering.
- There is wide public access to computers and the Internet, at no or minimal charge, in public places such as government offices, community centres and libraries.

Community and health services

- An adequate range of health and community support services is offered for promoting, maintaining and restoring health.
- Home care services include health and personal care and housekeeping.
- Health and social services are conveniently located and accessible by all means of transport.
- Residential care facilities and designated older people's housing are located close to services and the rest of the community.
- Health and community service facilities are safely constructed and fully accessible.
- Clear and accessible information is provided about health and social services for older people.
- Delivery of services is coordinated and administratively simple.
- All staff are respectful, helpful and trained to serve older people.
- Economic barriers impeding access to health and community support services are minimized.
- Voluntary services by people of all ages are encouraged and supported.
- There are sufficient and accessible burial sites.
- Community emergency planning takes into account the vulnerabilities and capacities of older people.

7E. SELECTED COMMENTS

(From Gwen Wright, MC Planning Department)

Chuck,

Sorry for the delayed response. We have approximately 144 staff in the Planning Department. We are organized into 8 divisions.

Three are geographically based: Area 1 (inside the Beltway), Area 2 (along the I-270 Corridor), and Area 3 (the rest of the County). Each of these three divisions include staff who do both master planning and review of regulatory applications in the specific geographic area.

Two are more administrative divisions that serve the whole Department: Management Services and IT.

The remaining divisions are: Research and Special Projects (including staff who do demographic research, housing, and economic analysis), Functional Planning and Policy (including transportation, environmental, zoning, and historic preservation staff who deal with Countywide issues), and Development and Regulatory Coordination (who do intake and processing of regulatory applications and administration of forest conservation issues.)

Staff within the Department have many different types of expertise – planners, GIS experts, transportation modelers, urban designers, architects, landscape architects, economists, demographers, arborists, etc.

(from Councilmember Nancy Floreen)

Folks - I appreciate your interest in these issues. My review of the WHO age friendly checklist suggests that their items are largely operational. In light of this fact, a focus on a complex planning and development process (not operational) already top heavy with multiple agency players, and already focused on inclusion of community participants, (a very large percentage of which are seniors) does not seem that productive. Actually, county efforts are currently focused on streamlining those processes, not broadening them. I would encourage you to focus on service delivery to seniors in the WHO checklist context.

**Best,
Councilmember Nancy Floreen**

Sent from my iPad

(from Austin Heyman, Senior Fellow, Office of Community Partnerships)

On Jul 27, 2014, at 7:44 PM, "Austin Heyman" <aheygemini@verizon.net> wrote:

Chuck... I believe it would be appropriate for the study group and finally the Commission itself to consider the relationship between the WHO age-friendly checklist and the Senior Agenda. I believe that the Commission is planning to focus on next steps to be taken regarding the agenda and it seems to me that the WHO list might be useful in that regard and also for each of the Sub-Cabinet workgroups.

Austin