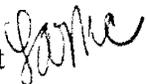


MEMORANDUM

September 22, 2015

TO: Health and Human Services Committee

FROM: Linda McMillan, Senior Legislative Analyst 

SUBJECT: **Discussion and Update: World Health Organization's "Age-Friendly Cities" or "Age-Friendly Communities"**

Expected for this session:

Uma Ahluwalia, Director, Department of Health and Human Services (DHHS)
Dr. John Kenney, Chief, DHHS Aging and Disability Services
Odile Brunetto, Director, Area Office on Aging, Department of Health and Human Services
Judith Levy, Chair, Commission on Aging
Charles Kauffman, member of the Commission on Aging speaking as an individual

On January 15, 2015, the HHS Committee discussed the Commission on Aging's recommendation that Montgomery County pursue designation as an "Age-Friendly City" or "Age-Friendly Community" in accordance with the World Health Organization's (WHO) Age-Friendly Cities project.

At this session, the Committee will first receive an update from Director Ahluwalia, followed by comments from Ms. Levy on behalf of the Commission on Aging and from Mr. Kauffman as an individual. Each has provided written comments that are attached to this memo.

Attached at © 1-8 is the update from DHHS Director Ahluwalia. Some points included in the memo are:

- AARP is the WHO affiliate in the United States for Age-Friendly Community designation. Communities can apply directly to WHO or AARP or both organizations. While the process is similar, there are some differences, with AARP proscribing a two-year period for assessment and development of an Action Plan and requiring a five year progress report.

- DHHS is engaged with AARP to determine how the work the County has already done will be evaluated and how it could impact the timetable for designation.
- Development of an Action Plan and implementation of the Plan will require resources. (No estimate is included in the memo.)
- The table included at © 3-4 compares WHO requirements and AARP requirements. Both require an assessment of a community's age-friendliness in 8 domains. The Action Plan is based on this assessment. The 8 domains are:
 1. Outdoor Spaces and Buildings - accessibility to and availability of safe recreational facilities.
 2. Transportation - safe and affordable modes of private and public transportation.
 3. Housing - wide range of housing options for older residents, aging in place, and other home modification programs.
 4. Social Participation - access to leisure and cultural activities and opportunities for older residents to participate in social and civic engagement with their peers and younger people.
 5. Respect and Social Inclusion - programs to support and promote ethnic and cultural diversity, along with programs to encourage multigenerational interaction and dialogue.
 6. Civic Participation and Employment - promotion of paid work and volunteer activities for older residents and opportunities to engage in formulation of policies relevant to their lives.
 7. Communication and Information - promotion of and access to the use of technology to keep older residents connected to their community and friends and family, both near and far.
 8. Community Support and Health Services - access to homecare services, clinics, and programs to promote wellness and active aging.
- Circle 7 presents a summary of Montgomery County's efforts to understand the need of Montgomery County seniors. Circle 8 highlights the upcoming Summit on Aging in Montgomery County that will be held on December 3rd.

Attached at © 9-11 is information from the Commission on Aging on the 2015 Summer Study on "Commonalities and Differences in Localities' Approaches for Aging in Community." The study group met with representatives of seven localities participating in the Age-Friendly Communities certification program. The Commission has six recommendations:

1. Create a new high-level manager, or repurpose a high level manager position, to be located in the County Executive's Office that would be solely devoted to the Age Friendly/Livable Communities program. The manager would coordinate with the Commission on Aging, the Senior Subcabinet, M-NCPPC, Executive Departments, County Council and other key groups and stakeholders.

2. Alternatively, due to the current budget shortfall, establish a Senior Fellow position in the County Executive's Office to fulfill some of the manager's roles and responsibilities.
3. Create an Age Friendly/Livable Communities Advisory Board.
4. Enhance the collaboration among the Senior Subcabinet departments and with M-NCPPC for a more integrated approach.
5. The Commission on Aging should coordinate closely with the manager and have a seat on the Advisory Board.
6. The Commission on Aging should continue to advocate for inclusion of a "senior" section in all Master Plans and Sector Plans.

Attached at © 12-13 are comments from Mr. Kauffman, who addressed the Committee in January as the Chair of the Commission's summer study on "the Need to Improve Advocacy for Older Adults in Montgomery County Planning." Mr. Kaufmann notes that "Age-Friendly" is intergenerational and affects every facet of life in the County. He recommends the following to expedite the Age Friendly Program:

1. Appoint an Executive Director for the Age Friendly Program.
2. Appoint the Director to be the co-chair of the Senior Sub-Cabinet.
3. Empower the Senior Sub-Cabinet as the umbrella organization for directing and coordinating Age Friendly related activities to assure prompt response from departments.
4. Age Friendly proposals must be merged in Sector and Master Plans.
5. Establish and reinforce the branding and marketing of "Age Friendly Montgomery."
6. The new Economic Development Group should join the Sub-Cabinet and be engaged in development and outreach.
7. Assign a senior County Council staff member as a liaison to assure consistency, cooperation, and success.



DEPARTMENT OF HEALTH AND HUMAN SERVICES

Isiah Leggett
County Executive

Uma S. Ahluwalia
Director

MEMORANDUM

September 18, 2015

TO: George Leventhal, President, Montgomery County Council

FROM: Uma S. Ahluwalia, Director *Uma*

SUBJECT: World Health Organization/AARP Age-Friendly Cities and Communities

This memorandum is a response to your request for information regarding the World Health Organization (WHO) designation for Age Friendly Communities and is being sent in preparation for our briefing to the Health and Human Services Committee on September 24th. Over the past few months, we have met with AARP staff, as AARP is the institution affiliate for the WHO initiative in the United States. Also, the Commission on Aging (COA) conducted a thorough summer study on Age Friendly Communities. The Commission's report and recommendations are expected in October.

Communities can apply directly to the WHO or can do so through the AARP network. Currently, sixty communities in our nation have enrolled in the AARP/WHO program and nine have submitted their implementation plan. It appears that those communities that have applied more recently applied for both the WHO independent designation and the AARP designation. As you will see on the attached comparison of WHO and AARP processes, the criteria are quite similar and complementary. (The primary difference in the two approaches is that the AARP process proscribes a two-year period to conduct an assessment and develop an Action Plan whereas the WHO does not. Both processes require development of a three-year Action Plan and ongoing measurement of progress—AARP being more prescriptive in requiring submission of a five-year progress report.) There is no fee for submitting an application.

The age-friendliness of the eight domains to be considered (outdoor spaces and building, transportation, housing, social participation, respect and social inclusion, civic participation and employment, communication and information, and community support and health services) are for the most part aligned with the domains comprising the work of the Senior Subcabinet and the Senior Agenda.

Office of the Director

401 Hungerford Drive • Rockville, Maryland 20850 • 240-777-1275 • FAX 240-777-1494 • MD Relay 711
www.montgomerycountymd.gov/hhs



George Leventhal, President, Montgomery County Council
September 18, 2015
Page 2

We have met and had follow-up conversations with Ms. Jeanne Anthony, AARP Senior Project Manager, Age-Friendly Communities Initiative, to discuss how our previous efforts and accomplishments toward making Montgomery County an age-friendly community would be evaluated according to their schema and proscribed timetable for earning the designation. Ms. Anthony applauds our work to date in this area (e.g., establishment of the Senior Sub-cabinet, the 2008 Senior Summit, endorsement of the "*Senior Agenda: A Community for a Lifetime*," and our efforts to enhance the quality of life of all seniors as reflected in our annual Senior Budget Initiatives) and conveyed that this work clearly demonstrates our commitment to WHO/AARP age-friendly goals. She is eager to learn how we engage our residents in shaping the agenda for the December 3, 2015 "Summit on Aging in Montgomery County" and the strategic plan developed to address the concerns and aspirations expressed by our seniors in focus groups, surveys and the actual proceedings of the 2015 Summit.

We are confident that our previous and current work will position the County favorably towards the WHO/AARP Age-Friendly designation. Of course, the development of a three-year Action Plan will require resources as well as its implementation overtime.

We look forward to our upcoming discussion on September 24th.

USA:gh

Attachment: WHO/AARP Chart Survey

c: Bonnie A. Kirkland, Assistant Chief Administrative Officer

	WHO Network of Age Friendly Communities	AARP Network of Age Friendly Communities
Application timing	<u>Applications to join the WHO Global Network of Age-Friendly Cities and Communities</u> are processed quarterly in February, May, August and November, not on a rolling basis. You will receive an automatic confirmation of your city or community's application upon submission.	No timing specified.
Application/ Selection Criteria / Commitment	<p>Application:</p> <ol style="list-style-type: none"> 1. Complete online application form 2. Attach letter from Mayor and municipal administration indicating their commitment to the Network cycle of continual improvement 3. Commence Network cycle of four steps outlined below: <ol style="list-style-type: none"> a. Establishment of mechanisms to involve older people throughout the Age-friendly Cities and Communities cycle Cities and communities are also encouraged to build partnerships with government and civil society (including NGOs and academic institutions). b. Development of a baseline assessment of the age-friendliness of the city/community <u>Note:</u> This assessment can be flexible to take into account the diversity of cities and communities, however at a minimum, it needs to consider each of the eight domains identified in the WHO Age-friendly Cities Guide available at: <u>Global Age-friendly Cities: A Guide</u> (i.e., outdoor spaces and buildings, transportation, housing, social participation, respect and social inclusion, civic participation and employment, communication and information, community support and health services) c. Development of a 3-year city-wide action plan based on the findings of this assessment If possible, the plan will link to other municipal instruments to ensure that 	<p>Selection Criteria:</p> <p>Communities interested in joining the network are encouraged to contact their state AARP office. <u>To determine whether a particular community should begin the process of joining the network, AARP State Office staff will consider a variety of factors related to a community's leadership and overall readiness, e.g.,</u></p> <ul style="list-style-type: none"> - political acceptance - community involvement - elected official concern - NGO/grassroots champions - grant recipient - master plan/lanes for bike/ped - acknowledged need for economic development - ped/traffic safety concerns - Safe Routes to Schools pot'l - Sizeable 50+ population - Acknowledgement of infrastructure issues - Known walkability problems - Acknowledged need for traffic calming - Community recognizes it's underutilizing assets (e.g., trails, parks, centers, facilities) - Local colleges/univ present but not fully integrated into community - Health issues, e.g., obesity/diabetes, low physical activity, poor nutrition, food deserts)

3

	<p>age-friendliness becomes a core responsibility for all municipal departments.</p> <p>d. Identification of indicators to monitor progress against this plan.</p>	<ul style="list-style-type: none"> - Safety and security issues - New development opportunities in the works
Requirements and Commitments	<p>WHO Age Friendly Network members commit to a four step cycle:</p> <ol style="list-style-type: none"> 1. Establishment of mechanisms to involve older people throughout the Age-friendly Cities and Communities cycle Cities and communities are also encouraged to build partnerships with government and civil society (including NGOs and academic institutions). 2. Development of a baseline assessment of the age-friendliness of the city/community <u>Note:</u> This assessment can be flexible to take into account the diversity of cities and communities, however at a minimum, it needs to consider each of the eight domains identified in the WHO Age-friendly Cities Guide available at: Global Age-friendly Cities: A Guide <ol style="list-style-type: none"> a. outdoor spaces and buildings b. transportation c. housing d. social participation e. respect and social inclusion f. civic participation and employment g. communication and information h. community support and health services 3. Development of a 3-year city-wide action plan based on the findings of this assessment If possible, the plan will link to other municipal instruments to ensure that age-friendliness becomes a core responsibility for all municipal departments. 4. Identification of indicators to monitor progress against this plan. 	<p>AARP Network of Age-Friendly Communities commit to improving age-friendliness and submit to a rigorous membership assessment cycle. Once enrolled, a community has two years to develop an action plan. The action plan is based on assessments conducted within the community to identify needs across the eight WHO domains that influence the health and quality of life of older adults.</p> <p>Key steps to include in the planning phase:</p> <ol style="list-style-type: none"> 1. Establish mechanisms for involving older people in all stages of the process (e.g., create an advisory citizens' committee) 2. Conduct a comprehensive and inclusive baseline assessment of the age-friendliness of the community (in the context of WHO's eight domains of a livable community) 3. Develop a three-year community-wide action plan based on assessment findings 4. Identify indicators to monitor progress against this plan <p>At the five-year mark, the community is required to submit a progress report using the indicators in the action plan. This process leads to a cycle of continuous improvement. As the action plan priorities are accomplished, new ones are identified and form the basis for additional planning and implementation.</p> <p>Evaluation becomes an ongoing process as well, demonstrating progress against the baseline assessments previously identified. Evaluation helps determine ways to improve the action plan and demonstrate whether the strategies and action items are meeting the intended outcomes.</p>

WHO/AARP Network of Age Friendly Communities

Selection Criteria: Community Leadership and Overall Readiness

- **Political acceptance/support**
- **Community involvement**
- **Elected official concern**
- **NGO/Grassroots champions**
- **Master plan (e.g, bike lanes, pedestrian friendly/walkable, etc.)**
- **Sizeable population 50+**
- **Health issues (e.g., obesity/diabetes, low physical activity, poor nutrition)**
- **Other**

WHO/AARP Network of Age Friendly Communities

4 Phase Process | Cycle

- 1. Establish mechanism for involving older people in all stages of the process (e.g., create an advisory citizen's committee)**
 - 2. WHO's eight domains of a livable community)**
 - 3. Develop a three year community-wide action plan based on assessment findings**
 - 4. Identify indicators to monitor progress against this plan**
- Progress report using proposed indicators required at the five-year mark to serve as basis for continuous quality improvement.**
 - Evaluation is an integral part of the ongoing process to identify progress, emerging needs and update action plan.**

Montgomery County's Demonstrated Commitment to Age-Friendliness

History of government-led efforts to understand the needs of Montgomery County seniors and their caregivers and respond to them:

December, 1985	"Plan for Seniors Citizens in Need of Long-Term Care," Montgomery County Government (MCG) Division of Elder Affairs
March, 1987	"The Status and Needs of Elder Citizens," MCG Division of Elder Affairs
January, 1987	"Update-Recommendations: Plan for Seniors Citizens in Need of Long-Term Care," MCG Division of Elder Affairs
October, 1996	"Community Conversations on Aging Report," Up-county Task Force on Aging
July, 1999	"Computer Literacy for Seniors," Montgomery County Task Force on Computer Literacy
November, 2000	"Making Montgomery County the Best Place to Age," Vital Living Conference Report
June, 2002	"A Report on the Needs of Low-income Seniors in Montgomery County," Center for Health Program Development and Management, University of Maryland at Baltimore County
December, 2002	"Strategic Plan for Senior Services in Montgomery County," Towson University Center for Productive Aging
March, 2005	"An Inventory of County Government Programs Designed to Serve Senior," Office of Legislative Oversight
May, 2007	"Imagining An Aging Future for Montgomery County, Maryland," Towson University Center for Productive Aging
October, 2007	"Strategic Communications Plan for Addressing the Needs of Seniors in Montgomery County," Reingold, Inc.
March, 2008	Formation of County Executive Leggett's Subcabinet on Senior Vital Living
November, 2008	County Executive Leggett's Senior Summit
September, 2010	"Village Blueprint: Tips and Strategies for Developing a Senior Village," Leslie Marks, Consultant and the Bethesda/Chevy Chase Regional Service Center
December, 2012	Adoption of Commission on Aging's "Senior Agenda: Making Montgomery County A Community for a Lifetime."
FY2008-Present	Senior Budget Initiative

1

(In Process) County Executive Leggett's "Summit on Aging in Montgomery County"

Thursday, December 3, 2015

- **Planning efforts include:**
 - **Community Focus Groups** conducted to solicit input from a widely diverse (geographically, socioeconomically, race/ethnicity/culture, age—Boomers 50 years + to 100 years+) range of County seniors and caregivers
 - **Age-Friendly Survey** distributed electronically and paper-copy to reach wide range of diverse seniors/caregivers translated into various languages.
 - **Results of Focus Groups, Survey, and input from 8 Senior Subcabinet Workgroups** will form the agenda for the December 3rd Summit and serve as the basis for the preliminary "County Executive's 3-Year Age-Friendly Strategic Plan: Making Montgomery County An Inclusive Community for A Lifetime."



COMMISSION ON AGING

September 22, 2015

COMMISSION ON AGING 2015 SUMMER STUDY ON "COMMONALITIES AND DIFFERENCES IN LOCALITIES' APPROACHES FOR AGING IN COMMUNITY"

Co-Chairs: Isabelle Schoenfeld and Leslie Marks

EXECUTIVE SUMMARY

The Commission on Aging (COA) sponsored a 2015 Summer Study on "Commonalities and Differences in Localities' Approaches for Aging in Community." The objective of the study was to learn what other communities were successfully doing to create age friendly environments and where communities encountered challenges. It was also the intent of the summer study to identify opportunities for Montgomery County (MC) to improve current efforts to make the county a more age-friendly livable community. This report describes the study's background, findings, and recommendations.

The study consisted of three sessions held on June 23, June 30 and July 7, 2015. The invited presenters represented seven communities across the country including MC. Some of these localities were part of the World Health Organization (WHO)/AARP Age-Friendly Cities/Communities certification program. Others were part of the National Association of Area Agencies on Aging (n4a) Livable Communities Collaborative. In addition, there was a presentation on AARP's Livability Index. All out of state presenters participated via teleconference.

The presentations were guided by questions that were provided to the presenters ahead of time. The key findings were that although there were differences in how the communities organized and implemented their age friendly initiatives, there were significant commonalities. All the communities that were part of this summer study had a full time paid Executive Director, Coordinator, Manager, or another high-level position devoted to developing and implementing an Age Friendly/Livable Communities (AF/LC) Program. They also have an Advisory Board or Task Group comprised of representatives from different sectors of the community such as government, business, developers, academia, foundations, non-profits, and health care providers, other stakeholders. And, they typically develop a strategic plan or action plan (often informed by the results of a needs assessment survey) as a framework and for evaluation and accountability.

Based on the summer study findings and other considerations, the following recommendations were developed:

1. *Create a new high-level manager position, or, repurpose a high-level manager position that would be located in the Office of the County Executive and be solely devoted to the AF/LC program supporting and sustaining current age-friendly activities and programs and developing new ones.*

The Manager would coordinate with COA, the Senior Subcabinet, the MCNPPC, other key groups, attending meetings and providing input and updates. This position would also coordinate with the County Executive and Executive Departments, County Council, public, as well as other stakeholders.

2. *Alternatively, on an interim basis, until a high-level manager position can be created, the COA recommends a Senior Fellow position in the County Executive's office to fulfill some of the Manager's roles and responsibilities.*

Due to Montgomery County's current budget shortfall, COA recognizes that creating a new high-level manager position or repurposing an existing high-level manager position for AF/LC may not be doable at this time. A Senior Fellow would take the initial steps to develop and implement AF/LC initiatives.

3. *Create an AF/LC Advisory Board.* This Board would be led by the AF/LC Manager ¹ (or, in the interim, the Senior Fellow) comprised of representatives from various sectors of the County, including government, COA, business community, developers, universities, health care providers, non-profits, associations, foundations, media, public and other stakeholders in the county.

4. *Enhance the collaboration among the Senior Subcabinet departments to develop and/or implement AF/LC initiatives that cross departments and with the Maryland National Park and Planning Commission (MNCPPC)-Montgomery County Planning Department and Planning Board, for a more integrated approach.*

The creation of the Senior Subcabinet was an important initial step in the coordination of AF/LC initiatives among county government departments.

Another important step resulting from COA's 2014 Summer Study on "The Need to Improve Advocacy for Older Adults in Montgomery County Planning" was that a representative of the MNCPPC-Montgomery County Planning Department now has a seat on the Senior Subcabinet. The Senior Subcabinet members and workgroups should identify opportunities for greater collaboration.

5. *COA should coordinate closely with the AF/LC Manager (or, in the interim, the Senior Fellow) and have a seat on an AF/LC Advisory Board.*

¹ Advisory Board. Communities have created Advisory Boards as a vehicle and tool to reach out to the broader community including potential partners and stakeholders. Advisory Boards encourage ongoing support and "buy in" on activities and policies that support AF/LC programs. For example a Montgomery County Advisory Board could include representatives from the Senior Subcabinet and the Commission on Aging as well as other stakeholders. The Advisory Board is organized and managed by the AF/LC Manager. Not only does the Advisory Board have broad based representation, it takes a broad view to address AF/LC policies and programming and develops a strategic or action plan. The Board meets on a regular basis. The Advisory Board reaches inside and outside the government structure for input and support.

While the Manager and the Advisory Board would spearhead major activities of an AF/LC, the COA would continue to have an important role in: monitoring, advising, and advocating for AF/LC initiatives with elected officials at the Federal, State, and County levels, government departments, other relevant stakeholder groups. COA would also continue to educate and seek input and feedback from the public about AF/LC initiatives.

6. *COA should continue to advocate for inclusion of a "Senior" section in all Master Plans and Sector Plans.*

This was a recommendation in the 2014 Summer Study Report COA on "The Need to Improve Advocacy for Older Adults in Montgomery County Planning," which COA endorsed.

The Planning Department develops master plans, reviews applications for development and analyzes various information to assist public officials plan for Montgomery County's future. The Planning Board is responsible for approval of all master plans that affect neighborhoods and how we live. As a result of the Planning Board's role in community planning their actions have a significant impact on creation of age friendly/livable communities.

Charles Kauffman
Attorney at Law
5101 River Road
Bethesda MD 20816
301 467 9336 charleskauffman7@gmail.com

September 18th 2015

Montgomery County Council
HHS Committee
100 Maryland Avenue
Rockville MD 20850

RE: STATEMENT HHS HEARING SEPT.24 2015

Mr. Chairman and Members of the Committee:

Among the things I most appreciate in Montgomery County is the ability to discuss my concerns face-to-face with its leaders. I thank this Committee for affording me the opportunity of participating in this hearing. My testimony and statement are personal, submitted solely as an individual and not as a representative of any Commission, Board, Chamber or organization.

LEVERAGING COUNTY ADMINISTRATION AND THE W.H.O. AGE FRIENDLY PROGRAM

For many years Montgomery County has developed and devoted substantial administrative, financial and executive assets and funding for many projects which will fall within the scope and focus of the W.H.O. Age Friendly Program. The COA 2014 recommendation to enroll in the W.H.O. Age Friendly Communities program and the COA 2015 summer study recognized the values of enrolling in the worldwide program in enhancing the County's focus, scope, responsiveness, leadership, systematic interdepartmental organization, coordination and comprehensive planning .

"Age Friendly" is intergenerational, and affects virtually every facet of life in the County. County government must embrace the across-the-board elements under the cohesive, inclusive Age Friendly canopy.

I want to outline how this County Council and the County Executive can expedite, integrate and implement the Age Friendly Program achieving substantial progress, saving time and money by utilizing our existing administrative assets under a new Age Friendly Executive Director. Here are my recommendations:

1. Appoint an Executive Director for the Age Friendly Program. The Age Friendly director must act with the full support and authority of the County Executive and a minimum staff.
2. Appoint the Age Friendly Director to be co-chairperson of the Senior SubCabinet.

Charles Kauffman
Attorney at Law
5101 River Road
Bethesda MD 20816
301 467 9336 charleskauffman7@gmail.com

3. Empower the Senior SubCabinet as the umbrella organization for directing, communicating and coordinating Age Friendly related activities with all the executive departments. I am concerned with authority to assure prompt response and execution from the Departments.
4. Age Friendly Proposals must be merged in Sector and Master Plans thus it is absolutely essential to fully engage Montgomery Parks and Planning fully throughout the entire process, including planning, outreach, public forums, data gathering and research.

I respectfully direct your attention to:

- The recent extraordinarily robust and successful outreach by the Planning Department in obtaining public input and disseminating information in Bethesda, Westbard, and Kensington are notable.
 - The research and depth of data and information gathering capabilities of Parks and Planning are vast.
 - The outreach and public communication abilities of Parks and Planning are extraordinary.
 - The experience of Parks and Planning in navigating the legislative process through hearings and appearances is well established and essential.
5. Establish and reinforce the branding and marketing of "AGE FRIENDLY MONTGOMERY" in all communications and outreach efforts. Popularize "AGE FRIENDLY MONTGOMERY" with informational events, award programs, form specialized subcommittees i.e. "Age Friendly Business". The public relations effort is analogous to the successful efforts to organize and popularize "Villages" over the past 7 years.
 6. Economic Development Group to join Sub-Cabinet. It is essential to recognize the advantage of an internationally branded "Age Friendly County" in attracting businesses worldwide to the County. Engage the new Economic Development Group deeply in development and outreach.
 7. Assign a senior County Council staff member to liaison, review, monitor, report, support and assess progress to assure consistency, cooperation and success.

Respectfully submitted,

Charles Kauffman

CHARLES KAUFFMAN