



Commission on Aging Meeting
June 26, 2025
9:30 am to 12 pm

Commissioners: Wayne Berman, Linda Bergofsky, Yvette Monroe, David Engel, Laurie Pross, Elizabeth Barnes, Dixie Butler, Virginia Cain, Betsy Carrier, Vernell DeWitty, Joyce Dubow, Mona Grieser, Marie Sloan, Kate Stein, Eleanor Tanno, Morris Klein, Janice Zalen, Kendell Matthews, ChiQuita Battle, Ora Johnson, Albert Woodward, RC (Renee) Randall, Elizabeth Boyd, Candy Schimming, Kamilah Mantle, Lisa Sun, Robert Crosby. Commissioner not present: Norman Goldstein, Willie (Don) McCullough, Kathleen McGuinness. Alumni Commissioners: Marcia Pruzan and Jean Dinwiddie

County: Peter Illig, Dr. Patrice McGhee, Tara Clemons-Johnson, Kimberly Taylor (Long Term Care Ombudsman), Sara Swarr, Ingrid Lizama, Denise Israel

Special guests: CM Andrew Friedson, State Senator Ben Kramer, Del. Greg Wims (D 39), Del. Lily Qi (D 15), Melissa Widenhofer, WUMCO Help, Robin Mejski, Quang Le, BJ Carter, KuoHwa Wang, Matt Higgins, CM Friedson Office, Warren Hansen, CM Friedson Office.

Councilmember Andrew Friedson Remarks:

Councilmember Friedson expressed appreciation for the Commission's work and emphasized his commitment to advocating for the county's growing older adult population. As the youngest Councilmember representing the oldest demographic district, he highlighted his dedication to aging-related issues, especially around affordability, housing, and access to services. Councilmember Friedson referenced his work on property tax relief proposals for older adults, including the expansion of the Homeowners' Property Tax Credit, and noted efforts to improve housing accessibility, such as support for accessory dwelling units (ADUs) and the Design for Life program. He also praised the Age-Friendly Montgomery initiative and the Villages movement and acknowledged Senator Ben Kramer for his leadership on nursing home oversight. Friedson reaffirmed his partnership with the Commission and his commitment to ensuring that older adults can live with dignity and security in Montgomery County.

Q&A with Council Member Andrew Friedson and State Senator Ben Kramer

The second part of the meeting featured a Q&A session with Council Member Andrew Friedson and State Senator Ben Kramer, moderated by Commission Chair Linda Bergofsky and Commissioner Kate Stein.

Senator Kramer began by highlighting his 20-year tenure in the legislature and his consistent focus on supporting senior residents in Maryland. He emphasized the historical disconnect between the County Council and state legislators, praising the current collaborative

relationship. Senator Kramer detailed his legislative achievements aimed at protecting seniors, including:

- **Maryland's Silver Alert:** Successfully used hundreds of times to recover missing individuals with cognitive impairments.
- **First-in-the-nation legislation criminalizing undue influence:** Addresses the exploitation of seniors' assets, now replicated nationwide.
- **Mandatory reporting by banks and money transmitters:** Requires employees to be trained in identifying and reporting suspected scams against seniors.
- **Attorney General's authority to recover assets:** Grants the AG the power to act on behalf of exploited seniors to recover stolen funds, leading to the creation of a dedicated unit within the AG's office.
- **Gift card scam legislation:** A new law, effective in phases starting June 1, 2025, requires notifications that gift cards are for gifts and not debt payments, combating a \$250 million organized crime issue.

Commissioner Kate Stein then asked both officials how they decide which legislation to propose and how the Commission can best support their advocacy.

Council Member Friedson explained that his best ideas often come from external sources like the Commission or stakeholders. He outlined the legislative process, emphasizing the need to build coalitions and ensure the County Council has the authority from the state to act. For effective advocacy, he stressed the importance of:

- **Personalizing the issue:** Directly explaining how it affects real people is more effective than sending mass emails.
- **Showing scale and data:** Illustrating the wide-reaching effect of an issue along with personal stories.

Senator Kramer echoed these points, noting the Commission's support as key in highlighting the issue of uninspected nursing homes, which ultimately resulted in successful legislation.

Regarding the timing of legislative development, both officials recommended early engagement.

- **Senator Kramer** emphasized that the sooner, the better—ideally before October when bill drafting offices become overwhelmed. This allows for thorough consideration of complexities and unintended consequences.
- **Council Member Friedson:** Set specific times for engaging with the County Council on legislative and budget matters.
 - **Budget:** Connect with departments now for their upcoming March submission. The funding funnel becomes much narrower later in the process.
 - **Legislation:**
 - **August recess:** Ideal time for new legislative initiatives, providing

sufficient time for vetting and drafting.

- **December/January:** Ideal for starting initiatives that might be introduced in June.
- **First couple of weeks in June (post-budget):** Also a good time for planning fall initiatives.

When asked about the most persuasive factors in evaluating legislative initiatives, both agreed:

- Senator Kramer prefers a balanced panel that includes statistics, broad impact discussions, and personal stories to provide colleagues with a comprehensive understanding of the problem. He also mentioned the effectiveness of brief, one-on-one meetings with lawmakers.
- Council Member Friedson: Reiterated the importance of data and anecdotes—demonstrating both the broad impact and personal stories. He also emphasized the value of one-on-one advocacy outside of formal testimony.

Chair Linda Bergofsky thanked both officials for their insights, noting the Commission's intent to put their advice into action and reach out in August to discuss their fiscal year 2027 priorities. She applauded Senator Kramer for his work on nursing home inspections and Council Member Friedson for his efforts in housing.

Department of Health and Human Services (DHHS) Update: Budget and Strategic Priorities. Chair Linda Bergofsky introduced Dr. Patrice McGhee, Chief of Aging and Disability Services, to provide an update on the recently approved budget and the department's main initiatives within Montgomery County's Department of Health and Human Services (DHHS).

FY26 Budget Wins for Aging and Disability Services

Dr. McGhee reported a **7% increase** (\$5.5 million) to the overall budget for Aging and Disability Services. Key allocations include:

- **Multi-program upgrades:** Over \$1 million allocated to improve existing programs.
- **Consortium Supplements:** A 3% increase for the 42 providers in the Developmental Disabilities consortium and the 19 adult medical daycare providers.
- **Respite care services:** An increase of \$112,045 to fund a rate increase for respite care providers from the previous year. Dr. McGhee emphasized respite care as a growing priority due to the increasing populations of older adults and individuals with disabilities.
- **Senior Nutrition Program:** \$101,225 allocated to cover the higher cost of food for congregate and home-delivered meals.
- **Silver Spring Recreation and Aquatic Center:** \$147,875 allocated for ongoing meal services at this new location, shifting from ARPA funding to continuous county support.

Dr. McGhee stated that the final published budget packet will be shared with the Commission.

The Year-Long Budget Cycle and Advocacy Opportunities

Dr. McGhee explained that the DHHS budget process is a continuous, year-long effort, starting with "Future Financial Impact" (FFI) forecasting. She advised that the Boards, Commissions, and Committees (BCCs), including the Commission on Aging, will have an opportunity to present their budget requests or priorities to the County Council, typically in **September or October**, through the Chair of the Commission.

HHS Strategic Roadmap: Pillars and Initiatives

Dr. McGhee then presented the **unpublished DHHS Strategic Roadmap**, a two-year plan created by Director James Bridges. This roadmap is based on the Community Health Needs Assessment and aims to inform the department's "No Wrong Door" approach to services, which combines five key service areas: Aging and Disability Services, Behavioral Health Services, Ending and Preventing Homelessness, Children, Youth and Families, and Public Health. The roadmap is organized around three main pillars:

1. Deepening Community Connections:

- **Key actions** include expanding partnerships, increasing outreach, strengthening youth programs, and enhancing care coordination.
- **Initiatives:** A strong public awareness campaign for Aging and Disability Services is launching soon, focusing on underserved zip codes and using a new slogan. DHHS is also working to strengthen relationships with existing partners and has a workgroup with the Primary Care Coalition to address gaps in services for hard-to-place patients (older adults and individuals with IDD) transitioning from hospitals to community-based programs.

2. Using Technology to Improve Access and Efficiency:

- **Key actions:** Expanding telehealth services, enhancing digital platforms, improving case management systems, and leveraging data analytics.
- **Initiatives:** Aging and Disability Services is working on improving data output and analysis, hiring dedicated staff both internally and within the Performance Analytics and Customer Service (PACS) department. DHHS is also updating its case management system, launching the Community Connect portal for residents to apply for benefits and track applications, and recently held a ribbon-cutting ceremony for its mobile health van. Starting in August, Aging and Disability Services resource connectors will collaborate with the mobile health van to provide on-site information to older adults.

3. Establishing Economic Justice and Stability as a Public Health Priority:

- **Key actions** include expanding rental assistance, increasing access to food security programs, strengthening workforce development, and advocating for policy change.
- **Initiatives:** Dr. McGhee emphasized the urgent need to expand respite care services to address waitlists and funding shortfalls.

Area Agency on Aging (AAA) Updates

Dr. McGhee shared updates on federal changes and local advocacy efforts:

- The **Administration for Community Living (ACL)** will not be dismantled but will transition into a new office: the Administration for Children, Youth, Families and Communities.

- The County Council voted to send letters to Senators Chris Van Hollen and Ben Cardin (not Brooks, as initially stated) and Congress, advocating for the **reauthorization of the Older Americans Act** and the protection of the Social Services Block Grant.
- **Kimberly Taylor** has been appointed as the **acting manager for the Long-Term Care Ombudsman Program**. The department is still advertising for a permanent manager position.

Q&A Highlights

- **Campaign Management:** The new public awareness campaign is a **partnership with the Public Information Office (PIO)** and includes contracted services with partners like Comcast, aiming to increase calls to the Aging and Disability Resource Unit (ADRU) for information and assistance before a crisis occurs.
- **Data Analytics and Visualization:** Dr. McGhee confirmed that the new data analytics positions within Aging and Disability Services and PACS will be able to assist with **data visualization and presentations**, aiming to improve the disjointed data collection and reporting to better inform advocacy efforts.

Chair Linda Bergofsky expressed gratitude to Dr. McGhee and introduced several community partners present at the meeting, including representatives from DHHS, Recreation, and Transportation.

April 2025 Commission on Aging minutes approved.

Committee Reports & Updates

Caregiving Forum & Initiatives

Commissioner Wayne Berman reported that the recent Caregiving Forum marked a shift from the usual one-time events to a series of ongoing advocacy efforts. The working group plans to reconvene in July to prepare state-level initiatives and participate in events for National Caregiving Month in November, in partnership with Ruth Kirschner, head of the County's Caregiving Program.

Commissioner Janice Zalen expressed interest in joining the caregiving task force, emphasizing the importance of follow-up beyond report writing.

Long-Term Care Ombudsman Update

Dr. Patrice McGhee discussed the acting manager for the Montgomery County Long-Term Care Ombudsman Program. The program is focusing on volunteer recruitment and revitalization, with support from the state ombudsman and former ombudsmen including Wayne Berman and Dixie Butler.

Dixie Butler highlighted the importance of leadership in the ombudsman program, as well as the Commission's work on nursing home reviews and potential future surveys on assisted living facilities.

Aging in Community Committee

Betsy Carrier reported that the committee is exploring budget priorities and sustainable housing

solutions for older adults. A \$90K research project led by Linna Zhu of the Urban Institute emerged from a previous CoA Public Forum. The committee also focuses on transportation and aging-in-place programs, including support for the Village Program and improving tech access for seniors.

Health and Wellness Committee

Laurie Pross summarized recent presentations on brain health, creativity, and physical fitness. The committee is working with AIC for the upcoming July meeting.

Communications Committee

Marie Sloan announced that the June 50+ program would highlight elder abuse prevention. She thanked Lori Cross for leading the library liaison program and shared details about upcoming Ambassador presentations across the county. David Engel encouraged new commissioners to get involved, pointing out the program's role in informing residents about services for older adults. The initiative has now partnered with the Aging and Disability Resource Unit to assist with outreach and materials. Plans are underway to expand into multilingual sessions.

Public Policy Committee Summary

Commissioner Kate Stein gave a quick update from the Public Policy Committee. In June, the committee was briefed by James LeBlanc of Works For Us Montgomery about county support for displaced older workers, especially in light of federal layoffs. They also discussed an upcoming forum and began setting priorities for **Fiscal Year 2027**, including potential budget proposals and state-level advocacy goals. Stein emphasized the committee's role as the "arms and legs of advocacy" and encouraged new members to join their monthly meetings (second Thursday, 9:30 AM). Chair Linda Bergofsky encouraged new commissioners to attend all committee meetings initially to explore their interests.

Priority Setting Process for FY27

Linda Bergofsky then led a discussion on the process for setting the Commission's FY27 priorities. As the county budget for FY26 gets finalized and FY27 deliberations begin, the Commission needs to establish its forward-looking priorities. Bergofsky introduced a new form for committees to use, listing current FY26 priorities and prompting an assessment of progress made. Committees will be asked to determine if each priority should be continued, why it remains important, if it aligns with the DHHS strategic roadmap, and if any changes are needed. Committees may also decide to discontinue a priority if it's no longer effective. A second form will be provided for new initiatives, requiring background information, data, potential impact on older residents, and identification of partner organizations (within or outside the Commission) for collaboration.

Committees will review these forms at their July meetings. The Executive Committee will then compile the information to create a working list of FY27 priorities. The September Commission meeting (with no meeting in August) will include presentations from each committee, followed by discussion and a vote on the final priorities. Wayne Berman, Co-Chair of the Commission, clarified that these priorities will be presented by Linda Bergofsky to the County Council's Health and Human Services (HHS) Committee in **October**, aligning with the council's budget and

advocacy considerations. Commissioner Lisa Sun asked about the latitude for committees to canvas other entities when developing priorities. Linda Bergofsky affirmed that reaching out to external partners, like Montgomery College or other commissions, is encouraged to gather information and build support for initiatives focused on older residents.

Advocacy Training and Buddy System

Linda Bergofsky announced that the Community Action Agency will offer a two-session advocacy training class specifically for Commission on Aging members (and potentially alumni), likely in September and October. This training will cover the best practices in advocacy, including a case study on the Commission's successful effort for nursing home inspections. Bergofsky emphasized that advocacy is core to the DNA of the Commission on Aging, deeply embedded in its charter and essential for securing vital funding like the Older Americans Act and the Social Services Block Grant. Advocacy can take many forms, from individual meetings with legislators to written and in-person testimony, and participation in broader campaigns.

Additionally, the Commission is re-establishing its buddy system to help new commissioners, especially those who have recently joined, understand the nuances of the Commission's operations and successfully navigate their roles. New commissioners will be assigned a "buddy" for informal support and guidance. Orientation training will also be provided to cover formal administrative and procedural details.

Q&A with Delegates Greg Wims and Lily Qi

Delegates Greg Wims and Lily Qi of the Maryland House of Delegates attended the meeting for a Q&A on best practices in advocacy, following up on the morning's discussion with county officials.

Delegate Qi explained that legislative ideas originate from various sources, including constituents, advocacy groups, lobbyists, and county government. She advised advocates to suggest specific, narrowly focused ideas that can make a real difference, as complex or costly initiatives often take longer to implement. She provided examples of her past legislative work, including transparency for home care workers and a withdrawn bill concerning Continuing Care Retirement Community (CCRC) deposits, which she abandoned due to mixed messages and lack of unified senior testimony. She stressed the importance of unified support from the affected constituency for a bill to succeed.

Delegate Wims, recently recognized as an African American Living Legend, confirmed his commitment to working with the Commission on Aging on top legislative priorities, specifically mentioning a new initiative regarding **dementia and Alzheimer's**. He outlined his process: working with bill drafters, checking fiscal notes, and securing diverse, expert witnesses for testimony (aiming for six or more, despite some committee chairs preferring fewer). He emphasized the importance of convincing committee colleagues to vote bills out of committee, as this is a critical step for a bill to advance.

Regarding the best time to engage with state delegates, Delegate Qi suggested any time after Labor Day and until Thanksgiving, as legislators focus more on new legislation and bill drafting during this period. She also noted that in-person testimony, even via Zoom, is strongly preferred over written testimony because it makes a stronger impression and allows for direct engagement and emotional connection, which can be highly compelling. Delegate Wims

reinforced this by citing an example where a crying teenager's testimony negatively affected the situation and influenced a bill he supported. He emphasized that a well-rounded panel with expertise and personal stories helps persuade colleagues.

Commissioner Lisa Sun inquired about the preference for oral or written testimony. Both Delegates clearly preferred in-person (or virtual) oral testimony, emphasizing its ability to make a stronger impression and facilitate direct interaction. Delegate Wims recounted an instance where a tearful testimony swayed colleagues against a bill he supported, underscoring the power of emotional connection in advocacy.

Delegate Qi concluded by sharing an example where her bill on family councils in assisted living facilities prompted administrative action by the Department of Health, demonstrating that advocacy does not always require legislative change to achieve its goals.

Chair Bergofsky ended the meeting with a motion to adjourn and a message: Our next meeting will be July 24, 930. We have not yet finalized the agenda, but we will send it out to you again via email, along with your buddy assignments.