

HEALTH AND WELLNESS COMMITTEE OF THE COA

Meeting Notes

9:30 - 11:00 am

January 3, 2023

ZOOM

In Attendance: Marsha Weber, Neal Brown, Barbara Selter, Laurie Pross, Marcia Pruzan, Revathi Vikram, David Engel, Kendell Matthews, Wayne Berman, Betsy Carrier, Virginia Cain (note-taker), Joyce Dubow

Staff: Tina Purser Langley

Motion to approve minutes. Minutes approved.

Changes to the Health and Wellness Committee

As Neal Brown's term on the Commission on Aging is over, he will be stepping down from the position of co-chair of the Health and Wellness Committee. However, he will remain involved and attend future meetings. Marcia Pruzan will be the incoming co-chair and share responsibilities with Marsha Weber who will be continuing in her current role.

Life Transitions Project

Most of the meeting focused on the life transitions project being undertaken by the Committee.

It was stated that all materials are drafts at this point. Comments are welcome. An administrative suggestion was made to add draft number and date to documents being circulated to facilitate organization.

Topics under development for fact sheets were discussed individually.

Housing

The topic of housing has been structured in a fact sheet format. It includes a logo with a silhouette of the map of Montgomery County. The object is to create a uniform look across fact sheet topics addressing life transitions. The first page focuses on the decision to stay in your present home or move elsewhere. The second page focuses on local resources particularly those available through the County government.

Concern was expressed that the title did not reflect the content of the document. A suggestion was made to take several titles to a focus group to get reactions different options. One approach would be to provide titles to the groups and ask what they think the document would contain with that title. Tina and Rev offered to investigate getting feedback from groups they are affiliated with such as Bone Builders.

A suggestion was made to include information on Montgomery County's Design for Life <https://www.montgomerycountymd.gov/design/>

The format and visual appeal of the document is good.

Starting a conversation

The topic of talking with family members about preferences and available resources was entitled: "Life Transitions: The Gift of Planning Ahead". Concern was expressed that the concept of this as a gift did not resonate with some people. It was pointed out that the concept originated from

the meetings with a variety of different cultural communities in Montgomery County where representatives said that some older community members reluctant to talk about these issues might be persuaded if they viewed it as something they were giving to their children. The document could be rewritten to continue to keep the concept but make it less of a focus.

Legal and Finance

Comments on the presentation of the legal and financial component of the documents suggested the need to include links to the Social Security Administration and State of Maryland sites. It was suggested to include information on the need to obtain multiple copies of original documents such as death certificates. It was recommended to remove the word “estate” from “estate planning” as this may not seem germane to many people who view it as only relevant for wealthy people while planning is appropriate for everyone.

Some older adults may have guardianship for grandchildren or, in certain situations, adult children or others. Plans for these guardianship arrangements must be made in the event the older adult cannot fulfil these responsibilities.

The second section of the document related to elder abuse and exploitation seemed like a separate topic. While highly important, it was not clear if it should be a separate fact sheet or reserved for another activity.

Personal Information Worksheet

Discussion about the desirability of including columns for usernames and passwords for various accounts settled on not including columns on the worksheet but discussing the benefit of providing access to them in a narrative accompanying the table. The narrative also would discuss the need to update the information as it changes. Earlier presentations and discussions identified additional items to include on the worksheet, such as military records, trusted advisors, clergy, executors of wills. A participant recommended separating health insurance from other insurance.

A suggestion was made to make the worksheet in Word rather than Excel.

Medical and Health

In addition to the items in the outline presented, Committee members suggested including information on long-term care insurance, online medical records, understanding coverage. The importance of a File of Life was stressed although it was noted that it is the information contained in it, e.g., doctors, medications, conditions, that was important rather than the format. Information on care teams is important to include.

Cross-cutting issues

Several topics came up during the discussion of all topics. To what extent does the topic lend itself to narrative vs. lists? Some people preferred lists; some more narrative. It may depend on the topic and within a topic the final fact sheet may include both.

Some items were duplicated across several of the draft fact sheets. This was not necessarily a problem since each fact sheet will be a stand-alone document and the items are relevant in the context of more than one topic.

The group thought the titles for each of the sheets should be presented to a focus group. The Committee will continue to work on titles at the next meeting.