

COMMISSION ON AGING 2015 SUMMER STUDY ON “COMMONALITIES AND DIFFERENCES IN LOCALITIES’ APPROACHES FOR AGING IN COMMUNITY”

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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.

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 programing 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.

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.

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 COA's 2014 Summer Study Report 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.

BACKGROUND

Over a number of years, MC's Executive and Council have undertaken and/or supported many policies and programs that address key aspects of an age-friendly community. In addition, COA has informed the public and decision-makers, through education and advocacy, about key characteristics of an AF/LC. These combined efforts have resulted in significant benefits to MC's older adult residents and thereby all residents of the county. Examples of these accomplishments since 2000 are:

- "Strategic Plan for Senior Services in Montgomery County," Towson Center for Productive Aging, 2002
- Publication of "Imagining an Aging Future for Montgomery County," MD, Towson University, Center for Productive Aging, 2007
- Senior Sub-Cabinet on Vital Aging comprised of representatives from MC departments and MNCPPC Planning Department, 2008

- Senior Summit - November 20, 2008
- “Village Blueprint: Tips and Strategies for Developing a Senior Village, 2010
- Adoption of MC’s “Community for a Lifetime: Senior Agenda” – 2012
- An increase in affordable housing
- More accessibility and availability of transportation options
- New Recreation/Senior Centers
- A new position: MC Village Coordinator
- A new position: MC Mobility Manager
- A new position: MC Caregivers Support Coordinator
- A Senior Fellow for Housing in the Department of Housing and Community Affairs
- A Senior Fellow for Transportation on the County Council staff
- Advocating successfully for specific legislation at the State and County level
- The Vital Living Network published the “Vital Living Networker,” 2015
- Planning for the December 2015 County Executive’s Summit on Aging

COA has informed itself and their stakeholders about aspects of AF/LCs in a number of ways, including:

- Guest subject matter experts at COA Aging-in-Place; Health and Wellness; Communications; and Public Policy Committees’ meetings
- Guest subject matter experts presentations at monthly COA meetings including from AARP Public Policy Institute, National Association of Area Agencies on Aging (n4a), World Health Organization (WHO)/AARP Age-Friendly DC
- Guest subject matter experts presentations at COA Summer Studies including panelists from jurisdictions across the country
- Annual COA Stakeholder Forums
- Annual MC State Legislators’ Breakfast Forums

Over the last two summers, COA conducted two studies, specifically focused on AF/LCs. The 2014 Summer Study “The Need to Improve Advocacy for Older Adults in Montgomery County Planning” and this study “Commonalities and Differences in Localities’ Approaches for Aging In Community.” The 2014 Summer Study provided the following recommendations that were endorsed by COA.

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.

This report on the 2015 Summer Study provides COA recommendations (see Recommendation Section) to help ensure that Montgomery County continues to make progress in becoming an even better age-friendly/livable community for all residents.

INTRODUCTION

The 2015 Commission on Aging summer study examined Age Friendly/Livable Communities (AF/LC) in different parts of the country in an effort to learn what other communities were successfully doing to create age friendly environments and where communities encountered challenges. It was the intent of the summer study to learn from what others are doing and identify opportunities for MC to improve their current efforts to make MC a more AF/LC.

In addition to learning directly from representatives from the various communities, several publications that address the age-friendly community movement, which has been growing throughout the country and the world for the last decade, were reviewed (see References List, Appendix A). Also, Grantmakers in Aging (GIA) webinars were viewed. One reference is the Gerontological Society of America Public Policy & Aging Report, Winter 2015 “Making a Home in the City: The Age-Friendly Community Movement” which included several articles on different aspects of this movement. The Introduction states:

“Designed foremost to promote aging-in-place, the movement seeks to engage political actors, service providers, and community organizations in ways to better accommodate the needs and preferences of older and frequently frail citizens. This movement encompasses the Villages model; service-rich naturally occurring retirement communities; and livability programs for all generations.”

Another informative reference was the American Planning Association’s (APA) Aging in Community Policy Guide, July 2014, which states:

“...that by 2030, one in every five people living in the US will be over the age of 65. The APA recognizes that the aging of the population creates a unique opportunity and responsibility to apply sound planning approaches and policy to improve communities to serve the spectrum of needs and abilities of older adults...A multi-generational planning approach ensures that the needs of all residents are met and that older members of our communities are not at risk of social isolation, poverty, declining health, and poor economic well-being”

The APA goes on to state that:

“The planning community can be a leader in encouraging comprehensive approaches and in mobilizing resources to enhance the quality of life of our aging population.”

As described in the Background Section of this report, COA’s 2014 Summer Study, “The Need to Improve Advocacy for Older Adults in Montgomery County Planning,” included three recommendations related to improving the Planning Department’s support for an age-friendly County, e.g., in Master and Sector Plans. The first recommendation has been incorporated into this report’s recommendations.

In this report the term AF/LC is used to encompass all the approaches that we explored in the summer study. The term “Age-Friendly” is often only associated with the WHO/AARP certification program, but in this context it means any community that is focusing on programs and supports to improve the age-friendliness of their community. In all instances AF/LC is defined as a community that is age-friendly and livable for all generations.

The Summer Study participants (see list of participants in Appendix B) heard from representatives of communities that are part of the National Association of Area Agencies on Aging (n4a) Livable Communities Collaborative. Other representatives were from communities that were implementing the WHO/AARP Age-Friendly Cities/Communities certification program model. Montgomery County’s “A Community for a Lifetime” was represented as well. The presenters were sent questions ahead of time to help guide their presentations (see Appendix C). All the out-of-town presenters participated via teleconference. (see Appendix D for presenters’ bio sketches).

The first of the three summer study sessions, June 23, 2015, focused on the n4a Livable Communities approach. Stephanie Firestone, n4a Program Director, moderated the session. Lynda Meyer and Katy Mason of Larimer County, CO and Cathy Bollinger, York County, PA discussed how those communities use the n4a strategies to implement livable communities programs. Shannon Guzman, AARP Public Policy Institute, presented on the AARP's Livability Index and how Montgomery County fares in the Index's assessment.

Stephanie Firestone made introductory remarks about elements of a Livable Community. n4a defines Livable Communities as one that enables citizens to thrive across their lifespan. It ensures: social supports, affordable housing options; transportation options; accessible public spaces; basic amenities nearby; and fosters social interaction and community involvement.

The second summer study session, June 30, 2015, was moderated by Christy Page, Assistant State Director for Outreach, AARP Maryland, and focused on the Age-Friendly Cities/Communities approach. The following panelists presented information on their age-friendly programs: Kate Clark, Age-Friendly Philadelphia's Philadelphia Corporation for Aging and GenPhilly, Philadelphia PA; Emily Shea, Commission on Affairs of the Elderly, Age-Friendly Boston, Boston MA; Bobbi Orsi, Age-Friendly 2020 Vision, Berkshire County, MA; Mary Blumburg, Atlanta Regional Commission/Area Agency on Aging, Atlanta, GA; and John Kenney, Department of Health and Human Services, Montgomery County, MD.

WHO states that an "Age-Friendly City encourages active ageing by optimizing opportunities for health, participation and security in order to enhance quality of life as people age. In practical terms an age-friendly city adapts its structures and services to be accessible to and inclusive of older people with varying needs and capacities." Other definitions state, in general, that in an age-friendly community the physical and social environments are designed or modified to help seniors age actively. That is, the community's policies, services, programs, and structures are set up to help seniors live safely, healthfully and remain involved.

In addition to describing the vision for each of seven focus areas, MC's "A Community for a Lifetime: The Senior Agenda" includes a Commitment to Older Adults which advocates for: a policy against ageism/stereotyping; older adults included in all planning activities; planning will consider diversity, inclusiveness, and intergenerational elements; demographic data incorporated into planning; distribution of resource information relevant to older adults; options for aging in place and alternatives; and promoting public-private partnerships to implement the Senior Agenda.

The third summer study session, July 7, 2015, was a brainstorming session by the summer study participants. They identified and discussed the summer study

sessions' information and key messages, themes and possible recommendations. (See minutes of the June 23, June 30 and July 7 summer study sessions in Appendix E).

Following are the Findings and Recommendations sections of the report. The Findings Section summarizes the information obtained regarding each of the communities Approach/Model; Lead Entity/High-Level Lead Position; Key Activities; Focus Areas; Resources; and Partnerships in their efforts to create an AF/LC. The Recommendations Section provides six recommendations that are based on the summer study exploration and other considerations, specifically focusing on Montgomery County's becoming an even better age-friendly community for a lifetime.

FINDINGS

The following subsections summarize the information derived from the June 23 and June 30 summer study sessions' presenters representing different AF/LC communities. They are aligned with the questions that were provided to the presenters prior to the sessions. It also includes information about the AARP presentation on the Livability Index.

Approach/Model

The presenters implemented one of three approaches of AF/LC: the n4a Livable Communities for All Ages; the WHO/AARP Age Friendly Cities/Communities; and MC's Community for a Lifetime.

The AARP is an institutional affiliate of WHO's Global Network of Age-Friendly Cities and Communities. The WHO/AARP Age-Friendly Cities/Communities certification program consists of: a Planning Phase including formation of an Advisory Council, a baseline assessment of livability, and an action plan for improvement with associated indicators; an Implementation Phase where a community puts its action plan items into practice and monitors indicators; and an Evaluation Phase which is an on-going process of a community's monitoring and documenting activities and changes using its indicators of success. It consists of eight domains: Outdoor Spaces and Buildings; Transportation; Housing; Social Participation; Respect and Social Inclusion; Civic Participation and Employment; Communication and Information; Community Support and Health Services. Age-Friendly DC added two additional domains based on feedback derived from their needs assessment: Emergency Preparedness and Resilience and Elder Abuse, Neglect, and Fraud.

n4a is a 501(c)(3) membership association representing America's national network of 623 Area Agencies on Aging (AAAs). The n4a Livable Communities program includes guidance to communities based on ten key strategies: Collaborate Across Traditional and Nontraditional Sectors; Celebrate Racial and

Ethnic Diversity; Build Individual Relationships; Honor Your Unique Local Community; Revere Older Adults; Embrace Longevity as an Opportunity; Tackle the Social Factors that Determine Community Wellness; Seize Opportunities to Infuse Age in Everything; Send the Right Messages; Leverage Local Dollars for Livability.

MC “A Community for a Lifetime: The Senior Agenda” was developed by COA and was approved by the County Executive and adopted by the County Council in December 2012. The Senior Agenda consists of a Commitment to Adults and seven key focus areas: Transportation, Housing, Socialization and Leisure, Health and Wellness, Communications, Employment, and Security and Safety.

Although there are commonalities among these approaches in terms of what aspects of community life they address, there are also differences in the approaches. (for example, see the Comparison of the Age-Friendly DC domains and MC’s Senior Agenda in Appendix F).

In her introductory remarks at the June 23rd summer study session, Stephanie Firestone, n4a, discussed the elements of a Livable Community. This list applies to the other approaches as well:

- Ensures social supports are in place
- Ensures people have affordable housing choices that are appropriate for their need at different ages and abilities
- Enables people to get around by providing transportation options and designing appropriate public spaces
- Provides basic amenities like a grocer and pharmacy nearby so people don’t need to get into a car to meet their daily needs
- Fosters social interaction and Community involvement through the creation of intergenerational public spaces and opportunities for engagement

It is important to note that none of the models specifically prescribe **how** a community should organize/prioritize/implement/evaluate its AF/LC programs/activities. No communities are alike in what aspects of an AF/LC they choose to address. In the n4a approach, communities may focus on one or more of the strategies as a priority. However the WHO/AARP Age-Friendly Cities/Communities model is a systematic phased approach where communities address all the domains to gain WHO certification.

Lead Entities/High-Level Lead Positions

The summer study question about what entity has the lead role initiating, promoting, implementing, advocating for AF/LC in a community was to determine if there is a common organizational lead entity or different organizational lead entities among AF/LC communities that we studied. We learned that the lead

entity for the AF/LC initiative or programs varied greatly among the communities represented. The lead entities included:

- Area Agency on Aging (at the city, county regional levels of government or a non-profit corporation): (Boston, MA; Atlanta, GA; Philadelphia, PA)
- For-Profit Senior Caregiving business and Task Group (Berkshire County, MA)
- County Office on Aging in the Department of Human Services (Larimer County, CO)
- Community Foundation (York County, PA)
- County Executive Branch Senior Subcabinet and the AAA, Montgomery County, MD)

In addition to the communities represented by the summer study presenters, the Grantmakers in Aging (GIA) July 9, 2015 webinar “Finding the Best Lead Agency to Make Your Community Age-Friendly,” affirmed the diversity of lead entities as represented by their panelists:

- Universities Institute on Aging (Portland, OR; Bloomington IND)
- Mid-America Regional Council (MARC) (includes parts of two states: KS and MO; nine counties, 119 cities)
- New York Academy of Medicine, City Council, and Mayor (New York City, NY)

Age Friendly-D.C.’s lead entity is the Office of the Deputy Mayor for Health and Human Services.

Despite the great diversity in organizational lead entities, there was a significant commonality in the type of leadership provided in the AF/LCs in the study. They have a high-level lead person who is responsible and accountable for the AF/LC programs. This position was at the Executive Director, Manager, or Coordinator level and dedicated to the AF/LC program. The lead person’s AF/LC responsibilities typically included:

1. Identifying potential AF/LC partners from the different sectors of the community and forming, organizing and managing an AF/LC Advisory or Task Group comprised of those partners.
2. Developing an AF/LC strategic or action plan and setting priorities with the Advisory or Task Group.
3. Having a seat at the table of other organizations/task groups/boards/commissions who were developing/conducting activities related to an AF/LC.
4. Conducting surveys, planning meetings including summits and workshops.
5. Identifying potential sources of technical and/or financial assistance and applying to those sources for assistance.
6. Coordinating and communicating with stakeholder groups and different sectors or the community.
7. Ensuring the inclusion of adults 55 plus in all initiatives.

The GIA July 9th webinar stated that the leader of a successful age-friendly initiative must have the capacity to be an action-oriented community change agent, a task-oriented coordinator, and a collaborator with many different types of stakeholders.

Key Activities

In addition to activities that all the presenters' communities have undertaken, such as regular collaborative meetings with partners, a need to prioritize goals and activities, and the use of volunteers to help achieve age friendly goals, the summer study presenters identified the following as key activities:

1. Housing: Affordable housing was listed as a priority goal. The activities below are examples of actions taken to help achieve affordable housing in their communities.
 - a. Survey creative housing options
 - b. Identify current housing opportunities
 - c. Look at lack of affordable housing and lack of affordable assisted living
2. Mobility: Mobility refers to both transit access as well as community walkability or pedestrian safety.
 - a. Increase transportation options and the use of transit
 - b. Provide safe walking paths for access to amenities and needs
3. Health & Wellness: This refers to options available to older adults that allow them to be full participants in community life.
 - a. Identify barriers to walking. Walking is both a mobility access issue as well as a health and wellness issue.
 - b. Implement age-friendly elements to existing community events and destinations (e.g., park re-design).
4. Culture of Aging: Several communities found that there wasn't a positive or realistic view about older adults. They found that there needed to be education and sensitizing people's behavior and attitude towards older adults (e.g., their contributions to the community, their evolving needs). Some examples of actions taken to address this issue were:
 - a. Write monthly media articles about contributions of older adults.
 - b. Host candidate forums.
 - c. Address issues that impact quality of life for seniors.
 - d. Create an age friendly designation for businesses, organizations, and schools.
 - e. Include older adults in all age-friendly endeavors.
 - f. Change perceptions of aging in different ways including the use of language when speaking/writing about older adults.

Focus Areas

The following are examples of focus areas that communities are putting their people power and their financial resources:

Larimer County, CO:

Partnerships for Age-Friendly Communities in Larimer County (PAFC) established the following four priority working groups with associated goals:

1. Culture of Aging
2. Housing
3. Mobility and Access
4. Health and Wellness

Each of the work groups identified projects in their area. In addition Larimer County hired a consultant, with funds from n4a, to train volunteers on how to manage age-friendly projects.

York County, PA

York County Community Foundation's main focus at this time is on "culture change" through an initiative called "Embracing Aging: Changing the Perceptions of Aging." This culture change is imbued in all their age-friendly activities:

1. Created an awareness program that addresses aging biases, helps dispel myths about aging, and fosters increased respect for older adults.
2. Convened influencers and implementers to affect broad change across all aspects of how a community supports multi-generational livability.
3. Served as a catalyst for introducing ideas to lead change through applying age-inclusive thinking.

Atlanta, GA

Atlanta's Regional Commission/AAA (ARC) is the Regional planning and intergovernmental coordination agency for the 10-county area. Their Lifelong Community focus areas are:

1. Promote Housing and Transportation Options
2. Encourage Healthy Lifestyles
3. Expand Access to Services

ARC's Lifelong Community Principles are:

1. Connectivity
2. Pedestrian Access and Transit
3. Neighborhood Retail and Services
4. Social Interaction
5. Diversity of Dwelling types
6. Healthy Living
7. Consideration for Existing Residents

Boston, MA

Age-Friendly Boston became a WHO Age-Friendly Cities participant in May 2014.

1. Created a needs assessment: 20 structured listening sessions
2. Senior housing is a priority.
3. Conduct fundraising for projects that resulted from the three-year action plan.

Berkshire County, MA

Berkshire County was accepted into the WHO Age-Friendly certification program in 2015

1. Berkshire County Age-Friendly Vision 2020 established a Task Force and hosted the Age-Friendly Vision 2020 Summit in June 2015
2. Surveyed residents based on the AARP tool kit

Montgomery County, MD

Montgomery County has addressed several focus areas that relate to aspects of an AF/LC community, including through the following accomplishments:

1. The Commission on Aging developed “The Community for a Lifetime: Senior Agenda” that both the County Executive and the County Council adopted as a framework for creating an age friendly community.
2. The County Executive created the Senior Sub-Cabinet on Vital Living. The Sub-Cabinet is composed of the County Government department heads and a representative from the Planning Department. They meet quarterly to share information.
3. Several key transportation programs for seniors were implemented. A new position, “Mobility Manager,” was created to promote transportation programs/options for seniors.
4. A new position “Village Coordinator” was established to help develop new Villages with a focus on diverse communities in the County and to help sustain existing Villages.
5. A new position: Caregivers Support Coordinator. This position was recently unfrozen and will be advertised.
6. A robust senior centers’ programming through the Recreation Department. Free meals are also offered at some of the Senior Centers.

Philadelphia, PA

Age-Friendly Philadelphia administered by Philadelphia’s Area Agency on Aging, Philadelphia Corporation for Aging (PCA). PCA adapted four principles to create a SAFE model whose areas of focus are:

1. Social Capital: Being active and connected in one’s neighborhood.
2. Flexible and Accessible Housing: Having the option to remain in

- one's home and/or community.
3. Mobility: Having access to public transportation and a walkable environment.
4. Eating Healthy: Fresh fruits, vegetables, and other nutritious foods are available.

Resources

The AF/LC's represented by the summer study presenters described a variety of financial and technical resources. These sources included:

- National Association of Area Agencies on Aging (n4a)
- Met Life
- AARP
- Grantmakers in Aging
- Pfizer Foundation
- Endowed Community Foundation
- Local, regional, State, and Federal governments

For example, Larimer County, CO established a Foundation on Aging with funds from n4a's \$250,000 Met Life grant. n4a provided technical assistance (e.g., planning, organizing, developing) Some use of the grant money went toward curriculum development and unique training for self-directed volunteer teams (SDVTs) of older adults.

The York County Community Foundation that was initially funded by a \$6 million grant from a local foundation developed York County, PA livable community's initiative. The grant helped fund an "Embracing Aging" study conducted by Partners for a Livable Community. It also helped fund a full time person in 2014 to manage the Livable Communities initiative for the Foundation. The local AAA was supportive of the York County Community Foundation taking the lead.

The Atlanta Regional Commission is the regional planning and intergovernmental coordination agency for a ten county area. They have a \$28 million budget and they are dedicated to unifying the regions collective resources. They developed a five-year strategic plan and all Regional Commission activities have a Lifelong Communities component. ARC received funding, totaling \$120,000 to continue its work with Community AGEnda, an initiative of Grantmakers In Aging (GIA) aimed at helping communities become more age-friendly, meaning great places to grow up and grow old. GIA, a national association of funders committed to improving the experience of aging in America, made the award with funds provided by the Pfizer Foundation. The Atlanta region is one of five communities participating in Community AGEnda nationally. Although their Regional Commission is not actively seeking a WHO/AARP age friendly designation, the city of Atlanta that is within the region has applied to become a WHO Age-Friendly City.

Other potential financial and technical resources that were identified from various sources include:

- Arts and Humanities grants for community engagement
- NIH Administration on Community Living and Aging
- Centers for Disease Control and Prevention
- Local community foundations
- Research and Development organizations
- Health Foundation of Southern Florida (for Miami/Dade County)
- Virginia Piper Charitable Trust (for communities in Arizona)
- Chamber of Commerce Foundation

The GIA April 13, 2015, webinar “Sustainable Changes to Make Your Community Age-Friendly: What’s Possible?” suggested the following regarding sustaining an age-friendly community:

- Identify funders that go beyond traditional partners who may not be focusing on the older adult population and engage them in supporting the improvement of the lives of older adults
- Funders were receptive to assisting with community engagement; reducing social isolation; establishing park fitness zones; developing a checklist and toolkit for local governments in “making your community work for all ages;” intentional conversations for attitude and behavioral changes; developing a community for all ages recognition program; identifying pilot sites to try out new programs
- Creating a lifetime community district
- Developing a Certified Technical Park Plan which includes diversifying housing options for staff of the Technical Park as well as seniors, i.e., intergenerational housing. Also attracting older entrepreneurs and older artists. Housing incorporates universal design and accessibility requirements
- Identifying ways to have funding sources get a positive outcome (co-investment). Important to measure performance
- Projects should ensure benefits to low income and diverse populations.
- Funders need to see how they can leverage their assistance

Partnerships

As part of the study, partnerships that communities developed to promote AF/LC were explored.

In the past, the Federal Government had been a collaborative partner in many senior related programs. For example, partnerships between the federal government and local and state governments have successfully produced thousands of affordable housing units. Unfortunately, federal monies are not as easily available to communities. Creation of public/private partnerships is important for communities to achieve age friendly goals. Communities are now looking for traditional and non-traditional partners.

Listed below are some community examples of partnerships.

Larimer County, CO

- Larimer County's Office on Aging partnered with the non-profit Foundation on Aging (FOA) and formed the Partnership of Age-Friendly Communities (PCFA). The PCFA's Steering Committee is comprised of representatives from a variety of concerned organizations and initiatives intended to improve livability for seniors in Larimer County

York County, PA

- Penn State York County and Osher Lifelong Learning Institute have partnered with the Foundation taking the lead in creating an age-friendly York County
- The Embracing Ageing program is connecting with businesses, organizations, and school districts throughout York County through a partnership with York Jewish Community Center's Diversity Program.
- n4a's Partners for a Livable Community helped York County develop a blueprint for action as part of their Livable Communities Collaborative

Philadelphia, PA

Age-Friendly Philadelphia/Corporation for Aging (PCA) seeks to create Aging Experts and Ambassadors to:

"Bring" people into the aging world

- Panels at events
- Share resources - grants and articles
- Inviting into new collaborations

Get Structures Integrated

- Serving on other Boards
- Bringing partners into GenPhilly

- Age-Friendly Philadelphia looked outside of traditional aging groups to bring together new partners to facilitate innovative collaborations, such as GenPhilly
- GenPhilly created a network of 400+ professionals in their 20s and 30s who work in a wide range of disciplines and are working to change stereotypes about aging. They are also asking themselves and their peers "what kind of city do I want to grow old?" and "How can I get there while helping the current population of seniors?"

Boston, MA

The City of Boston, has begun the 5-year process of becoming a WHO recognized Age Friendly City and has partnered with:

- AARP for staffing and technical resources
- UMass Boston Gerontology Institute (research arm)

Berkshire County, MA

Berkshire County Age-Friendly Vision 2020 established a Task Force:

- The task force is a collaboration between the Berkshire Regional Planning Commission and Home Instead Senior Care in conjunction with Berkshire County Boards of Health Association; municipal Councils on Aging (e.g., Williamstown, Adams, Great Barrington and Pittsfield); Be Well Berkshires; Mass Council on Aging; Berkshire Health Systems; and Elder Services of the Berkshires
- Each of 32 municipalities has a Council on Aging and a Board of Health that are partners in the Age-Friendly Berkshire County

Lessons Learned/Challenges

The following is a summary of the summer study's panelists' lessons learned and challenges:

Lessons Learned:

- Celebrate small victories
- Have achievable goals
- Appreciate the value of volunteers
- Need a person to direct the program
- Need a "Champion" for age-friendly community
- Infuse aging issues into all things
- Raise awareness of communities assets and liabilities
- Need the right people around the table
- Prioritize one issue at a time
- Collaborate with multiple organizations for greater impact
- Bring passionate decision-makers to the table to effect change
- Be a dot connector, not a dot collector
- Need support from the top elected official
- Reach out to non-traditional partners

Challenges:

- Building an Advisory Board
- Engaging grassroots participation
- Fundraising for projects after development of an action plan
- Building partnerships
- Continuing to build on the momentum
- Getting involvement of business community

AARP Livability Index

Shannon Guzman, AARP Public Policy Institute, reported on the AARP's Livability Index (L.I.). The L.I. is the first on-line tool that is accessible to the public and measures communities down to the neighborhood level. "It scores every neighborhood and community in the U.S. for the services and amenities

that affect people's lives the most." AARP worked with a 30 member technical advisory committee with policy and data analysis expertise, conducted focus groups and provided questionnaire surveys to create the measurement tool. The national survey had 4500 respondents aged 55+ who reported on the aspects of their communities that are most important to them. The L.I. measures 60 indicators spread across seven categories of livability: housing, neighborhood, transportation, environment, health, engagement, and opportunity. There are 21 indicators at the neighborhood level.

The AARP goal is to "help community leaders and individuals identify gaps between what people want and need and what their communities provide." Livability scores for a selected neighborhood, city, county or state ranges from 0 – 100. Category scores also range from 0-100. To date, the highest score is 75. Most communities fall within the 50-60 range. MC's total score is 59. The individual categories are more important than the total score. MCs lowest score was in Affordable Housing (37%). MC's rating on housing options was high but it doesn't differentiate between rental and owner housing.

Conclusion

The Summer Study provided a wealth of information for MC to learn from in terms of different approaches to AF/LCs; lead organizational entities/leadership positions; key activities and focus areas; types of resources; types of partnerships; lessons learned and challenges, all of which couldn't possibly be covered in this report. We hoped to provide sufficient information to give readers and decision-makers a flavor of the various approaches. Key findings are that every jurisdiction had a designated organizational entity; a dedicated high-level position to lead the AF/LC program; an action or strategic plan; a task group or advisory board comprised of different sectors of the community; diversity of resources, and partnerships. The recommendations in this report are primarily based on these findings.

To paraphrase Stephanie Firestone, n4a, most communities developed without considering the factors of access and inclusion, and therefore have little to no integration between housing, transportation, and the built environment. Hence, there is currently a paradigm shift from focus on delivery of benefits to individuals (downstream approach) to a community-wide (upstream) approach. The community-wide goal is to change older adults' broader physical and social environments to enhance their capacity to function optimally in their own homes and communities.

Finally, the information in this summer study will help inform the December 2015 County Executive's Summit on Aging.

RECOMMENDATIONS

The bullets below provide recent relevant activities as related to age-friendly communities for those who will be considering these recommendations, i.e., initially COA and on COA's approval, it will be provided to the County Executive and County Council:

- In 2012, The County Council adopted the Commission On Aging (COA)-developed "Senior Agenda: A Community for a Lifetime" which described seven domains and associated actions that are critical to support a community for a lifetime.
- The COA 2014 Summer Study on "The Need to Improve Advocacy for Older Adults in Montgomery County Planning" included recommendations specifically related to the WHO/AARP Age-Friendly Cities/Communities and were endorsed by COA (see Background Section).
- January 21, 2015, Judy Levy, COA Chair, made a presentation to the County Council's Health and Human Services Committee on the 2014 Summer Study recommendations.
- January 23, 2015, George Leventhal, Council President, sent a memo to Uma Ahluwalia, Director, Department of Health and Human Services, requesting the Department to contact the World Health Organization (WHO) to determine what is needed for Montgomery County to participate and receive the WHO designation and develop a preliminary plan on how the County would proceed. The response to that memo is due September 24, 2015.
- The 2015 Summer Study on Age Friendly/Livable Communities did not have as one of its objectives, to endorse any one approach. However, the recommendations below would align with a WHO/AARP Age-Friendly County approach, should a decision be made to go in that direction.
- The County Executive's Summit on Aging will be conducted in December 2015. The COA approved recommendations will be provided to the County Executive's Summit on Aging for information and consideration. In addition, any actions based on the approved recommendations should take into consideration the outcomes of the Summit.

Recommendations:

The summer study noted that the communities that were part of the Age Friendly/Livable Communities (AF/LC) Summer Study had a full time paid Executive Director, Coordinator, Manager, or another high-level position solely devoted to developing and implementing an Age Friendly/Livable Communities 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, health care providers, and other stakeholders. And, they typically develop a strategic plan or action plan as a framework, and for evaluation and accountability.

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 ² (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.

² 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 Manger. Not only does the Advisory Board have broad based representation, it takes a broad view to address AF/LC policies and programing 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.

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, where appropriate, 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.

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 COA's 2014 Summer Study Report 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.

APPENDIX A

References List

AF/LC Summer Study References List

The following references are provided in alphabetical order and are relevant to the AF/LC summer study. Links to websites or documents are provided, if available.

General References:

AARP Public Policy Institute, Age-Friendly Communities Tool Kit
<http://www.aarp.org/livable-communities/network-age-friendly-communities/>

AARP Public Policy Institute Livability Index
<https://livabilityindex.aarp.org>

Age-Friendly DC
<http://agefriendly.dc.gov>

American Planning Association Aging in Community Policy Guide, July 2014
<https://www.planning.org/policy/guides/pdf/agingincommunity.pdf>

Gerontological Society of America, Public Policy & Aging Report, "Making a Home in the City: The Age-Friendly Community Movement," Volume 25, Issue 1, Winter 2015
<http://ppar.oxfordjournals.org/content/25/1.toc>

Grantmakers in Aging (GIA) webinar on "Sustainable Changes to Make Your Community Age-Friendly: What's Possible?," April 13, 2015
<http://www.giaaging.org/programs-events/funders-for-age-friendly-communities/webinars/>

Grantmakers in Aging (GIA) webinar on "Finding the Best Lead Agency to Make Your Communities Age-Friendly," July 9, 2015
<http://www.giaaging.org/programs-events/funders-for-age-friendly-communities/webinars/>

Montgomery County MD A Community for a Lifetime: The Senior Agenda
https://www.montgomerycountymd.gov/exec/resources/files/senior_agenda.pdf

Montgomery County, MD, Senior Summit, November 20, 2009
<http://www.montgomerycountymd.gov/senior/summit.html>

Montgomery County MD Commission on Aging 2014 Summer Study on "The Need to Improve Advocacy for Older Adults in Montgomery County Planning"
[http://www.montgomerycountymd.gov/HHS-Program/Resources/Files/2014mocoplanningsummerreport\(1\).pdf](http://www.montgomerycountymd.gov/HHS-Program/Resources/Files/2014mocoplanningsummerreport(1).pdf)

National Association of Area Agencies on Aging (n4a) "Making Your Community Livable: What's Working!"

<http://www.n4a.org/files/n4aMakingYourCommunityLivable1.pdf>

Towson University, Center for Productive Aging report on "Imagining an Aging Future for Montgomery County, MD," May 2007

http://www.montgomerycountymd.gov/senior/resources/files/18_phase_i_strategic_plan.pdf

World Health Organization (WHO) Age-Friendly Cities Program Checklist of Essential Features of Age-Friendly Cities

http://www.who.int/ageing/publications/Age_friendly_cities_checklist.pdf

References for Summer Study Represented Communities:

Atlanta, GA, Atlanta Regional Commission (ARC) Lifelong Communities

<http://www.atlantaregional.com/aging-resources/overview>

Berkshire County, MA, Age-Friendly Vision 2020 Initiative

<http://www.esbci.org/BerkshireSeniorOnline/BSO2015/Aug2015.pdf>

Boston, MA, Age-Friendly Boston

<https://agefriendlyboston.wordpress.com>

Larimer County, CO, Partnerships for Age-Friendly Communities in Larimer County

<http://www.foalarimer.org/PAFC/partnerships/lcc-workshop-presentations>

<http://www.foalarimer.org/about-foa>

Philadelphia, PA, Area Agency on Aging's Philadelphia Corporation for Aging

http://www.pcacares.org/pca_aa_Landing.aspx

Philadelphia, PA, GenPhilly

<http://www.genphilly.org>

York County, PA, York County Community Foundation "Embracing Aging: Changing the Perceptions of Aging"

<http://www.yccf.org/aging.asp>

APPENDIX B

Participants

**June 23, June 30, July 7, 2015
Summer Sessions**

Commission on Aging Commissioners/(Session dates):

Joanne Balkovitch (6/23, 6/30, 7/7)
Sue Guenther (6/23)
Charles Kauffman (6/23, 6/30, 7/7)
Miriam Kelty (6/23, 7/7)
Judith Levy (6/30, 7/7)
Leslie Marks (6/23, 6/30, 7/7)
DaCosta Mason (6/30)
Jerry Morenoff (6/23)
Isabelle Schoenfeld (6/23, 6/30, 7/7)
Revathi Vikram (6/23, 6/30, 7/7)
Grace Whipple (6/23)
Syed Yusaf (6/23, 6/30)

Guests:

David Denton (6/23, 6/30)
Sarah Gottbaum (6/23, 6/30, 7/7)
Chris Heald (6/23, 6/30)
Karen Maricheau (6/30)
Mona Negm (6/23, 6/30)
Doug Newton (6/23, 6/30, 7/7)
Dick Pavlin (6/23)
David Richman (6/23)
Beth Shapiro (6/30)

Montgomery County Staff

Pazit Aviv (7/7)
Odile Brunetto (6/23, 6/30, 7/7)
Austin Heyman (6/23, 6/30, 7/7)
Jay Kenney (6/23, 6/30))
Dennis Linders (6/23)
Pamela Lockett (6/23, 6/30, 7/7)

APPENDIX C

Questions for Presenters

**June 23 and June 30, 2015
Summer Sessions**

Montgomery County, MD Commission on Aging Summer Study
Questions for June 23, 2015 Summer Study Session Presenters

1. Brief description of your community's program- e.g., how are the n4a's ten key strategies applied to the operational aspects (e.g., housing, health & wellness, transportation, recreation, employment, etc.) of your livable community?

2. How and when did you get started?
 - a. Government sponsored initiation
 - b. Grass roots community
 - c. Community Institutions
 - i. Colleges/University
 - ii. Foundations
 - iii. Non profit
 - iv. Other

3. Organizationally, who's in charge of the age-friendly programs and how is it structured?

4. What were your greatest challenges (for example)
 - a. Funding
 - b. Gaining support
 - c. Organizing (person in charge)

5. What is the cost of creating an "age friendly community" in your jurisdiction?
 - a. Identify source(s) of non-government funding
 - b. Do you have government funding? Local, State, Federal-how much

6. Partnerships and collaborations (e.g. academia, research organizations, businesses, local media, community foundations, other)
 - a. Identify
 - b. Roles
 - c. Coordination

7. Evaluation: How do you determine what is working and what is not?

8. Lessons Learned and Strengths/Challenges

Montgomery County, MD Commission on Aging Summer Study
Questions for WHO-AARP Age-Friendly Communities Presenters
June 30, 2015, 9:30-11:30 am

1. Brief description of your community's program- e.g., how are the WHO-AARP domains incorporated into your age-friendly community?
2. How and when did you get started?
 - d. Government sponsored initiative?
 - e. Grass roots community initiative?
 - f. Community Institutions?
 - i. Colleges/University
 - ii. Foundations
 - iii. Non profit
 - iv. Other
3. Organizationally, who's in charge of the age-friendly programs and how is it structured?
4. What were your greatest challenges (for example)
 - d. Funding
 - e. Gaining support
 - f. Organizing (person in charge)
5. What is the cost of creating an "age friendly community" in your jurisdiction?
 - a. Identify source(s) of non-government funding
 - b. Do you have government funding? Local, State, Federal? How much?
6. Partnerships and collaborations (e.g. academia, research organizations, businesses, local media, community foundations, other)
 - c. Identification of
 - d. Roles
 - e. Coordination
7. Evaluation: How do you determine what is working and what is not?
8. Lessons Learned and Strengths/Challenges?

Montgomery County, MD Commission on Aging Summer Study
Questions for Montgomery County Presenter
June 30, 2015, 9:30-11:30 am
Montgomery County Council Office Building, 5th Floor Conf. Rm.

1. Brief description of Montgomery County's Community for a Lifetime program- e.g., how are the Senior Agenda areas incorporated into government departments performance plans?
2. Organizationally, who has the lead for age-friendly programs in the County and how is it structured?
3. How do the different departments including the M-NCPPC Planning Dept. for Montgomery County coordinate with each other around actions/policies/programs related to older adults.
4. How does the County government engage grass roots organizations, the public, colleges/universities, community foundations, non-profit orgs, others, in supporting a Community for a Lifetime?
5. What are your greatest challenges (for example) in making progress to support MC as a Community for a Lifetime
 - a. Funding
 - g. Gaining support
 - h. Organizing (person in charge)
6. Partnerships and collaborations (e.g. academia, research organizations, businesses, local media, community foundations, other) - How are partners and collaborators identified and coordinated with?
7. What is the evaluation process to determine effectiveness of age-friendly programs?
9. Lessons Learned?

APPENDIX D

Biographical Sketches of Summer Study Moderators and Presenters

**Biographical Sketches for Summer Study
Moderators and Presenters**

June 23, 2015 Session:

Cathy Bollinger (York County, PA)

Cathy joined York County Community Foundation in February 2014 in the then newly created position of Managing Director of Embracing Aging. In this role, she provides strategic direction and leadership designed to make the York County community a great place to age. She advocates for understanding and increased application of age-inclusive thinking, and convenes community influencers and implementers who have the capacity to affect broad change across all aspects of how a community supports multi-generational livability. Cathy is a catalyst for ideas to lead change for reducing barriers to aging well in the areas of attitudes and culture, community engagement, health & wellbeing, housing, and transportation. She oversees the work of the Hahn Home Fund of the York County Community Foundation, which funds EA's strategic grant making to non-profit organizations and operations. Cathy most recently served as the Director of Diversity and Organizational Development for the York Jewish Community Center where she conceived, developed, and facilitated award-winning workshops, trainings and programs to address personal biases and the impact of words and actions around those biases. Cathy also served in a variety of management positions for 16 years at the The Pfaltzgraff Company, a 150-year-old, \$100 million manufacturer, wholesaler and retailer of consumer products. While there, she was chosen to serve on a select team of 20 employees from among the 2,000 employee workforce to work closely with world-class consultants to re-engineer business processes across the entire supply chain.

Stephanie Krone Firestone (n4a)

Stephanie is Director of Livable Communities at the National Association of Area Agencies on Aging (n4a). In this capacity, she works with Area Agencies, cities and counties around the country to create multi-stakeholder partnerships, identify priorities, develop action plans and enhance their capacity to make their communities great places to grow up and grow old. Stephanie has worked as an independent consultant to communities around the country as they plan for rapidly aging populations. She speaks at conferences on livable/age-friendly communities and writes Age'n Community, a blog on senior mobility at mobilitylab.org. Stephanie has over twenty years of experience working in the public sector advancing environmental policy, planning and mediation, as well as civic engagement, both at the local and national levels. She has worked overseas promoting sustainable cities, including preparing the State of Israel for its participation in the World Summit on Sustainable Development and presenting at the U.N. General Assembly in New York City. Stephanie is involved in her local community as a hospice volunteer and a volunteer birth doula. She is married with three girls and lives in North Bethesda, Maryland. Stephanie earned a Master of Urban & Environmental Planning from the University of Virginia, and a Bachelor of Communications from the State University of New York.

Shannon Guzman (AARP Public Policy Institute)

Shannon is a Policy Research Senior Analyst, AARP Public Policy Institute and works primarily on livable communities issues. She conducts research and analysis to inform community members and assist local decision makers in their efforts to support residents who want to age in place. She has coauthored publications on community livability, housing, and transportation; analyzed national crash statistics; and assisted in the development of community assessments. As a member of the Livability Index core team, Ms. Guzman's planning and communications expertise contributed to all aspects of Index development, from survey research to the tool's final design and functionality. Her major contributions include analysis of data from the community preference survey, research and selection of index metrics and policies, co-authoring Index-related research publications, and assisting in the conceptual designs of the Index website. Prior to joining AARP, Ms. Guzman was a senior planner for the Maryland National Capital Park and Planning Commission, in the Prince George's County Planning Department, where she worked on long-range, comprehensive planning projects focused on the implementation of smart growth, neighborhood revitalization, and transit-oriented development policies and strategies for several communities.

Katy Mason (Larimer County, CO)

Katy received a bachelor's in Health Education from the University of Illinois and a Gerontology certificate from Colorado State University. For the past 18 years she has worked at the Larimer County Office on Aging as a Program Coordinator. Her career is devoted to helping older adults remain independent in their own homes. She has lived in Fort Collins, Colorado for 33 years. In her free time, she enjoys recreating in the outdoors with her husband.

Lynda Meyer (Larimer County, CO)

Lynda is a licensed clinical social worker who moved to Colorado in September of 2013 to take the position of Program Manager for the Larimer County Office on Aging. Ms. Meyer has extensive experience in the field of aging and has dedicated her 30+ year career to working on improving and enhancing the lives of seniors through her work. Prior to moving to Colorado, Ms. Meyer was the Senior Services Coordinator for the Municipality of Anchorage, and staff liaison to Anchorage Senior Center. Lynda has worked as the statewide outreach and education coordinator for the Alzheimer's Association, Alaska Chapter, as well as manager for senior services for the largest mental health clinic in Alaska. Lynda has been witness to profound changes in long-term services and supports including more home and community based services. Her current position allows her to direct services that really make a difference. Lynda graduated from Colorado State University with a Bachelor's degree in social work and went on to get her Master's degree at the University of Alaska Anchorage. She has 2 grown daughters and just became a grandmother.

June 30, 2015 Session:

Mary Tonore Blumberg (Atlanta, GA)

Mary is the Program Manager for Strategic Planning and Development for the Atlanta Regional Commission, Aging and Health Resources Division. The Atlanta Regional Commission (ARC) serves as the planning, development and intergovernmental coordination agency for the ten-county Atlanta Region. ARC's purpose is to serve the citizens, local governments and the broader regional community by providing services, support and leadership on issues that require comprehensive regional solutions. Mary is responsible for overseeing activities within ARC's Lifelong Community Initiative, which promotes diverse housing and transportation options, opportunities for healthy living, and convenient access to basic services. In addition she oversees strategic planning for the Division which includes the Area Plan on Aging. She previously worked at the Louisiana Governor's Office of Elderly Affairs serving as the Director of Home and Community Based Services. She has a BS and MS from Louisiana State University in Nutrition and is a Registered Dietitian.

Kate Clark (Philadelphia, PA)

Kate is Planner for Policy & Program Development at Philadelphia Corporation for Aging (PCA), the Area Agency on Aging for Philadelphia and an Atlantic Philanthropies Health and Aging Policy Fellow. Since joining PCA in 2008, she has worked to develop two nationally award-winning programs - Age-friendly Philadelphia and GenPhilly (Generation Appreciation Philadelphia). Prior to moving to Philadelphia, she initiated and managed the City of Syracuse's first public art program; directed the City of New York's Historical Signs Program; and published a paper as a Fulbright Scholar on public-private partnerships and public space management. She has a Masters of Public Administration from the Maxwell School at Syracuse University and a Bachelor of Art in Geography and Archaeology from Clark University.

John (Jay) Kenney (Montgomery County, MD)

Jay's professional background and expertise includes over 30 years of experience in providing and administering services to older adults and people with disabilities. In July 1995, he was appointed chief of Aging and Disability Services in the newly created Department of Health and Human Services. He also serves as the Chair of the County's Emergency Management Team's Community Services Group which is responsible for Mass Care, Shelter, Housing and Human Services during disaster events. For over 10 years Jay co-chaired the Department's Ethics Review Committee. Prior to joining the County, Jay was the associate director of Social Work at the Washington Hospital Center and a member of the hospital's Bio-Ethics Committee. He currently serves on the Advisory Board of the Center on Global Aging, affiliated with the National Catholic School of Social Service, The Catholic University of America. Additionally, he serves on the Board of Directors, Adventist Physical Medicine and Rehabilitation Hospital. His academic degrees include a B.A. (Psychology)

from Southern Illinois University, Masters of Arts (Theology), Masters of Social Work and Ph.D. (Social Work) from The Catholic University of America and an M.B.A. from Southeastern University.

Bobbie Orsi (Berkshire County, MA)

Bobbie has lived and worked in Berkshire County her entire life. She currently is the Director of Community Relations at Home Instead Senior Care, located at 66 Wendell Ave in Pittsfield. In her role at Home Instead, Bobbie identifies the needs of aging adults and develops programs that are essential to help people to actively age at home in their community. Bobbie holds a Bachelor of Science degree in Nursing from the University of Massachusetts, a Master's in Health Promotion from Nebraska Methodist College, and has more than 40 years of nursing, community health, and wellness experience. Prior to her work at Home Instead, Bobbie developed the At Home Program at Berkshire Place, and as Director of Community Health and Wellness with Berkshire Health Systems, she led the Occupational Health Department, the Wellness at Work Program, and the outreach efforts at BHS. Bobbie is an active volunteer of the Alzheimer's Association and in her work with Home Instead, she has developed and implemented new Alzheimer's education and support programs across the county. She has served as a member of the City of Pittsfield Board of Health since its inception 12 years ago, and most recently, as Chair. Bobbie currently leads the Berkshire County Age Friendly Community Vision 2020 Initiative, along with a broad group of community partners.

Christy Page (Maryland AARP)

Christy is the AARP, Maryland, Associate State Director, Outreach. She joined the AARP Maryland team in April 2013 as the Associate State Director focusing on Outreach. In this position, Ms. Page helps individuals, families and communities to unleash their energy towards positive social change through service and learning. Before coming to AARP, Christy developed an aging-in-community initiative in Baltimore City, coordinated bereavement services for hospice patients and their families, launched an educational initiative for military families overseas, and volunteered as a policy advocate on older adult issues. She enjoys camping and quilting. Christy earned a Social Work and Health Administration/Policy Bachelor of Arts at the University of Maryland Baltimore County, a Master of Social Work at the University of Maryland at Baltimore, and a Master of Arts in Management of Aging Services at UMBC's Erickson School.

Emily K. Shea (Boston, MA)

Emily has been serving as Commissioner on Affairs of the Elderly for the City of Boston since April 2011 and was reappointed by Mayor Martin J. Walsh in January 2014. The Commission serves as Boston's Area Agency on Aging and Boston's Council on Aging. Prior to her work at the City, Ms. Shea's work focused on meeting the needs of older adults in Boston, first in her role as the Executive Director of the Robert Wood Johnson funded initiative the Boston

Partnership for Older Adults, and then in her most recent role as Director of Elder Services for Action for Boston Community Development (ABCD), Boston's anti-poverty agency. Before coming to Boston, Ms. Shea spent 6 years as the Executive Director of Windsor House Adult Day Health programs in Cambridge, Somerville and Framingham. She also served as the President of the Massachusetts Adult Day Services Association. Ms. Shea received her MSW, MPH and Certificate in Gerontology from Boston University and her BA from St. Mich

APPENDIX E

Minutes

Summer Study Sessions June 23 and June 30, 2015

Minutes
Commission on Aging
Age-Friendly/Livable Communities Summer Study
June 23, 2015

Purpose of Summer Study: To explore the various approaches communities are taking to make their communities “livable” and “age friendly.” To specifically look at communities that are pursuing aging in community programs such as the WHO/AARP Age-Friendly Cities certification, the n4a Livable Community Learning Collaborative and Strategies. Also, to learn about the AARP Livability Index and it’s criteria. The Summer Study will research how communities are implementing these various programs, identify threads of similarities and areas of differences and compare these programs to The Senior Agenda: Montgomery County’s Community for a Lifetime..

Another summer study goal is to provide background information for the Montgomery County County Executive’s Summit on Aging to be held on December 5, 2015. The following additional resource documents were sent to the study participants; link to the AARP Livability Index information, n4a Making Your Community Livable, American Planning Association Policy Paper on Livable Communities, Gerontology Society of American Public Policy & Aging Report.

The first of three sessions of the Summer Study focused on Larimer County, CO and York County, PA and how those communities used the n4a Strategies to implement an Age Friendly Community. In addition, we learned about the AARP Livability Index and how Montgomery County fares in the Index evaluation. This session also provided information about n4a Livable Communities by Program Director, Stephanie Firestone.

The panel of presenters was: *I think we should include their titles*
Stephanie Firestone, Moderator and n4a presenter
Cathy Bollinger, York County, PA
Lynda Meyer and Katy Mason, Larimer County, CO
Shannon Guzman, AARP

n4a: Stephanie Firestone

Background Information: Livable Communities, An Overview

Elements of a Livable Community:

- Ensures social supports are in place
- Ensures people have affordable housing choices that are appropriate for their need at different ages and abilities
- Enables people to get around by providing transportation options and designing appropriate public spaces
- Provides basic amenities like a grocer and pharmacy nearby so people don’t need to get into a car to meet their daily needs

- Fosters social interaction and Community involvement through the creation of intergenerational public spaces and opportunities for engagement.

Most communities developed without considering the factors of access and inclusion, and therefore have little to no integration between housing, transportation, and the built environment.

We are experiencing a paradigm shift from focus on delivery of benefits to individuals (“downstream” approach), to a community-wide (“upstream”) approach. The community-wide goal is to change older adults’ broader physical and social environments to enhance their capacity to function optimally in their own homes and communities. As people age, they become more reliant upon their immediate environment for achieving a fulfilling existence in old age.

Gerontological Society of America (GSA) Special Issue: White House Conference on Aging 2015: Three proposed categories that differentiate initiatives in terms of their primary activities through which they intend social and physical environments to promote aging in place/community:

1. Community Planning Approaches: Explicit frameworks. Top-down model involving needs assessments and rational planning processes (e.g., World Health Organization (WHO) Agee-friendly cities). Primary focus on domains of action (e.g., transportation/safe mobility, housing and UD; civic engagement and social participation; access to services and supports) more so than the process of bringing together a variety of actors to lead community-level change.
2. Support-focused approaches: Particular attention to collaboration for the purpose of enhancing community-wide networks of informal and formal sources of support (e.g., Villages and NORCS, which emphasize promoting older adults’ access to services and reducing social isolation which emphasize promoting older adults’ access to services and reducing social isolation through efforts to transform social relationships at the community level.
3. Cross-sector partnership approaches: Prioritize collaboration among different organizations and individuals to expand the range of sectors focused on aging. Focus on bringing together entities from a wide range of sectors to develop and implement locally based action plans concerning aging which can lead to a variety of proximal objects including zoning revisions as in 2 and creation of support for neighbor-helping neighbor modes as in 2.

Important Issues to focus on and consider: A few factors seem critical in considerations at the stage where MoCo is at right now.

1. Cross-sector collaboration: Where mutual benefits are not recognized until coming together. Example: Santa Fe recognized the need to advocate for eliminating impact and permit fees and minimize

permitting hurdles for guest houses/Accessory Dwelling Unit's in the city. They realized this would accomplish a number of positive planning principles for the city by removing barriers to innovative solutions and to help with housing affordability and greater housing options.

- a. Allowing homeowners to have someone live on-site, or vice versa
 - b. Allowing a family to move an aging member on-site
 - c. Helping with housing affordability in the city over time
 - d. Providing enhanced options for a public that is increasingly searching for both
 - e. Encouraging an incremental and less controversial way to increase density in the city, thereby making better use of existing infrastructure of roads and utilities
2. Inclusiveness: "The right to the city" implies two main rights for inhabitants:
- a. Right to full and complete usage of the city (i.e. appropriate urban spaces)
 - b. Right to participate centrally in decision making surrounding the production of urban spaces
 - i. Racial and ethnic senior populations must be at the table (i.e. in Santa Fe neighborhood surveys)

GSA Special Issue posed a conceptual model for framing inclusion through the promotion of:

1. Population inclusion in all facets of life
2. Environmental inclusion (programs & policies that improve older residents' physical, material and social environment and enable them to age successfully)
3. Sectorial inclusion: the use of a broad-based community collaboration model as a key mechanism to achieving an age friendly community.
4. Prove outcomes

Comprehensive planning for aging-. Atlanta Regional Commission instituted a complete system change to make Livable Communities a focus and priority.

Need to balance community assets: public/private sector collaboration. Identify assets:

- Human resources: including older volunteers
- Physical resources
- Identify champions for age friendly policies and programs
- Develop relationships between stakeholders
- Commitment from the top
- Identify who is benefiting from impact of grant funding, need to plan for end of grant as well, demonstrate cost savings as an investment in implementing AF communities

Identify opportunities for implementing age friendly community actions.

- Key Assets
- Planning Process
- Pedestrian Initiatives
- Dementia Friendly Community
- New Urbanism Developments
- Take advantage of livability in every project and initiative

Age Friendly cities and communities, not just in cities because people want to age where they are, i.e., suburban areas. For example, need to address better walkability in suburban areas

Need to identify where changes can be made in the community

- Social change is slow: create short term & long term goals
- Think regional solutions
- Reflect on fast changes such as Uber

Larimer County and York County are examples of innovative approaches to support livable communities.

Larimer County, CO: Speakers, Lynda Meyer & Katy Mason

Getting Started:

1. Larimer County is a large county that is both urban and rural
2. Created a “Partnership for an Age Friendly Community (PAFC) across non-traditional sectors
3. Held a stakeholder meeting and then a larger community summit
 - a. Wanted to keep initial stakeholder meeting small, can get more done in smaller groups. Need to reach out to the right people.
 - b. Stakeholders included government officials, aging champions, Mayor of Fort Collins, large city, county commissioners, developers, business partners, and chamber of commerce. Need to be deliberate in who to invite.
 - c. Had mixed results in getting the right people to the table: i.e. government officials got involved as did developers. Business community involvement greater challenge.
4. The Summit (May 2015) – 250 local and national speakers
 - a. Selected 4 priorities at Summit
 - i. Health & Wellness: Conducted walkability studies as part of Health & Wellness Group
 - ii. Transportation: Travel training part of transportation priority
 - iii. Culture of Aging Group
 - iv. Volunteer Teams to report on Age Friendly Community
 - b. Held a series of forums (these were held prior to the n4a technical assistance grant).
 - i. Promoting aging and what it means to grow older in Ft. Collins and Larimer County

- ii. Promote dialogue about age friendly issues and fight stereotype about aging. Economic contribution of seniors
- iii. Need for more intergenerational activities

Structure:

1. Created a Foundation on Aging from a grant from n4a and created a framework and timeline for action plan (n4a received a \$250K grant from Met Life and they provided technical assistance to Larimar County and other jurisdictions).
2. Important to build individual relationships but it takes time.
3. One of the challenges was to develop relationships with businesses

Actions:

- a. Use wisdom and contributions of older adults. Created training program for volunteers.
- b. Virtual online training for volunteers.
- c. Held a series of workshops at Senior Centers with the focus of “Growing older in our county.”

Additional actions and challenges

- a. Partnered with University of Colorado Center for Public Deliberation where students helped promote a dialogue on community issues including one from PAFC. Great intergenerational activity.
- b. n4a Grant was for technical assistance, not financial assistance
 - i. Planning
 - ii. Organizing
 - iii. Developing tools
- c. Sent e-newsletter to summit participants
- d. Showed a videotape of Summit on County public access cable station
- e. Held a candidate forum to promote senior issues to those running for office
- f. Have not yet formally evaluated programs
- g. Program is volunteer-driven. Volunteers trained, used grant to fund curriculum development.
- h. Currently have self-directed volunteer teams (SDVTs) of older adults to implement programs; housing, mobility, health & wellness, culture of aging. Three more volunteer teams about to launch.
- i. Need a staff person to direct program.
- j. n4a used their grant to hire a consultant to develop uniquely created training for Larimar.
- k. Need funding source to replace n4a grant to continue to implement program goal.

Lessons Learned/Challenges:

- a. Celebrate small victories and have achievable goals
- b. Appreciate the value of volunteers

- c. Need a staff person to direct program and basic infrastructure
- d. Need to infuse aging issues into all things, like Atlanta.
- e. Raise awareness of your community assets and liabilities

York County, PA: Cathy Bollinger

Managed by York County Community Foundation

34% of population in York County is 60+

York County is both urban and suburban

94% of residents are Caucasian, 6% African American

Goals:

1. Improve attitudes on aging by citizens in county
2. Increase acceptance of aging population as a part of the community
3. Remove barriers for seniors aging well in York County
4. Educate businesses about the benefits of seniors in the community and their role to enhance quality of life in York County

Mission: To create a vibrant community. Held focus groups to address, “What does it mean to be an age friendly community?”

York County Foundation was initially funded by a \$6million grant received from a local foundation (now \$8million). Grant helped fund an “Embracing Aging” study (\$38,000) done by Partners for a Livable Community. The grant helped fund a full time person in 2014 to manage the Livable Communities initiatives for the Community Foundation. Budget of \$100,000/year. Want to find additional funds to leverage. The AAA was supportive of York Community Foundation to take the lead.

Advisory Group: A 10 person advisory committee was formed that meets every 2 months. Committee reflects diversity in the community. Group comprised of: college professor, nursing home administrator, representative from AAA and AARP, geriatric case manager, retired judge, representative from the City of York, a bank representative and a health & wellness representative. Advisory committee has diversity in terms of race, religion, orientation, age.

Getting Started:

Early Priorities:

1. transportation
2. health & wellness
3. housing
4. culture change
5. civic engagement

Found five priorities too much to do at one time so started with promoting cultural change in terms of how seniors are viewed.

1. Staff and volunteers attend Chamber of Commerce meetings
2. Attend municipality meetings
3. Work with developers to promote universal design in housing
4. Had author of “Embracing Aging,” Ruth Garrett, come to speak.
5. Hired a research consortium to measure attitudes in York County. Will do the research again in five years.

Formed collaborations, e.g.,

1. Used the Self-Directed Volunteer Team model for training program in the community about aging bias.
2. Have partnerships across the community including municipalities, county administrators, developers, academia.
3. At the table with other senior entities, e.g., the Healthy York Coalition.

Lessons Learned:

1. Need right people around the table.
2. Need to prioritize to one issue at a time.
3. Need to collaborate with multiple organizations for greater impact.
3. Need to bring passionate decision makers to the table to effect change.
4. Be a dot connector, not a dot collector

AARP Livability Index: Shannon Guzman

The AARP Livability Index (L.I.) is their first on-line tool which is accessible to the public and measures communities down to the neighborhood level. The measurement tool can be accessed online through the AARP website. (aarp.org/livability index),

The AARP goal is to have local government officials and community members work toward livability. The AARP views the Livability Index’s seven domains as being a complement to the WHO/AARP Age Friendly Communities initiative. Fifty plus communities have made a commitment to do an assessment (the first phase) of the certification. These AFC entities look at the L.I. and identify challenges to be addressed.

There are 7 domains evaluated, scores range from 0 – 100. So far highest score is 75, Montgomery County’s total scores is 59. Most communities fall within the 50-60 range. The individual categories are more important than the total score. MCs lowest score was in Affordable Housing (37%). MC’s rating on housing options was high but it doesn’t differentiate between rental and owner housing. There are 21 indicators at the neighborhood level.

- AARP conducted focus groups and did questionnaire surveys to create the measurement tool. The national survey had 4500 55+ respondents.

- a. Worked with an advisory committee
- b. 5 year process:
 - i. assess
 - ii. plan
 - iii. implement
 - iv. evaluate
- c. Index scores shows weaknesses so community priorities can be set.
- d. Purpose: to provide warning signs in the community about achieving an age friendly community

Leslie Marks

Minutes
Commission on Aging
Age-Friendly Communities Summer Study
June 30, 2015

After an overview of the first session of the summer study, participants were asked to look at the materials that were distributed by the co-chairs of the study. Since participants were not likely to read all of the materials, the co-chairs asked individuals to be responsible for specific materials. Individuals should contact the co-chairs about the articles they would be willing to address.

Christy Page, Assistant State Director for Outreach at AARP Maryland, moderated the second session. Five panelists were asked to address what their communities were doing to become age-friendly communities.

Kate Clark, Age-Friendly Philadelphia Planning Department, Philadelphia Corporation for Aging

- 5th largest AAA in the country with over 700 employees
- 90% of the homes are row houses with steps
- The nonprofit corporations strategy is to look outside of aging and bring together new partners to facilitate innovative collaborations
- Not being a part of the government allowed it to look for other initiatives outside of government and seek to incorporate aging policies into other activities in the city
 - Worked with business improvement districts and community development corporations
 - Sought to bring other people into the aging world and share resources
 - GenPhilly
 - Network of 400+ professionals working to change stereotypes about aging and establish Philadelphia as a lifelong community for all residents of the city
 - Advocate among colleagues that what is good for seniors is good for all
 - Key features include interactive listserve, public events

Emily Shea, Commissioner, Commission of Affairs of the Elderly, Age-Friendly Boston

- Currently in the needs assessment stage
 - Engaging partners and groups
 - Following the WHO guidelines
 - Doing 20 structured listening sessions including 3 language specific sessions
- Joined WHO in 2013
- Two primary partners – University of Massachusetts and AARP

- Organization
 - Collaborative efforts managed by a full-time coordinator
 - UMass is contributing part-time researchers
 - AARP providing staffing and resources
- Challenges
 - Trying to build an advisory council
 - Engaging grassroots participation
 - Fundraising for projects after development of 3 year action plan
 - Building partnerships
- Strengths
 - Support from the Mayor
 - Many organizations in the community that may be participants
 - Example – In 2014 city made housing a priority and Mayor expressed interest in focus on senior housing and provided seat on housing planning committee for organization

Bobbi Orsi, Berkshire County, MA Age-Friendly 2020 Vision Director, Community Relations, Home Instead Senior Care

- Home in Stead is a non-profit with the mission of changing the face of aging in the population
- There are 32 municipalities in the county and area is primarily rural
- Each municipality has a Council on Aging and a Board of Health
 - Brought them together to determine what it would mean to be age-friendly community and how it could be achieved
- In 2014, developed survey based on AARP tool kit document, but personalized it
 - Received 2,500 responses (2% response rate)
 - Tried to create groundswell by creating a task force with 29 members
 - Created a resolution for Pittsfield to become an age-friendly city
- Accepted into WHO in 2015
- Looking at housing as first priority
- Already have a complete streets program across the county
- Challenges
 - Involvement of business community has been problematic
 - Young adults have been leaving the county
 - Need to find a “Champion” for age-friendly community

Mary Blumberg, Atlanta Regional Commission, Program Manager, Strategic Planning and Development, Area Agency on Aging

- Regional planning and intergovernmental coordination agency for a ten county area
- Dedicated to unifying the region’s collective resources to prepare the metro area for a prosperous future
- Lifelong Communities program provides a full range of options to residents, ensuring a high quality of life for all

- Three goals
 - Promote Housing and Transportation
 - Encourage Healthy Lifestyles
 - Expand Access to Services
- Funding
 - \$28 million budget
 - All activities have Lifelong Communities component
 - Developed a five year strategic plan
- Not actively working with WHO and AARP on age-friendly communities
 - The city of Atlanta, which is part of the Regional Commission, has applied to become a WHO certified age-friendly city
- Major challenge is continue to build on the momentum in the region

John Kenny, Chief, Aging and Disability Services, Department of Health and Human Service, Montgomery County, MD

DaCosta Mason

**Minutes
Commission on Aging
Age-Friendly/Livable Communities Summer Study
July 7, 2015**

The session focused on reviewing information gathered from the last two meetings.

7 Age Friendly Communities modeled on AARP/WHO , N4A and Montgomery County, that represented County, regional, rural and city populations were discussed.

In addition Miriam Kelty reviewed the Gerontological Society winter issue on this topic. Revathi Vikram summarized the American Planning Associations Policy Guide for Age Friendly Communities.

The following documents provide insights and policy guidelines.

1. AARP LIVABILITY INDEX
2. N4A Making Your Community Livable
3. American Planning Association Policy Guide for AFC
4. Montgomery County Senior Agenda. A Community for a Lifetime. The Senior Agenda
5. Gerontological Society of America. Public Policy and Aging Report.

Common Threads of the different approaches.

- The domains described were similar with change in focus depending on the nature of the community covered, i.e population (rural vs urban), economic make up, education and social structures.
- Support of educational institutions, i.e universities for research and leadership. (Portland, Oregon)
- Affirmation of need to integrate social and environmental resources. There is a need to educate people for a culture change in attitudes towards aging.
- Implementation of Project after the planning and organizing efforts.

Note: Evaluations of projects are yet to come as implementations are still new and in early stages.

- Major Federal efforts especially in Housing and Transportation are needed, including learning HOW to use what is already in existence.
- Regular collaborative meetings with partners need to be prioritized.
- Partners should include for profit, non- profit, university, medical schools and businesses with work force issues as well as those whose products are for Seniors.
- The Senior community must always have a seat at the table.

Features that MoCo applies.

-MC has a good foundation with active senior participation via the Commission on Aging, The Senior Agenda, the Senior Sub Cabinet and the strong support from the Executive and Legislative branches.

Discussion Suggestions

Resources and Partnerships:

- Look for Grants. Metlife and n4a have provided in kind or technical assistance or financial resources for individual projects in some communities.
- Candidates Forum on Senior issues prior to election cycle to alert politicians on the issues as well as see where they stand.
- Relationships with business partners is a challenge. Prioritize public/private partnerships.
- Include Leadership Montgomery networks for Professionals 30+ to intermingle several generations. Also tap into retired professionals and volunteers.
- Include developers to be part of planning team.

Leadership:

- Leadership in this initiative is an issue. Need to identify a leader whose sole responsibility is for keeping up the momentum and bringing the missing business communities to the table. As players keep changing the need for consistent leadership to keep relationships going is vital.
- It was discussed that a leadership role be someone outside of the Senior Subcabinet, perhaps in the County Executive's office, as the members of the Senior Subcabinet already have a very full plate. This person could lay out plans and coordinate with outside entities listed below.

Senior Sub Cabinet:

Discussions included the following.

- Including the Planning Dept of MNCPPC (they have a research division) at the table.
- Other entities that should be participating are
 1. Businesses who benefit from a growing senior population, such as hospitals, the medical community, and technology companies (abundant in our county)
 2. Developers, land use Attorneys, should be part of discussion through MNCPPC.
 - 3 The newly approved Economic Development Council with private/ public partnerships would be an asset.
 4. Select specific projects such as WALKABILITY, tying it to Transportation infrastructure.
 5. Intergenerational Planning
 6. Minimize silo approach and integrate the programs.

Commission on Aging:

- Spearhead a debate among potential candidates to discuss specific senior issues. Where they stand on them and what they would do about them if elected.
- Diversity in membership.
- Work at Culture Change in Ageism.

- Have a seat at the table as much as possible and look for opportunities. Important to have the right people in each situation.
- Policy change and funding are important.
- Look into collaboration with League of Women Voters on Senior issues.

Brainstorming Recommendations

1. Senior Subcabinet needs a leader across departments and bring private sector in as well.
2. The leader would be from the County Executives' office to lead the senior subcabinet to develop a plan and action steps.
3. A full time person needs to be in charge of WHO/AARP AFC process and report to County Executive. Privatization of efforts in the County for economic development could also be involved with this project/senior subcabinet.
4. Senior Subcabinet also needs info from outside of county government
5. Integration among departments of senior subcabinet/strengthens
6. Advisory Group for AFC have representation from partners to implement AFC/WHO/AARP.
7. County Stats is retooling the AARP survey for our County
8. Need more citizen input from listening groups in community, also involve those who are 40, 50 yrs of age and start now.
9. COA could be the Advisory Group for the AFC effort. Would need to include developers, business, etc. Could form a special COA Committee/task force. Need to have proper staffing for this.
10. Use liaisons to several groups
11. COA committees educate or advocate and recommend to the full COA
12. COA meets during the day; is this a barrier to engaging other partners?
13. COA needs more representation from business community
14. COA to better monitor implementation of Senior Agenda
15. Need a person to be in charge of AFC initiative in MoCo,; should have a seat at senior subcabinet. This person would reach out to universities, developers, etc. Should be the Executive Director of the effort.
16. Age-Friendly DC has Strategic Plan with each action item having an associated DC Department(s) and partner(s).

Top Recommendations:

1. Paid staff person, e.g., Executive Director, to be in charge of Community for a Lifetime age friendly initiative. Manage implementation and monitor progress of AFC initiative.
2. Reach out to the private sector, e.g., businesses, developers, universities for partnerships
3. Identify outside resources to support implementation of AFC initiative
4. COA reach out to business for new members
5. Listening Groups – input about summer study recommendations.

Revathi K Vikram

APPENDIX F

Comparison of the WHO Age-Friendly DC Domains and MC's Senior Agenda

COA Senior Agenda and WHO Age-Friendly Cities/Community Domain Checklist

This comparison of the COA Senior Agenda and the DC WHO Age-Friendly Cities/Communities Checklist indicate the following key differences:

- The COA Senior Agenda topics are written at a high-level
- Most of the items in the WHO Checklist domains are written at a more detailed level and could be incorporated as a subset of many of the Senior Agenda topics
- There are several WHO Checklist domains that are not addressed in the Senior Agenda:
 - Respect and Social Isolation;
 - Outdoor Spaces and Buildings;
 - Community Support and Health Services (e.g., types of information sources and use of technology);
 - Civic Participation and Employment (Civic Participation);
- DC Age-Friendly Cities has two domains that are not part of the WHO Checklist, (1) Emergency Preparedness and Response, (2) Elder Abuse, Neglect, Fraud
 - The Senior Agenda addresses (2) but not (1) Emergency Preparedness and Response

A careful analysis is needed to determine which WHO Checklist items could be transferred as is, which items may need to have some modified wording, which items may not fit in the Montgomery County environment.

COA SENIOR AGENDA

WHO CHECKLIST

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.

TRANSPORTATION—safe and affordable modes of private and public 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.

<ul style="list-style-type: none"> • 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. 	<ul style="list-style-type: none"> <input type="checkbox"/> Drivers stop at designated stops and beside the curb to facilitate boarding and wait for passengers to be seated before driving off. <input type="checkbox"/> Transport stops and stations are conveniently located, accessible, safe, clean, well-lit and well- marked, with adequate seating and shelter. <input type="checkbox"/> Complete and accessible information is provided to users about routes, schedules and special needs facilities. <input type="checkbox"/> A voluntary transport service is available where public transportation is too limited. <input type="checkbox"/> Taxis are accessible and affordable, and drivers are courteous and helpful. <input type="checkbox"/> Roads are well-maintained, with covered drains and good lighting. <input type="checkbox"/> Traffic flow is well-regulated. <input type="checkbox"/> Roadways are free of obstructions that block drivers' vision. <input type="checkbox"/> Traffic signs and intersections are visible and well-placed. <input type="checkbox"/> Driver education and refresher courses are promoted for all drivers. <input type="checkbox"/> Parking and drop-off areas are safe, sufficient in number and conveniently located. <input type="checkbox"/> Priority parking and drop-off spots for people with special needs are available and respected.
<p><u>HOUSING</u> <i>Vision: Montgomery County will promote choices of dwelling types so that as the needs and preferences of older adults change, they can age</i></p>	<p><u>HOUSING</u> - <i>wide range of housing options for older residents, aging in place and other home modification programs.</i> <input type="checkbox"/> Sufficient, affordable housing is available in areas that are safe and close to services and the rest of the community.</p>

<p><i>in place, downsize, choose rental or ownership, or find housing with the appropriate level of supportive services without having to leave the community.</i></p> <ul style="list-style-type: none"> • 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. 	<ul style="list-style-type: none"> <input type="checkbox"/> Sufficient and affordable home maintenance and support services are available. <input type="checkbox"/> Housing is well-constructed and provides safe and comfortable shelter from the weather. <input type="checkbox"/> Interior spaces and level surfaces allow freedom of movement in all rooms and passageways. <input type="checkbox"/> Home modification options and supplies are available and affordable, and providers understand the needs of older people. <input type="checkbox"/> Public and commercial rental housing is clean, well-maintained and safe. <input type="checkbox"/> Sufficient and affordable housing for frail and disabled older people, with appropriate services, is provided locally.
<p><u>SOCIALIZATION & LEISURE</u></p> <p><i>Vision: Montgomery County will encourage and support vital living of older adults by providing opportunities for physical, mental and social</i></p>	<p><u>SOCIAL PARTICIPATION</u> - <i>access to leisure and cultural activities and opportunities for older residents to participate in social and civic engagement with their peers and younger people.</i></p>

<p><i>interaction.</i></p> <ul style="list-style-type: none"> • 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. 	<ul style="list-style-type: none"> <input type="checkbox"/> Venues for events and activities are conveniently located, accessible, well-lit and easily reached by public transport. <input type="checkbox"/> Events are held at times convenient for older people. <input type="checkbox"/> Activities and events can be attended alone or with a companion. <input type="checkbox"/> Activities and attractions are affordable, with no hidden or additional participation costs. <input type="checkbox"/> Good information about activities and events is provided, including details about accessibility of facilities and transportation options for older people. <input type="checkbox"/> A wide variety of activities is offered to appeal to a diverse population of older people. <input type="checkbox"/> Gatherings including older people are held in various local community spots, such as recreation centres, schools, libraries, community centres and parks. <input type="checkbox"/> There is consistent outreach to include people at risk of social isolation.
	<p><u>RESPECT & SOCIAL INCLUSION</u> - <i>programs to support and promote ethnic and cultural diversity, along with programs to encourage multigenerational interaction and dialogue.</i></p> <ul style="list-style-type: none"> <input type="checkbox"/> Older people are regularly consulted by public, voluntary and commercial services on how to serve them better. <input type="checkbox"/> Services and products to suit varying needs and preferences are provided by public and commercial services. <input type="checkbox"/> Service staff are courteous and helpful. <input type="checkbox"/> Older people are visible in the media, and are depicted positively and without stereotyping. <input type="checkbox"/> Community-wide settings, activities and events attract all generations by accommodating age-specific needs and preferences.

	<ul style="list-style-type: none"> <input type="checkbox"/> Older people are specifically included in community activities for “families”. <input type="checkbox"/> Schools provide opportunities to learn about ageing and older people, and involve older people in school activities. <input type="checkbox"/> Older people are recognized by the community for their past as well as their present contributions. <input type="checkbox"/> Older people who are less well-off have good access to public, voluntary and private services.
	<p><u>OUTDOOR SPACES & BUILDINGS</u> - <i>accessibility to and availability of safe recreational facilities.</i></p> <ul style="list-style-type: none"> <input type="checkbox"/> Public areas are clean and pleasant. <input type="checkbox"/> Green spaces and outdoor seating are sufficient in number, well-maintained and safe. <input type="checkbox"/> Pavements are well-maintained, free of obstructions and reserved for pedestrians. <input type="checkbox"/> Pavements are non-slip, are wide enough for wheelchairs and have dropped curbs to road level. <input type="checkbox"/> Pedestrian crossings are sufficient in number and safe for people with different levels and types of disability, with nonslip markings, visual and audio cues and adequate crossing times. <input type="checkbox"/> Drivers give way to pedestrians at intersections and pedestrian crossings. <input type="checkbox"/> Cycle paths are separate from pavements and other pedestrian walkways. <input type="checkbox"/> Outdoor safety is promoted by good street lighting, police patrols and community education. <input type="checkbox"/> Services are situated together and are accessible. <input type="checkbox"/> Special customer service arrangements are provided, such as separate queues or service counters for older people.

	<ul style="list-style-type: none"> <input type="checkbox"/> Buildings are well-signed outside and inside, with sufficient seating and toilets, accessible elevators, ramps, railings and stairs, and non-slip floors. <input type="checkbox"/> Public toilets outdoors and indoors are sufficient in number, clean, well-maintained and accessible.
<p><u>HEALTH & WELLNESS</u></p> <p><i>Vision: Montgomery County will expand public health and prevention programs that promote physical, mental, social and environmental health for older adults.</i></p> <ul style="list-style-type: none"> • 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. 	<p><u>COMMUNITY SUPPORT & HEALTH SERVICES</u> - <i>access to homecare services, clinics and programs to promote wellness and active aging.</i></p> <ul style="list-style-type: none"> <input type="checkbox"/> An adequate range of health and community support services is offered for promoting, maintaining and restoring health. <input type="checkbox"/> Home care services include health and personal care and housekeeping. <input type="checkbox"/> Health and social services are conveniently located and accessible by all means of transport. <input type="checkbox"/> Residential care facilities and designated older people's housing are located close to services and the rest of the community. <input type="checkbox"/> Health and community service facilities are safely constructed and fully accessible. <input type="checkbox"/> Clear and accessible information is provided about health and social services for older people. <input type="checkbox"/> Delivery of services is coordinated and administratively simple. <input type="checkbox"/> All staff are respectful, helpful and trained to serve older people. <input type="checkbox"/> Economic barriers impeding access to health and community support services are minimized. <input type="checkbox"/> Voluntary services by people of all ages are encouraged

<ul style="list-style-type: none"> • 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. 	<p>and supported.</p> <ul style="list-style-type: none"> <input type="checkbox"/> There are sufficient and accessible burial sites. <input type="checkbox"/> Community emergency planning takes into account the vulnerabilities and capacities of older people.
<p><u>COMMUNICATIONS</u></p> <p><i>Vision: Montgomery County will distribute and publicize re-cognizable, understandable, timely, and accessible information on County and public resources and services for older adults.</i></p> <ul style="list-style-type: none"> • 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. 	<p><u>COMMUNICATION & INFORMATION</u> - <i>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.</i></p> <ul style="list-style-type: none"> <input type="checkbox"/> A basic, effective communication system reaches community residents of all ages. <input type="checkbox"/> Regular and widespread distribution of information is assured and a coordinated, centralized access is provided <input type="checkbox"/> Regular information and broadcasts of interest to older people are offered. <input type="checkbox"/> Oral communication accessible to older people is promoted. <input type="checkbox"/> People at risk of social isolation get one-to-one information from trusted individuals. <input type="checkbox"/> Public and commercial services provide friendly, person-to-person service on request. <input type="checkbox"/> 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. <input type="checkbox"/> Print and spoken communication uses simple, familiar words in short, straightforward sentences. <input type="checkbox"/> Telephone answering services give instructions slowly and clearly and tell callers how to repeat the message at any time. <input type="checkbox"/> Electronic equipment, such as mobile telephones, radios,

	<p>televisions, and bank and ticket machines, has large buttons and big lettering.</p> <p><input type="checkbox"/> 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.</p>
<p><u>EMPLOYMENT</u></p> <p><i>Vision: Montgomery County will recognize the extent and value of the contribution of older adults to the economy.</i></p> <ul style="list-style-type: none"> • 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. 	<p><u>CIVIC PARTICIPATION & EMPLOYMENT</u> - <i>promotion of paid work and volunteer activities for older residents and opportunities to engage in formulation of policies relevant to their lives.</i></p> <p><input type="checkbox"/> A range of flexible options for older volunteers is available, with training, recognition, guidance and compensation for personal costs.</p> <p><input type="checkbox"/> The qualities of older employees are well promoted.</p> <p><input type="checkbox"/> A range of flexible and appropriately paid opportunities for older people to work is promoted.</p> <p><input type="checkbox"/> Discrimination on the basis of age alone is forbidden in the hiring, retention, promotion and training of employees.</p> <p><input type="checkbox"/> Workplaces are adapted to meet the needs of disabled people.</p> <p><input type="checkbox"/> Self-employment options for older people are promoted and supported.</p> <p><input type="checkbox"/> Training in post-retirement options is provided for older workers.</p> <p><input type="checkbox"/> Decision-making bodies in public, private and voluntary sectors encourage and facilitate membership of older people.</p>
	<p><u>DC EMERGENCY PREPAREDNESS & RESPONSE</u> - <i>information, education and training to ensure the safety,</i></p>

	<i>wellness and readiness of seniors in emergency situations. (District-specific)</i>
<p><u>SECURITY & SAFETY</u></p> <p><i>Vision: Montgomery County will provide physical, financial, and technological protection and safety for older adults.</i></p> <ul style="list-style-type: none"> • 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. 	<p><u>DC ELDER ABUSE, NEGLECT, FRAUD</u> - <i>prevention and prosecution of financial exploitation, neglect, and physical, sexual and emotional abuse of seniors. (District-specific)</i></p>