Appendix G: Summary of Breakout Sessions

Executive Summary of Breakout Sessions

Introduction

In early November 2011, the Pennsylvania Department of Aging (PDA) and the Commonwealth’s Office of Long-Term Living (OLTL), along with their partners, the Pennsylvania Association of Area Agencies on Aging (P4A) and the Pennsylvania Council on Aging (PCoA), met in Hershey, Pennsylvania for their Annual Statewide Meeting.

One of the primary objectives of the meeting was to gather feedback from attendees to assist in developing the State Plan for Aging, as mandated by the United States Department of Health and Human Service’s Administration on Aging. Attendees participated in breakout sessions (held on November 2 and 3) covering the five PDA State Plan policy themes:

- Innovation Incubator for Senior Service
- Communities to Age and Live Well
- Revitalize and Rearchitect Aging Services
- Promote Health and Wellbeing
- Effective and Responsive Management

Each of the facilitated sessions included a panel of subject matter experts who provided opening remarks to help frame the discussion. However, the focus of the sessions was on the feedback provided by the planning partners who are most familiar with the needs of the Commonwealth’s aging and disabled citizens.

Recorders were assigned to capture comments from each of these sessions. Those comments serve as the basis for this executive summary, which provides an overview of the issues and challenges raised regarding each of the five themes, as well as potential solutions for addressing them. This report also highlights the numerous crossover concerns—that is, those that arose in more than one of the five themes. Within each theme area, these items are indicated with an asterisk; a brief discussion of the crossover concerns is also included in this report.

The issues from the breakout sessions are presented as numbered items merely for the convenience of the reader; their order is not intended to suggest prioritization of one item over another. Further, it is important to note that the information presented in the report is intended as a preliminary resource for PDA and its partners to use in the numerous activities (including upcoming focus groups sessions) related to the development of the State Plan.
Breakout Session: Innovation Incubator for Senior Service

An Innovative Incubator for Senior Services is an arena—both virtual and physical—designed to find, test, and demonstrate innovative solutions for improving the quality of life for Pennsylvania’s seniors and disabled individuals. It will comprise a network that supports the development and promulgation of these innovations and builds the capacity (including financial mechanisms) for delivering these innovations.

**Issue/Challenge: How do we help to ensure the consistent, streamlined delivery of services and care?**

**Potential Solutions**

1. Ensure that state policies are balanced so that those in need do not fall through the cracks.
2. *Promote the role of AAAs as the face of Aging. Do a better job of connecting people with their AAA through “branding.”*
3. *Make good data accessible to local aging organizations to assist in their planning and programming.*
4. *Prioritize. AAAs cannot and should not be trying to serve everybody. Be creative in programming. Be wary of destroying innovative practices by insisting that a “one size fits all” approach will work.*
5. *Get services to people, rather than people to services. In the alternative, provide senior centers with the means to provide their own transportation (e.g., vans, volunteers, and contracts with independent providers beyond Shared Ride) and the means to share these services between centers. Ensure that transportation is door-to-door, rather than curb-to-curb. Explore solutions to the barrier of liability insurance.*

**Issue/Challenge: What changes can we make to ensure that resources are allocated appropriately and effectively?**

**Potential Solutions**

1. *Permit some flexibility within mandates for more local control of how resources are allocated.*
2. *Reallocate the majority of lottery money to aging initiatives.*

**Issue/Challenge: What steps can we take to promote better program communication?**

**Potential Solutions**

1. *Create an easy way to promote sharing of innovative practices. Look to the Pennsylvania Association of Senior Centers as a model for sharing.*
2. *Do more to communicate to consumers that they must not wait until they are in crisis mode before contacting their local AAAs.*
3. *Provide consistent, current information regarding programs at the state level (e.g., PACE).*

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4. *Continue to educate program providers, such as physicians and their staff.  
5. Include consumers in the conversation; don’t presume to know what people want.

**Issue/Challenge:** How can collaboration with others help us address gaps in service delivery and funding?

**Potential Solutions**

1. *Develop collaboration among private and public partners to address housing issues and keeping seniors in their homes. Encourage heightened awareness in existing neighborhoods to create sustainable environments.*
2. *Reach out to and piggyback with local partners in community events and resource sharing (especially for transportation, meal preparation, nutrition, and education). Overcome the fear of partnership on both sides of the equation.*
3. *Provide help in developing and sustaining local partnerships. Include municipal officials for practical, community-based initiatives on issues such as zoning.*
4. *Explore and work with universities and other institutions that have created benchmarks for innovative solutions (e.g., housing, technology, nutrition, and recreation).*

**Issue/Challenge:** What can we do to develop and promote the vital role of senior centers?

**Potential Solutions**

1. *Permit alternatives to mandated 1/3 USDA requirements in choice of meals and how meals are prepared. Serve seniors meals that they like and can take home if they choose.*
2. *Restructure senior centers to encourage more congregate meals (versus home delivery).*
3. *Advertise services available in senior centers and other innovative programs in place. Target baby boomers. Be creative in programming to attract diverse consumers. Encourage senior centers without walls.*
4. *Recognize and promote the value of adult day services. Educate those who work with older consumers, as well as consumers and their families.*

**Issue/Challenge:** What additional resources can we provide for caregivers and others who work with seniors and disabled individuals?

**Potential Solutions**

1. *Encourage employee assistance programs to provide resources for adult children with aging parents (the sandwich generation), as well as resources for the children themselves to plan for their older years.*
2. *Encourage and expand volunteer opportunities.*
Breakout Session: Communities to Age and Live Well

The theme of Communities to Age and Live Well has at its core aging in place (AIP)—that is, the ability to live in one’s home as long as safely, comfortably, and medically possible. While there are a number of AIP models, such as Naturally Occurring Retirement Communities (NORCs) and Village Networks, the key is providing individuals with options for making the right choice for their circumstances.

Issue/Challenge: What consideration or accommodations must we make in funding and assistance for adults to age in place?

Potential Solutions
1. *Consider the supports necessary to keep individuals out of nursing homes. Eliminate financial barriers to access to personal care homes.
2. *Provide supports for the working children who care for these individuals (including flexibility with employers and the need for competent, reliable, and trustworthy help).
3. *Provide real incentives for those who want to work with older individuals, including older folks who may be caregivers and need the income.
4. *Create more assistance opportunities and resources for those in the middle-income range.
5. Continue to push property tax relief for older individuals.

Issue/Challenge: What can we do to allow individuals to stay in their homes?

Potential Solutions
1. *Take into account the good amount of housing stock in the state. Expand upon programs for retrofitting and refurbishing these homes, where feasible. Explore how Habitat for Humanity could serve as a model.
2. *Address how to keep people in their homes, regardless of whether they live in the city, suburbs, or in rural areas. Work with other programs to address deteriorating conditions, economies, and infrastructure in communities where older people live.
3. Explore tenant/homeowner models for shared expense in areas where housing is expensive or where foreclosure rates are high.

Issue/Challenge: How do we ensure that transportation and other systems guarantee accessibility to services?

Potential Solutions
1. *Develop additional and more readily accessible transportation options, particularly for those living in rural areas.
2. *Encourage regional cooperation. Eliminate fragmented systems and provincialism.
3. Narrow the discrepancy in transportation services between those on Medical Assistance and the elderly in general.
4. *Be certain that PDA is closer to this issue to enact change at the state level and to leverage their resources for greater community cooperation.
5. Consider walkability studies to ensure that older individuals can safely cross the streets in their communities.
6. Do more to encourage younger doctors to stay in Pennsylvania (to alleviate gaps in care as older providers retire).

**Issue/Challenge: How can we protect those at greatest risk?**

**Potential Solutions**

1. *Set up additional safeguards and education for those older consumers at greater risk: the single person, widow, or widower; those living alone; those with no family; older women who are financially inexperienced, suffer cognitive disorders, or experience confusion due to unmonitored prescription medications; those who are uneducated; those who are non-English speaking; and the senior homeless.*
2. Develop public/private partnerships to address not only the needs of older people but to protect them from physical, emotional, and financial abuse.

**Issue/Challenge: How do we encourage greater individual responsibility?**

**Potential Solutions**

1. *Develop more long-term care insurance options (both in the public and private sectors).*
2. *Educate all adults on the need for saving and planning for their older years, rather than relying on Medicare as their insurance policy.*

**Issue/Challenge: What steps can we take to improve program communication and delivery?**

**Potential Solutions**

1. *Develop a media campaign that encourages individuals to reach out to the AAA before they hit crisis mode.*
2. *Use existing public (e.g., lottery ads) and private (e.g., tax bills) mechanisms.*
3. *Use OLTL’s rebranding initiative to support a consistent message.*
4. *Enlist “gatekeepers” (such as pastors, doctors, visiting nurses, neighborhood groups, and senior centers) to reach out with more informal supports and earlier intervention.*
5. *Streamline processes to ensure quicker access to services and programs.*
6. Appoint an advocate for the aging within each state agency.
7. *Provide flexibility in programming and budgeting for senior centers. Develop true community centers, where people of all ages gather.*
Breakout Session: Revitalize and Rearchitect Aging Services

Revitalize and Rearchitect Aging Services focuses on examining the spectrum of existing services, and exploring new means for better programming and service delivery, particularly in terms of outcomes and client satisfaction. Initiatives within this theme area must consider the diverse needs Pennsylvania’s seniors and disabled individuals, now and in the future.

Issue/Challenge: What steps can we take to improve program communication and delivery?

Potential Solutions

1. *Ensure that information is disseminated through a variety of means. Develop best practices for communicating with those without Internet access, those who have visual, hearing, or other impairments, and those who are non-English speaking.
2. Encourage the PDA to take the lead in addressing and simply defining “consumer choice.”
3. Promote better understanding of acute care versus in-home services. *As part of the process, make the Social Assistance and Management System (SAMS) more user-friendly and efficient.
4. Reconsider the use of jargon; provide simpler definitions for consumers.
5. Create a common application for all programs.
7. Consolidate meal programs to eliminate competition between free meal programs and those that are private-pay.
8. Recruit more volunteers for the Ombudsman and APPRISE programs, especially among recently retired insurance and healthcare professionals. Do more to promote these programs.
10. *Brand AAAs to promote their services and role.
11. *Collaborate with other agencies in cross-programming related to aging issues (such as healthy living and mental health).

Issue/Challenge: What can we do to allow individuals to stay in their homes and with their families?

Potential Solutions

1. Focus on quality housing for low-income individuals.
2. *Promote shared housing and look at associated zoning issues that might create barriers.
3. Implement greater tax breaks and low-interest loan options for home renovation/retrofit.
4. *Break down barriers to multi-generational housing.
5. Provide guidance on how to develop Naturally Occurring Retirement Communities (NORCs).
Issue/Challenge: How can we protect those at greatest risk?

Potential Solutions

1. *Provide more funding for protective services and other means to engender a safe, in-home environment.
2. Strengthen faltering guardianship programs.
3. *Provide AAAs with more assistance in dealing with financial exploitation.

Issue/Challenge: How do we address access to transportation?

Potential Solutions

1. *Develop regional systems (rather than county-by-county). Look at existing models such as Rabbit Transit of York and Adams County.
2. Search for ways to decrease wait time and shorten trips by linking essential services to routes.
3. *Determine who will take ownership at the state level for resolving transportation issues.

Issue/Challenge: What additional resources can we provide for caregivers and others who work with seniors and disabled individuals?

Potential Solutions

1. *Get the word out on programs available to caregivers.
2. Provide greater incentives to working spouses to stay home and provide care.
3. *Promote adult day services.
4. *Develop peer volunteer supportive assistance programs.

Issue/Challenge: How do we ensure greater access to services?

Potential Solutions

1. *Enable greater access to services for those in the middle-income range. Perhaps create fee-for-service programs.
2. Allow access to all Medical Assistance programs, not just LIFE, to move consumers off of waiting lists and into programs.
3. Eliminate restrictions on assistance for those aged 60 to 64 years.
4. *Allow AAAs more flexibility with state funding. Promote shared services with other counties/states. Engender local creativity as opposed to searching for eligibility within state regulations.
5. *Restructure senior center programming. Include childcare centers to allow grandparent caretakers the opportunity to participate in programs. Foster intergenerational programs that teach computer skills. Advertise creative programming. Consider senior centers without walls.

**Issue/Challenge: How do we encourage greater individual responsibility?**

**Potential Solutions**

1. *Prepare for the aging of baby boomers. Partner with businesses, industries, and insurance companies on pre-retirement counseling. Consider issues related to the potential poverty of these individuals due to job and benefit losses.*

**Breakout Session: Promote Health and Wellbeing**

This theme area considers what comprises a healthy lifestyle and wellbeing, including factors such as nutrition, disease management, fitness, and benefits, and how to refine, develop, and promote initiatives for health and wellbeing for seniors and individuals with disabilities of all ages.

**Issue/Challenge: How do we enhance program communication and collaboration?**

**Potential Solutions**

1. *Enhance programs that provide seniors with a sense of purpose, such as volunteer peer-assistance and mentoring.*
2. *Do more to eliminate the perceived stigma associated with subsidized health and wellbeing programs such as the Supplemental Nutrition Assistance Program (SNAP). Help seniors overcome their intimidation of the paperwork involved with these programs.*
3. *Consider more private/public partnerships for senior center fundraising and other aging initiatives/needs (e.g., grant writing). Recruit partners from insurance companies, gyms, and healthcare organizations.*
4. *Strengthen existing partnerships that may be in jeopardy due to funding.*
5. *Provide the means, including the Internet and Facebook, to showcase successful programs.*
Issue/Challenge: What can we do to develop and promote the vital role of senior centers?

Potential Solutions

1. *Promote senior centers as sites for overall health and wellbeing programs (e.g., ability-appropriate exercise classes, emotional support, socialization). Get that word out about diverse programming for individuals of all income levels. Revamp their image. Collaborate with private partners to bring programs into the centers (e.g., Curves, Silver Sneakers).*
2. *Implement the proposed Aging Program Directive (APD) to allow senior centers more flexibility in meal offerings. Examine regulations related to charging those who can afford it to pay for meals provided by senior centers.*
3. *Take senior center programs into the community. Share community resources, such as libraries, community centers, churches, and pools. Reach out with meals as well as activities to those who cannot get to senior centers (senior center without walls).*

Issue/Challenge: What educational opportunities can we create or expand on to promote programs?

Potential Solutions

1. Provide both on-site and virtual demonstrations on nutrition and healthy meal preparation.
2. Promote healthy eating demonstrations as opportunities for both education and socialization.
3. *Educate those who provide healthcare and in-home care about aging programs and services. In turn, they can educate those they care for.*
4. Do more to address legal drug abuse and overmedication, emotional wellbeing, chronic disease management, and protective services. Partner with insurance and pharmaceutical companies in this effort.
5. Promote more personal responsibility regarding health and wellbeing.
6. Create a speakers’ bureau to work with employers and other organizations on counseling people on what to expect in retirement, including health and wellbeing concerns.

Issue/Challenge: What can we do to allow individuals to stay in their homes and with their families?

Potential Solution

1. *Advocate for multi-generational housing. Eliminate financial barriers, such as ineligibility for supports, when older people have younger family members living with them.*
Breakout Session: Effective and Responsive Management

Effective and Responsive Management ensures that available resources are used effectively in providing services and support for seniors and disabled individuals, in both the short and long term. As part of this commitment to good stewardship, this theme area must also take into account how regulations and policies impact the funding and delivery of services.

Issue/Challenge: How do we help to ensure the consistent, streamlined delivery of services and care?

Potential Solutions

1. *Enhance continuum of care. Work to streamline the individual service plan (ISP) and other processes to eliminate the service delivery gap.
2. *Increase capacity for delivering services, in terms of both funding and personnel. Give aging services the same attention that waivers do.
3. Look at how current waiver guidelines promote nursing home care versus the services provided in a personal care home.
4. Investigate regulations such as the Portable Care Act and other CMS initiatives might provide more opportunities for consumers.
5. Fully implement Community Choice throughout the state, but first iron out issues that may impede its successful implementation.
6. Create a program within the PDA to mentor and train the next generation of those interested in providing aging services.
7. Address the shortage of healthcare workers and professional caseworkers.

Issue/Challenge: How do we enhance communication and collaboration?

Potential Solutions

1. *Develop and enhance community partnerships to close gaps in funding.
2. *Enhance regional collaboration and cooperation.
3. *Develop collaboration between departments within the state government to advance knowledge of and information about available programs.
4. *Share best practices, such as senior centers without walls.
5. *Nurture the relationship between AAAs and PDASA/OLTL. Guide local AAAs on regulations and policy. Ensure that communication and dissemination of information is consistent. Work more closely to eliminate regulations that might hamper the flexibility of local providers in the creative delivery of their services. Keep AAAs informed of outcomes and findings on reported abuse cases. Include AAA fiscal officers in discussion regarding fiscal policy. Visit AAAs.
6. Complete and distribute the Home and Community Based Services (HCBS) manual.
7. *Upgrade SAMS, as the program is not user-friendly, integrated, or efficient. Use data to establish benchmarks and develop outcome measures.
Issue/Challenge: What can we do to empower agencies on the local level?

Potential Solutions

1. Assist AAAs in expanding the Domiciliary (DOM) Care Program.
2. *Promote local autonomy and de-emphasize standardization.
3. Ensure that staffing ratios for programs such as adult day services are in line with the size of the community.
4. *Revise APD for senior centers. Also consider how technology impacts on programs that senior centers are encouraged to run.
5. *Be respectful of cultural diversity within Pennsylvania and take this diversity into consideration when delivering services.

Issue/Challenge: How do we address access to transportation?

Potential Solution

1. *Address concerns related to Shared Ride (e.g., inability to cross county and state lines, compatibility with the needs of riders).

Issue/Challenge: How can we protect those at greatest risk?

Potential Solutions

1. *Enforce standards for in-home service providers. Re-knit the security blanket that ensured no harm or neglect.
2. Examine standardized rate settings to help retain transportation and other providers that assist AAAs. Increase reimbursement rates to providers.

Crossover Concerns

Issue/Challenge: How do we ensure clear communication about programs and services?

Communication, whether it be between state agencies, between local AAAs and the PDA, or between consumers and various aging agencies, must be enhanced. Perhaps the most vocal concerns were related to communicating with consumers on what programs are available and how to reach consumers before they hit “crisis mode.” Participants suggested developing media campaigns using existing public (e.g., lottery ads) and private (e.g., tax bills) mechanisms. They also suggested using OLTL’s branding initiative to support a consistent message regarding the pivotal role of AAAs for accessing services. “Gatekeepers” (such as pastors, doctors, visiting nurses, neighborhood groups, and senior centers) should be enlisted to reach out with more informal supports and earlier intervention.
Participants noted that information should be disseminated through a variety of means, including the Internet and Facebook. This also means developing best practices for communicating with those without Internet access, those who have visual, hearing, or other impairments, and those who are non-English speaking. Participants also asked for better communication regarding innovative practices, including the creation of an easy way share these practices. They suggested that an upgraded SAMS might also serve as a vehicle for sharing best practices.

**Issue/Challenge: How can we enhance and streamline coordination of care?**

Participants stressed the importance of appropriate, consistent, and coordinated health care delivery services for the culturally diverse elderly population across Pennsylvania. More must be done to enhance continuum of care. Participant suggested streamlining the ISP and other processes to eliminate the service delivery gap and to increase capacity for delivering services, in terms of both funding and personnel. Further, senior services programming must create more assistance opportunities and resources for those in the middle-income range who might not otherwise be eligible for services.

Conversely, participants said that innovative programs would be destroyed by insisting that a “one size fits all” approach. The key, according to these participants, is flexibility within mandates for more local control of how resources are allocated.

**Issue/Challenge: How do we keep seniors in their homes?**

A number of common concerns were raised regarding housing. The central theme was allowing adults to age in place. Participants said that all of those in the aging community should consider the supports necessary to keep individuals out of nursing homes (where appropriate), including rebalanced funding and eliminating financial barriers to access to personal care homes.

Participants suggested collaboration among private and public partners, including universities and other institutions that have created benchmarks for innovative solutions. They encouraged heightened awareness in existing neighborhoods to create sustainable environments. This includes taking into account the housing stock within Pennsylvania and programs for refurbishing and refitting these homes, where feasible. Participants noted that Habitat for Humanity could serve as a model for a more community-based effort. Facilitating aging in place also requires a look at improving the economy and infrastructure for a given area, whether it be urban, suburban, or rural, as well as ensuring that quality housing exists for low-income seniors.

Participants offered a number of other suggestions for helping seniors stay in their homes. These included exploring tenant/homeowner models for shared expense; promoting shared and multi-generational housing, and looking at associated zoning or other issues that might create barriers. Participants also suggested more funding for protective services to engender a safe, in-home environment and to provide AAAs with more assistance in dealing with exploitation.
**Issue/Challenge: How do we enhance transportation systems to ensure access to services?**

Participants pointed out the close relationship between housing and transportation in linking older adults to essential services. They talked of the need to develop additional and more readily accessible transportation options, particularly for those in rural areas.

They asked to state to help in encouraging regional cooperation and eliminating fragmentation and provincialism. In addition, participants asked the state to explore why liability insurance is such a barrier to implementing private transportation programs. Participants challenged PDA to get closer to and take ownership of the issues surrounding transportation, to enact change at the state level and to leverage their resources for greater community cooperation.

**Issue/Challenge: What can we do to develop and promote the vital role of senior centers?**

Participants also said that senior centers should advertise their role in the overall health and wellbeing for individuals of all income levels. Centers should be given more flexibility and creativity in programming and budgeting. Participants noted the success of “centers without walls,” and encouraged more private/public partnerships for funding programs like these that bring services to the consumer. To do so, they suggested greater sharing of community resources, such as libraries, community centers, churches, and pools.

Participants also urged the implementation the proposed APD to allow senior centers more flexibility in meal offerings. They also suggested examining regulations related to charging those who can afford it to pay for meals provided by senior centers. In addition, more should be done to promote adult day services and to enhance programs that provide seniors with a sense of purpose, such as volunteer peer-assistance and mentoring.

**Issue/Challenge: What means can we develop to provide more support for caregivers?**

Participants stated that additional supports should be provided for the working children who care for their parents. Suggestions included encouraging employers to be more flexible in granting time off when needed, resources to find competent, reliable, and trustworthy help, and education on what programs are available. In addition, participants also suggested providing financial incentives and education for those who want to work with older individuals.

**Issue/Challenge: How do we promote individual responsibility?**

Last but not least, participants spoke of the need to educate all adults on the need for saving and planning for their older years, rather than relying on Medicare as their insurance policy. Participants said that employee assistance programs might include resources for adult children with aging parents, as well as resources for the children themselves to plan for their older years. In addition, more should be done to promote self-management and to develop more long-term care insurance options (both in the public and private sectors).