AARP®

Summary Report

from the

National Strategy Forum:
Livable Communities for All Ages
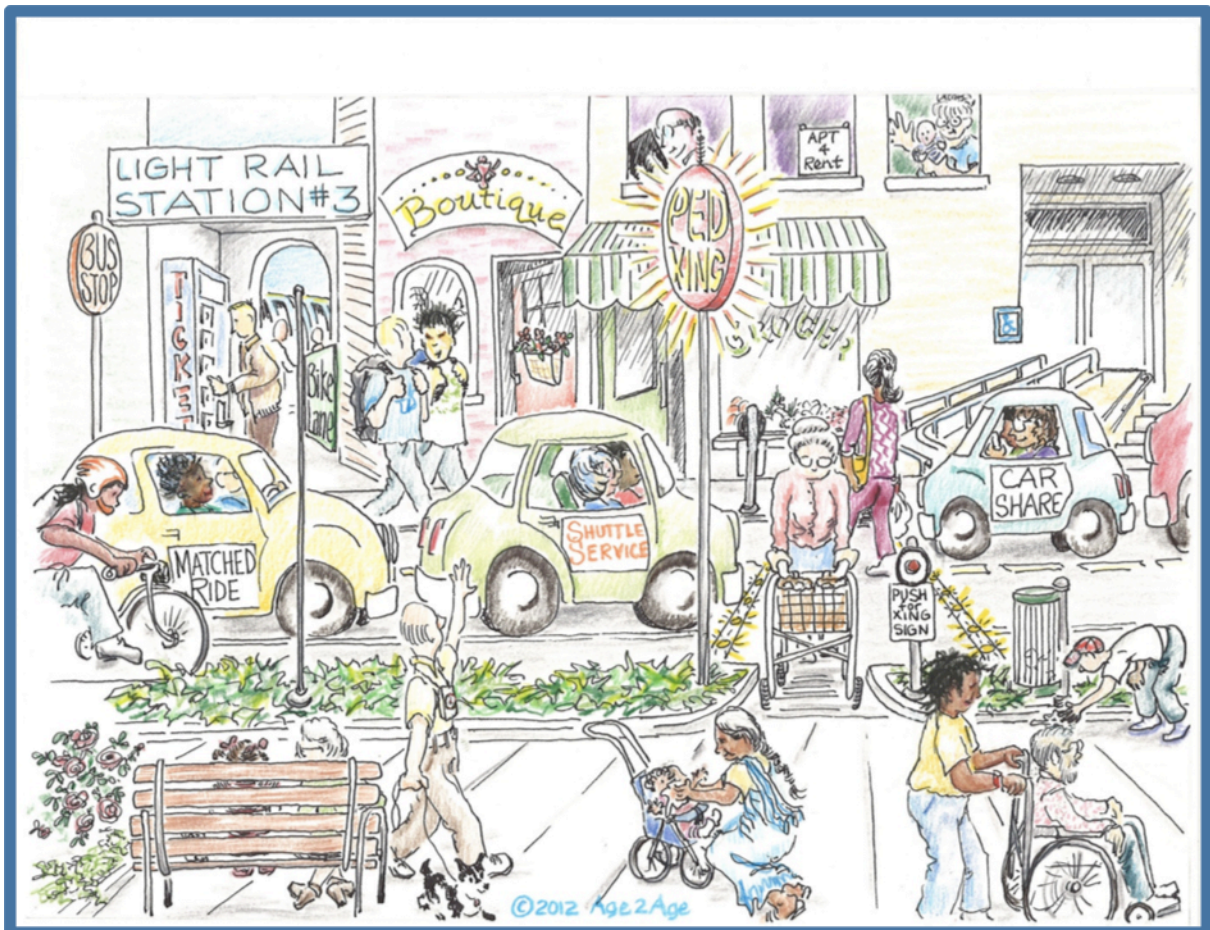
September 18, 2012

Washington, DC

Prepared by

Chris Kennedy

Age2Age Consulting

www.Age2Age.com

Artwork Courtesy of Age2Age Consulting

Communities across the country are in varying degrees of preparedness when it comes to meeting the needs of an aging population. Some are oblivious to the growing need for change, while others are far along in making adjustments to policies and the built environment that enhance livability. There is a need to elevate this topic in America, and explore new solutions to manage the myriad of challenges, and the opportunities, that will accompany a burgeoning elder population.

AARP

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Recognizing this need, AARP hosted a *National Strategy Forum on Livable Communities for All Ages* on September 18, 2012. It is one of a series of invitational meetings that AARP will convene throughout the fall of 2012 with private sector leaders, government agencies, non-profits and thought leaders. The proceeds from these meetings are intended to support the development of strategies and next steps.

THE BACKGROUND, THE GOALS & THE GATHERING

Key thought leaders from the national government, non-profit organizations and funding organizations were invited to participate in a cross-sector meeting at the AARP headquarters in Washington DC. Twenty-five representatives participated in the *National Strategy Forum: Livable Communities for All Ages*. A complete list of participating organizations is included in Appendix 1.

> AARP's definition of a Livable Community is one that has affordable and appropriate housing, supportive community features and services, and adequate mobility options, which together facilitate personal independence and the engagement of residents in civic and social life.

AARP convened the *National Strategy Forum* in order to learn how national organizations are engaging in community-level work to prepare for an aging population, and identify ways in which national organizations can collaborate to help improve communities nationwide. AARP partnered with *Age2Age Consulting* to design the *National Strategy Forum*, develop a survey of participants, compile survey results, facilitate the meeting, and create this report.

In the weeks prior to the *National Strategy Forum,* a survey was sent to all participants to gather information regarding each organization's perspective about livable communities for all ages, and their current livable community initiatives. (See Fig.1)
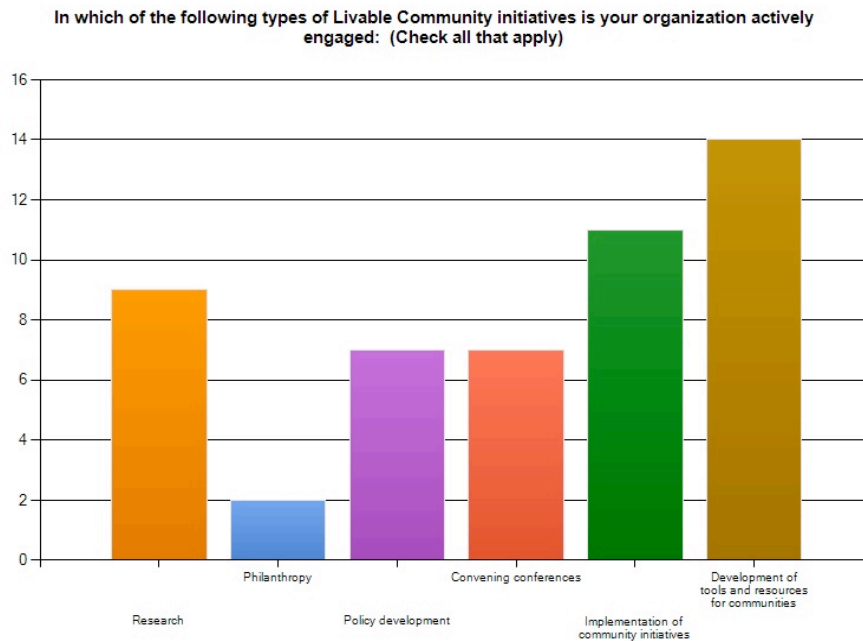
In which of the following types of Livable Community initiatives is your organization actively engaged: (Check all that apply)

Figure 1: National Strategy Forum Participants:
Engagement in Livable Community Activities

Participant Profiles were developed from the survey responses and distributed in advance to attendees. The survey also asked participants for topics of interest regarding collaboration and livable communities. The agenda for the *National Strategy Forum* was developed to incorporate these areas of mutual interest.

The format of the day was designed to generate conversations among the participants, to present information about current topics of interest, and to exchange information about the projects, programs, resources, ideas and suggestions that each of these subject matter experts could contribute.

After participants shared their visions of the future of aging and community, presentations were given that focused on the need for local collaboration and for national advocacy. There was rich discussion of the challenges and opportunities recognized by each of the participating organizations. During three brainstorming sessions, the participants contributed their ideas and expertise about 1.) model programs on local and national levels, 2.) resources and publications, and 3.) organizations and associations that could be included in future convenings.

> *"A major priority of AARP is helping people stay in their homes and communities as they age. As the U.S. population ages, community leaders will need strategies that they can use to adapt their communities to accommodate the aging of their residents, and these changes will benefit all age groups."*
>
> Nancy LeaMond,
> Executive Vice President,
> AARP, State & National Group

AARP's new livable community website aarp.org/livable was debuted at the *National Strategy Forum*. This website is a go-to resource for local officials with the latest information, best practices, research, policy analysis, and funding sources that support livable communities. It is the first time that resources from a wide-range of sources has been compiled in one place and organized with the needs of a local official in mind. There are wrap-ups for each resource that summarize the key points and suggest ways in which local officials might use the information. The site was developed in partnership with the Boomer Project, which has compiled much of the content. Participants applauded the effort and gave suggestions for further development.

The lists of programs and resources generated during the *National Strategy Forum* have been incorporated into the web portal, making these resources available to all. The website provides a new way to disseminate information and creates an opportunity for organizations to share content on best practices, model programs, and innovations.

The full agenda for the day is included as Appendix 2. A summary of the presentations, emerging themes for collaboration, key findings, and next steps are included below.

LOCAL PROGRAMS & PARTNERSHIPS: Leveraging Social Capital

> *"Citizen engagement is important. Focusing on the residents, individual civic leaders and champions who are in the local community for the long haul, can be more effective over time than responding to politicians who come and go. We have elections every two years, but citizens are there forever. We have to get them involved."*
>
> Mae Carpenter,
> Commissioner, Westchester County, Senior Programs & Services

A case study of the collaborative program *Livable Communities: A Vision for All Ages, Bringing People and Places Together* was presented by Mae Carpenter, Commissioner of the Westchester County Department of Senior Programs & Services.

The initiative began in 2006, as a part of AARP's Livable Communities program. Located in Westchester County, New York, just north of Manhattan, the program's goal is to keep seniors in their homes as they grow older with independence, dignity and civic engagement, and develop communities that are friendly to seniors as well as to people of all ages.

The groundwork for the program began by developing many collaborative partnerships with organizations such as N4A, Partners for Livable Communities, AARP, and the Westchester County Private Public Partnership. Community visioning sessions provided information and education, and inspired action. Research conducted included asset mapping, telephone surveys, needs assessments, and innovative funding models; then a Strategic Plan was developed.

In Westchester County, a livable community was defined as a set of informal services provided by volunteers to help seniors remain in their homes and continue to be productive and happy citizens. It is a "neighbors-helping-neighbors" program that teaches people of all generations how to empower themselves to become advocates for change.

Livable Community Villages were established as networks of people joined by shared interests, such as houses of worship, arts organizations, neighborhood watches, senior housing, and civic and social organizations. There are 163 village designations with about 58,000 village members encouraging a "neighbor helping neighbor" way of life.

In 2012, the Livable Community Collaborative (LCC) was launched to increase resource sharing between organizations. Aging services providers – both public and private organizations – were invited to join one of 19 Common Interest Groups (CIGs). A few of these CIGs are Caregiving, Intergenerational Programs, Health and Wellness, Housing and Transportation and Mobility, and Veterans. Each CIG develops livable communities programs centered on their area of interest. Examples of programs that CIGs have created include Grassroots Sources of Information, Caregivers Coaching Program, Creating Virtual Impact and Designing a Legacy.

Ongoing financial support for the LLC is a collaborative effort. Each CIG is responsible to raise funds to support its programs, and also makes contributions to the LLC. In addition, one major annual fundraising event is sponsored and coordinated by the LLC. All of the CIGs participate in creating the event; each CIG is able to keep 50% of the revenue they raised for the event.

Westchester County Livable Communities began with visioning, assessments and convening conversations with multiple partners and experts. Along with the Fordham University Graduate Center for Social Research, ongoing evidence-based research is conducted and procedural handbooks for the successful programs are developed. The outcomes of this collaborative approach have been replicable, evidence-based results that contribute to a livable community for all ages.

NATIONAL POLICY & POSITIONING: Advocacy for Livable Communities

> *"It is apparent that aging in place is not well understood. A clear vision must be developed and presented. Messages to and from experts, and directed at the larger public are needed. There must be a plan with priorities for communication from an advocacy coalition that is broadly inclusive.*
>
> *"In spite of the hurdles, old people will age in place. They are not moving. It is what they want. The question is not, 'Does it happen?' But, rather, 'Are we going to make it easier or harder?'"*
>
> Jane Hickie, Sr. Research Scholar and Director,
> Communities Project,
> Stanford Center on Longevity.

The importance of developing coalitions to advocate for national policies to support aging in place was presented by Jane Hickie of the Stanford Center on Longevity. Coalition work needs to include those who are already leading efforts to support aging in place, as well as opinion leaders in the private and public sectors, elected officials and their staff. Hickie considers AARP as key in this effort because its name is associated with helping older adults and because of its role to lead and guide advocacy.

Hickie is co-author, along with Henry Cisneros, former Secretary of Housing and Urban Development, of the recently published book *Independent for Life: Homes and Neighborhoods for an Aging America* (2012.) In considering an Advocacy Campaign for Aging in Place, the book suggests *"…the following framework with five key elements:*

1. *Recognition of precipitating events and powerful forces that drive change*
2. *A vision that describes the result that is sought, with effective messages to mobilize important segments of the public*
3. *A plan that sets out priorities for action-based expert analysis and consensus for action*
4. *An advocacy coalition of public and private interests for disciplined and sustained incremental reform and comprehensive change*
5. *Executive leadership from the president."*

Stanford Center on Longevity's upcoming work includes white papers on the built environment and housing (supported by the MacArthur Foundation), and work on indicator systems that could be useful for local government (supported by MetLife and University of Michigan.)

EMERGING THEMES FOR COLLABORATION

During the day's discussions, five themes emerged as areas where national collaborative efforts could support local and regional governments to better incorporate the needs of aging populations in sustainable community planning. These five themes are: Awareness, Messaging, Advocacy, "How To" Support, and Funding.

1. Awareness

There is an urgent need to zero in on local leaders, build awareness, articulate how livable communities can contribute to the bottom line, and define a strategy to help leaders move along the continuum from awareness to planning.

In her opening remarks Nancy LeaMond, Executive Vice President for AARP's State and National Group, pointed out that a report several years ago by the International City/County Management Association documented that less than half of our country's jurisdictions were prepared for the future aging of their residents.

How do we move the topic of livable communities up on the agenda for local officials? How can we spotlight the need for change, and highlight those that are taking action?

> "*More and more organizations and companies are now becoming "age aware" and are now making plans to become "age ready"- to prepare for the age shift in a manner that will make them "ageless." Unfortunately, many of these private sector initiatives are just that - private or proprietary. To maximize the huge opportunity for "Livable Communities for All Ages" and other community-based initiatives, we have to do a better job of getting the word out - showcasing the communities that have already realized benefits from embracing an ageless perspective."*
>
> John W. Martin, CEO, Boomer Project

Participant comments and suggestions included:

- The economic opportunities that come with supporting livable communities can be demonstrated by documenting case studies, success stories, and research findings

- The question of how can we get something across to local officials who are only in office for four years was raised. This underscored the importance of engaging citizens in the awareness work. Elected officials can change every two to four years, but the citizens are there for the long haul.

- There needs to be a concerted effort to reach out to elected officials and municipal staff through the associations and media that they turn to for information.

2. Messaging

There is an overarching need to elevate the message that our aging demographic is a topic of high importance – the needs and the opportunities. The messaging discussion centered on the questions of how to get the message across, and what language to use.

While it was agreed that the lack of a shared language can be a challenge, there was not a consensus about a solution. The range of comments included:

- There is not a common set of terms, or shared language about the aging and livability issues. This leads to confusion about the issue and a difficulty for local leaders to understand, embrace and articulate the topic.

- Some participants felt that there is a need to clarify terms and jargon. It was pointed out that many terms, and clusters of terms are used by different organizations to refer to the same topics; so there is a desperate need to say how similar and/or different these terms are to one another.

- The point was also made that "aging doesn't sell" to funders when it comes to grantmaking and that it is better to lead with terms such as *"livable communities", "community improvement", "all ages."*

- It was suggested that there is a need to specifically define terms like "all ages" and clarify the parameters around "livable communities" regarding what is and is not

> *"We see Communities for All Ages as places that are good for growing up and growing older. Therefore we promote policies and practices that draw upon the assets of all age groups, foster a sense of generational interdependence, and encourage alliances rather than competition for resources that benefit people across the life span."*
>
> Nancy Henkin, Ph.D., Executive Director, The Intergenerational Center at Temple University

included. One perspective stated that "livable communities for all ages" ought to be as expansive as having aging organizations engage in public education.

- While much was said in favor of creating a common language, the point was also made that communities interpret certain words and terms in very different ways. For example "complete streets" and "sustainability" are embraced in some parts of the country and abhorred in others. In this regard, it can be important to let communities label and use terms that resonate more with local residents and stakeholders.

Some questions regarding messaging-related topics that were raised include:

> *"We believe that you cannot truly ensure the quality of life of people across their lifespan unless they have the opportunity to live in a community that offers appropriate, adequate, affordable health and wellness, housing, transportation, workforce development, land use and environmental quality, recreation, cultural, civic engagement and lifelong learning opportunities."*
>
> Sandy Markwood, CEO, National Association of Area Agencies on Aging

- Could there be research conducted regarding the best ways to reach local leaders -- methods and language, and the possibility of creating some common terms?
- Could a collaborative media campaign be developed?
- How is the private sector looking at this demographic, and how could collaborative messaging serve both public initiatives and the private sector's bottom line?

There was good discussion but no clear strategy regarding the best way to message the issue. Overall, most participants believe this is an issue about general community improvement and livable communities for all ages. However, there was not consensus on whether there should be specifically defined terms and scope, or whether it is best to let local communities label and name the work in ways that resonate with their community culture.

3. Advocacy

It is important to gain a better understanding of how local governments operate and what factors drive decision-making. Because local governments are being squeezed financially, the challenge is how to introduce new strategies, new issues, and leverage opportunities to make change at the local level.

Jane Hickie's presentation offered one framework for developing an advocacy campaign. And Mae Carpenter's presentation spotlighted successful strategies to engage volunteers in meaningful activity to help influence change in their communities.

Some specific ideas raised by participants related to budgets, leadership, and politics, as well as areas that need more attention or research. Some of these include:

- The need to identify important players on this issue, and develop a strategy for engagement.

- The need to bring the public and private sectors together to develop strategies of mutual benefit.

- The ability to package effective strategies for engaging stakeholders and volunteers at the local level.

- The possibility of being able to score communities for livability standards to help generate pressure to take action, and to arm citizen activists with data to make their case.

4. "How To" Support

Current constraints on local government are huge. While many are just beginning to feel the housing downturn and the need for integrated planning, they also need to learn how to use all their lenses: strategic, capital, operational. For communities wanting to engage in livable community initiatives, each has to figure out: Where to begin? What to do? How to fund it?

"We have had success by starting a list of easy things to do in a community, and then bringing awareness to the changes that evolve. For example when the Sole Steppers walking club for seniors was started by AARP in New Orleans, the crime dropped due to juveniles who would see the walkers. Now, the Sole Steppers group is asking what are destinations we could walk to instead of just walking? They have also begun participating in city council hearings for advocacy and planning. This is an interesting way to build a constituency to help people of all levels."

Neha Bhatt, Deputy Policy Director, Smart Growth America

There were many examples of strategies such as smart growth, intergenerational and collaborative programs, and planning/zoning that contribute to livable communities, and can be showcased.

By providing support to customize and implement local programs of awareness, advocacy and action, the learning curve for communities can be accelerated. But it can all be too overwhelming. It was suggested that a helpful approach could be, "*Start small. Here's a place to stick your toe in the water.*"

The following is a summary of the "how to" topics that the participants of the *National Strategy Forum* are interested in learning more about, and/or suggest are needed to support local governments to address the aging demographic. This is a compilation of comments made during the meeting, and received from the participants in the pre-meeting survey.

How to:

1. Share information on promising programs and how communities, regions, and states are getting "age ready." Communities across the country are making progress to preparing for our changing demographic. How can we evaluate what is working and what are the best ways to share this information?

2. Provide tools to help communities get started. This could include guidance on how to get started as well as toolkits with recommended strategies to assess community features, engage residents and stakeholders, and adopt proven solutions.
3. Explore the best opportunities to incorporate aging into existing community planning and improvement initiatives.
4. Provide models for actively engaging diverse community stakeholders and residents of all ages, race, and income.
5. Message these issues and coordinate work at the national level.

5. Funding

A significant barrier to providing the resources to meet the age wave is funding. While the Federal government has been a major funder of community initiatives, local government has first line responsibility for local initiatives. With diminishing public resources, it is important to develop alternative strategies for sustained support of community initiatives. Strategies for the federal, local, and private sectors were discussed during the *National Strategy Forum*:

A. Federal Agencies and Non-Profit Organizations

   Collaborative programs must be developed to meet mutual goals. Examples cited include:
   1. The HUD-DOT-EPA Partnership for Sustainable Communities.
   2. Demonstration grants that provide a foundation for good planning. Small grants can be big incentives that bring people from all walks together.

B. Local Governments

   Local governments must increase their organizational capacity to reposition themselves for the challenge of responding to the growing number and diversity of to the growing number and diversity of older residents. Strategies suggested include:

   1. Changing local government's service paradigm and developing low or no cost initiatives, such as:

      a. Shifting local government's role from provider to convener or facilitator.
      b. Partnering with more and varied groups.
      c. Implementing an integrated planning model.

> *"An age friendly community cannot be accomplished by one group, department or agency but rather by bringing together a diverse group of skills and perspectives.*
>
> *Without new resources, and facing the challenge of providing existing and expected services and programs, new ways must be developed to meet the life-span needs of local communities."*
>
> Susan G. Robinson,
> Senior Consultant,
> International City/County
> Management Association

2. Accelerating the private sector's ability to meet future needs for housing, programs and services, by:
   a. Changing policies and business practices that are barriers to action (i.e. zoning & red tape) and
   b. Enhancing economic incentives

C. Private Sector

The private sector is a key player and needs to play a role as funders and leaders, nationally and in their own communities. Areas to explore include:
   1. Elevating the issue of aging through a national media campaign, in collaboration with major corporations.
   2. Examining how local and regional businesses can be leaders and catalysts for this message through their business practices, as well as bringing their own foundations to the table.
   3. Supporting regional convenings of multiple private and public organizations.

THE WISDOM OF THE CROWD

There was unanimous agreement among the participants of the *National Strategy Forum on Livable Communities for All Ages* that a collaborative approach to addressing the challenges and opportunities of our aging demographic is a necessity. There is shared interest in learning new ways of working across unique coalitions involving non-profits, governments, foundations, businesses and engaged citizens.

Elevating the topic of aging in America is a necessity. Local and regional governments must become aware of this urgency, be able to vision the possibilities, and implement programs in their communities.

> *"By applying innovation, collaboration and technology to convene conversations, collect information and connect people, projects and possibilities, we can tap into the benefits of an aging America for our social well-being and economic growth."*
>
> Chris Kennedy, Principal, Age2Age Consulting

The participants agreed that collaborative efforts at the national level could accelerate the sharing information, toolkits, best practices, and strategies with local leaders. AARP's willingness to serve as a convener of these efforts was applauded and endorsed.

It was clear that many of the national organizations' goals and initiatives intersect with those of other organizations. The opportunity is to identify these areas and foster collaboration that can accelerate the mutual goals of multiple organizations.

MOVING FORWARD

AARP is commited to continuing in the role of convening thought leadership, collecting information to share, and developing strategies to make life better for all generations. Specific steps will include:

1. Convening a culminating gathering in Washington DC in December to share the intelligence gained from the 2012 convenings of local government and community leaders, federal government agencies and national non-profits, and the private sector.

2. Examining the need to develop a thesaurus or glossary of terms and jargon related to livable communities.

3. Expanding AARP's new digital resource to include the resources contributed or referenced at the *National Strategy Forum* and after.

4. Designing strategic initiatives for coalitions and collaborative efforts to:
   • Advance livable communities for all ages at the local level;
   • Build relationships and engage government partners; and
   • Determine how to best work with the private sector, as well as with philanthropies and foundations.

5. Developing an ongoing mechanism to share information, partner on specific projects, and plan for joint activities.

Appendix:

    Appendix 1: *National Strategy Forum* Participating Organizations
    Appendix 2: *National Strategy Forum* Agenda

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National Strategy Forum:
Livable Community for All Ages
September 18, 2012   Washington, DC

Participating Organizations

AARP

Age2Age Consulting

Association of Area Agencies on Aging

Atlantic Philanthropies

Boomer Project

Grantmakers in Aging

International City/County Management Association (ICMA)

Intergenerational Center at Temple University

National Centers for Disease Control and Prevention (CDC)

Partners for Livable Communities

Pfizer Inc.

Smart Growth America

Stanford Center on Longevity

U.S. Department of Health and Human Services

U.S. Department of Housing and Urban Development

U.S. Department of Transportation

U.S. Environmental Protection Agency

Westchester County Department of Senior Programs and Services

AARP®

National Strategy Forum:
Livable Community for All Ages
September 18, 2012   Washington, DC

Agenda

MORNING SESSION

1. **Welcome**
   Chris Kennedy
   Age2Age Consulting, Forum Facilitator

2. **Opening the Conversation**
   Nancy LeaMond
   AARP Executive Vice President, State and National Group

3. **Being Futurists: Livable Community Visions**
   Chris Kennedy & Group Discussion

4. **What's Working? What's Needed? What's Possible?**
   Each of the following presentations will be followed by Group Discussion

   Local Programs & Partnerships: Leveraging social capital
   Mae Carpenter
   Westchester County Department of Senior Programs & Services

   National Policy & Positioning: Advocacy for Livable Communities
   Jane Hickie
   Stanford Center on Longevity

LUNCH BREAK
AFTERNOON SESSION

5. **Recap and Emerging Themes**
   Chris Kennedy & Group Discussion

6. **Work in Progress: Great Places for All Ages**
   Jennifer Wallace-Brodeur
   AARP, Acting Manager, Home & Family

7. **Final Pieces**
   Chris Kennedy

8. **Looking Forward**
   Nancy LeaMond

9. **Continuing the Conversation**
   Reception for Forum Participants