

The ADVANTAGESM *Improving Communities for an Aging Society*

Initiative UPDATE

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The *AdvantAge Initiative*

The *AdvantAge Initiative* is a community-building effort focused on creating vibrant and elder-friendly, or "*AdvantAged*," communities that are prepared to meet the needs and nurture the aspirations of older adults.

Is your community "*AdvantAged*"?

- Does it help older residents maintain their health, live independently, and lead productive and satisfying lives?
- Does it engage older adults as resources, tapping their civic and social strengths?
- Is it able to meet the changing needs of the frail, disabled and homebound?
- Do older residents consider it an elder-friendly environment?
- Is planning for a growing older population a priority in your community? Does it have reliable data to inform planning?

CONTRIBUTORS

- Mia Oberlink
- Esther Zuckerman

Center for Home Care Policy and Research – VNSNY

- Jane Clay
- Bridget Edwards
- Phil Stafford

Evergreen Institute on Elder Environments

Welcome to the first issue of the *AdvantAge Initiative Update*, a newsletter designed for the *AdvantAge Initiative* communities, our funding partners, and others interested in building elder-friendly, or *AdvantAged*, communities.

AdvantAged communities are defined as communities that 1) actively engage older adults and their considerable civic and social assets to make their communities better places to live; and 2) build community capacity to support the health, well being, and independence of all their elders, including older people at risk for disease and disability and those who are already disabled.

In the first issue of this newsletter, we introduce you to the *AdvantAge Initiative* communities and focus on one of them in particular – Puyallup, Washington. In each newsletter, we will shine a spotlight on one of the *AdvantAge Initiative* communities and share the insights, successes, and challenges that have been reported to us in their monthly field notes. Keep an eye out, also, for Phil Stafford's responses to issues raised by the communities. In "Focus on Puyallup," Phil addresses ways to make visioning exercises both enjoyable and productive.

This newsletter will be coming to you on a bi-monthly basis. The *AdvantAge Initiative* communities have many stories to tell and we look forward to sharing them with you. Enjoy our inaugural issue!

Mia & Esther

Please let us know if you or anyone you know would like to receive additional copies of this issue, or any issues in the future.

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Introducing the *AdvantAge Initiative* Communities

Chicago, Illinois:

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The northwest side of the city of Chicago is a community with a large percentage (over 25%) of residents who are 60 years old and above. It is a middle class community that has been traditionally German, Italian, and Polish, but has seen a significant increase in the Latino and first generation Polish immigrant populations. Kim Pavlock of Mather Lifeways, one of the AI liaisons, has been working closely with a coalition of seniors and local agencies to identify issues that may interfere with older residents' ability to "stay put," that is, to live independently at home. The Staying Put Committee was created to give voice to these issues and take action on behalf of all seniors in the community. The Staying Put Committee identified home repair and maintenance, as well as protection from predatory lending practices, as main concerns, and the committee has already taken steps to address them. They have developed a database of reliable and relatively inexpensive handymen that can be used as a resource for those looking for home repair help. The database is administered and updated regularly by Mather Lifeways staff. The committee is also working with the Commissioner of Housing and Christian Churches Caring, a local not-for-profit that will act as a coordinating agency, to access funds for seniors in need of home modification. This is an important addition to resources in northwest Chicago, as they did not have an agency to help eligible seniors apply for H-RAIL, the federally sponsored home modification program. In addition, the committee has enlisted local banks to assist those older residents who have unknowingly agreed to high interest home refinancing loans.

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Introducing the AdvantAge Initiative Communities

Indianapolis, Indiana:

AdvantAge Initiative Lead Agency: Central Indiana Council on Aging (CICOA)

AI Liaison:

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The leadership group of the Indianapolis, IN *AdvantAge Initiative* consists of a team of leaders from all segments of the community, assembled by AI liaison, Duane Etienne. From the very beginning, Duane has been methodical in his efforts to recruit the most diverse and comprehensive team possible, consisting of service providers, community leaders, seniors, political figures, and others. Many represent groups that do not routinely appear at the table when the focus of discussion is senior-related issues. The group includes: an architect, an interior designer, a university president, and a CEO of a substance abuse and rehab hospital, as well as many others. Though Duane is the “official” AI site liaison, he has brought in two co-chairs to help the group make progress. One of the co-chairs, Father Boniface Hardin, President of Martin University, suggested that the group (which is quite large) be broken up into manageable sub-committees, each devoted to one of the AI domains: addressing basic needs for housing, safety and security; optimizing physical and mental health and well being; maximizing independence for the frail and disabled; and promoting social and civic engagement. Each sub-committee reports back to the entire leadership group about how it feels Indianapolis is doing with respect to each of these four areas. Each group is also working to create an “action plan” that could impact public policy, philanthropic policy, and corporate policy in Indianapolis. Their recently hired visioning consultant will work with each of these small groups to sharpen their focus and bring in more voices from the community.

Jacksonville, Florida:

AdvantAge Initiative Lead Agency: United Way of Northeast Florida (UWNEF)

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With a distance of sixty miles across, Jacksonville, Florida is one of the largest cities in the country. Located in the northeast section of Florida (in Duval County), one hundred miles south of Savannah, Georgia, it is a rapidly growing community with a current population of 800,000. The population of older adults is growing just as rapidly; 184,000 people 60 years old and above live in Jacksonville. The community is predominantly white (82%), though the African-American and Latino populations are increasing steadily. In response to the community’s current growth, and the changes in the population that are foreseen for the future, the United Way of Northeast Florida (UWNEF) has been working with community leaders to identify the issues that will affect Jacksonville in the coming years. After many months of discussion and community input, it was decided that UWNEF, our AI liaison, would focus its attention on a “Senior Initiative” over the next ten years, and beyond. Issues relating to and affecting seniors will be the primary focus of this initiative. Five committees were created to begin studying the issue, each led by a volunteer holding a prominent position in the community (educators, agency directors, CEO’s, business leaders, and others). Their work included taking an inventory of current programs and services for seniors and putting them into a database, researching possible funding sources for future programs, and conducting focus groups with seniors and caregivers. Results of the *AdvantAge Initiative* survey will serve as an important source of information to inform planning and implementation of the Senior Initiative.

FOCUS ON PUYALLUP:

A Conversation with David Hanson

Note: Shortly after AdvantAge Initiative team members Mia Oberlink, Esther Zuckerman, Phil Stafford, and Jane Clay visited the Puyallup AdvantAge Initiative in July, the Puyallup Initiative's lead person, David Jensen, was notified that his position at Good Samaritan Hospital (the lead institution for the Initiative) had been eliminated. This was alarming news for David personally, as well as for the Initiative. In the weeks before his departure, David Jensen took steps to ensure that the transition to new leadership would be seamless. David Hanson, who worked alongside David Jensen on the project, stepped in and took the lead. In this interview with David Hanson, we explore issues surrounding the transition and the Initiative's progress since that time.

AI: Losing the person who convened the Puyallup Initiative's task force must have been quite a shock to the Initiative. Can you describe what happened? Why didn't it fall apart?

David Hanson: It has a lot to do with the way the task force developed over the preceding 6-7 months. All the members had a relationship with David Jensen and with Good Samaritan. Good Sam is seen as a good "citizen" in the community, and the type of people David had asked to join the task force would not just cut and run. This wasn't only David's project, and although Good Sam was, and still is, the lead agency, it wasn't the only agency. The project was a community partnership. Good Sam staff members working on the project, particularly Teresa Keogh, were able to take an active role in keeping things afloat. As the other lead team member, I was able to jump into the void to help the project stay on an even keel. We never missed a meeting. We worked with David J. to make a smooth transition and took pains to communicate with the rest of the group. We stressed that since this was a partnership, it could survive, if it behaved like a partnership.

AI: How do you see your role now, David?

David Hanson: I am the lead contact, and I share day-to-day responsibilities with Teresa Keogh. With support from Jolene Rogers, we coordinate everything: assignments to carry out, delegating, etc. In addition, people have stepped forward to volunteer their time. This is happening more, now that there are concrete things that they can do (such as distribute fact sheets to senior housing sites, work with the newspaper to cover our project, etc.) We still have challenges getting work done, but this probably relates more to the project itself than to David's departure. We need task force members to take on new duties related to the project, and as we look to expand the task force membership, we'll recruit people from the community who can devote time to these activities.

AI: You work in Tacoma and don't live in Puyallup. How does this affect the way you lead the Initiative?

David Hanson: You're right, I don't live in Puyallup. I brought this up to the steering committee right away. But most of the steering committee members are Puyallup residents, and it doesn't make any difference to them. In some ways, it may be an advantage to the Initiative because I can give the Initiative visibility outside the community. Within Puyallup, the other task force members are the visible ones. When an article in the paper was written about the Initiative, I was interviewed, along with Teresa and another key member of our group, Kathy Turner (Deputy Mayor of Puyallup). Teresa and Kathy were the ones quoted in the article. Things like that keep the project at home. I am careful not to identify the project with my employer (Pierce County Human Services Aging and Long-Term Care), but instead with Good Sam, the lead agency in Puyallup.

AI: How does this work with your employer? How much of your time is devoted to the Initiative?

David Hanson: I have always had the support of Pierce County Human Services. My supervisor sees this project as very important not only for Puyallup, but for planning in Pierce County, as well. The project has always been viewed as worth the time investment. About 25% of my time, and 20% of Teresa's and Jolene's time, are devoted to the Initiative.

AI: What has been the easiest part of the Initiative for you, so far?

David Hanson: Communication. I think we've done a good job of pulling it together and getting the word out to the proper outlets. I am also enjoying the opportunity to think in broader, more theoretical terms, about themes that have been coming out of the task force's visioning process.

AI: What has been difficult?

David Hanson: Keeping the ship together, keeping people involved. That was a particular challenge at the beginning. Not a lot of people attended some of the meetings. This is, I think, the nature of the beast, and not a result of David's departure. The project was pretty abstract, and it was hard to keep people involved. That's not entirely resolved, but now that we have concrete jobs to do, it's easier to get people going. The site visit also helped the task force see the Initiative's potential, and they became more engaged. Everyone came to the meeting, and people were excited.



Advantage Initiative Task Force members: (left to right) George Duncan, Jolene Rogers, (AI Liaison), David Hanson, Ph.D., (Lead AI Liaison), Rick Campbell, Kathy Turner, (Deputy Mayor) and Bob Kastama.

Envisioning an Elder-Friendly Puyallup

*“If you don’t have a vision,
if you stay down too close to the earth all the time,
then you can’t see where you are.”*

Jonathan Hale in The Old Way of Seeing

Visioning exercises help members of a group or team create a shared, preferred future; clarify and focus on what they truly value; and inspire team members to work toward their “ideal” future. In his field notes, *David Hanson* has written about the series of visioning exercises that the *AdvantAge Initiative of Puyallup’s Task Force* has been conducting. With the help of *Joni Greathouse*, a consultant retained by the task force to facilitate the discussions, the task force spent a recent session focusing on Puyallup’s past.

David writes, “*Task force members shared impressions and information about the community as it exists in their memories.* Participants seemed especially engaged in this activity, and it became clear that fundamental changes have occurred in Puyallup, particularly in the past twenty years.

“Task force members commented on the growth of commercial and residential development in what had been farmland and rural areas, the loss of locally-owned businesses and personal contact they had enjoyed with familiar merchants, the spread of corporate retail outlets, and the bifurcation of the

community (South Hill as one sector and the “valley” or “downtown” as the other) due to population growth.

“They also recalled a time when one’s house could be left unlocked and that a “strong sense of community” existed in the “valley.” Interestingly, a task force member who had moved to Puyallup in the 1960s and worked in the social service field recalled that seniors were not actively engaged in community life at that time. And a number of members commented on the increase in services for older adults in recent years, highlighting Good Samaritan Hospital’s community outreach efforts.

“Other themes that emerged included:

- Feelings of loss for a time and place that was safer and marked by a stronger sense of community
- The challenges in becoming a more diverse community in recent years
- A tradition of pride in Puyallup’s institutions (schools, hospital, the Fair, etc.)
- Increased prevalence of social class distinctions in the 1980s and 1990s”

QUESTION:

How will the task force members use the information and perspectives expressed about the past to inform the tasks that lay ahead?

Phil Stafford, an AdvantAge Initiative team member from the *Evergreen Institute* of Bloomington, IN, offers the following advice to ensure that visioning exercises about the past have a clear purpose and contribute to a broad-based discussion about the community’s envisioned future.

Phil Stafford: “In his field notes, David provides a terrific illustration of the *value of having task force members relate to the past before getting too heavily into the present and future.* This will help prevent the “we’ve never done it that way before” saboteurs from shooting you down. With Joanie’s help, the Puyallup folks had a productive visit to the past that helped set the stage for the next step in the visioning process.

“To help assure that such conversations will inform their developing visions of the community’s future, make sure that participants go beyond simple reminiscing. *The reflective component of the exercise is most important, for it asks people to assume a critical attitude about the past and not be swayed by nostalgia.*

“Therefore, encourage people to state what their memories mean to them. For example, do happy memories about the past make them feel pessimistic about the future (e.g. “It will never be that way again!”)? Do they believe that some people dwell in and romanticize the past (e.g. “It’s just a myth; it really wasn’t like that, but just appears so after the years have passed.”)? Or do the memories serve as a call to action (e.g. “This conversation about the past makes me want to redouble my efforts to improve our community.”)?

“In the course of discussions about the past, help participants summarize the good, the bad, and the ugly and decide together which elements from the past they want to keep or recapture and those they would rather live without in the future. This will provide a more solid base for discussing the current state of affairs (reflected in your survey results and other participation projects you may sponsor) and for discussing and creating a vision for the future.”

PUMP PRIMERS*

*SEE STEP 2

- As a child of 12 yourself, how many living grandparents did you have? (great-grandparents?)
- As children, where did your grandparents live (rural, small town, city, suburb)?
- Now tell us about the occupations of your grandparents (then parents, then you)
- How many children did your grandparents produce (then parents, then you)?
- How far did your grandparents advance in school (then parents, then you)?
- What did your grandparents do to support themselves in old age (some should precede Social Security!)?
- What did it mean for your family when Social Security was instituted?
- What caused the death of your grandparents? At what ages did they die? How long were they ill and what was done to treat them? Where did they die (at home or in hospital)?

Revisiting the Past Through a “Fishbowl” Discussion

Here’s an idea for an exercise focusing on a community’s past that you can use with your task force or any other community group you think needs to be involved and “on board.” This exercise involves a group interview led by a couple of prepared volunteer interviewers, who have met beforehand to come up with good questions that will reveal generational differences in the status and lifestyles of elders over the last 75 years.

STEP 1:

Select two representatives from each of three generations to be “in the fishbowl:” e.g. two persons 75+, two baby boomers, and two twenty-somethings.

STEP 2:

Look in the box (left) for some **pump primers** – questions to stimulate the people in the “fishbowl” to tell stories. Encourage the rest of the task force to ask questions along with the interviewers. Keep the “Four Circles” Chart of Domains and Dimensions in view so that questions can be aligned with the domains of a healthy community. Talk for about 30 minutes and then take a break.

STEP 3:

After the break, for about 15 to 30 minutes, reflect on the session by posing some of the following questions. Create a “mind-map” of trends on a mural, or just list people’s statements on newsprint as they talk.

- How have the demographics (population characteristics) changed over time (e.g. number of elders per adult child, per young child; geographic dispersion of families)?
- How have the lifestyles of elders changed over time (e.g. occupations, pursuits in old age, education, etc.)?
- How have government supports for old age assistance changed?
- How has the illness experience of elders/families changed over time?
- How has the community experience of elders changed over time (e.g., city/rural/small town vs. suburban/age-segregated communities)?

STEP 4:

In the final segment (15 minutes), try to summarize with some qualified statements about what was better, what was worse. What worked then that wouldn’t work now? Why? As a community, what would we want to preserve, what would we want to change?

Introducing the AdvantAge Initiative Communities

Lincoln Square Neighborhood, New York, NY:

AdvantAge Initiative Lead Agency: Lincoln Square Neighborhood Center

AI Community Liaisons:

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The Lincoln Square Neighborhood NORC (Naturally Occurring Retirement Community) became part of the *AdvantAge Initiative* this past summer. With the assistance of Fredda Vladeck, Director of the Aging in Place Initiative of the United Hospital Fund, Lincoln Square was identified as the NORC that would be one of two pilot AI communities in NYC. With over 50% of its population consisting of seniors, Lincoln Square was designated a NORC in July 2000. This community consists of 15 buildings, 14 of which are public housing managed by the New York City Housing Authority (NYCHA). The 15th building is a private co-op. Approximately 600 seniors (65 years and older) live in this complex. Many of them had settled into this community long ago, raised a family, and are growing older in a familiar place. Services provided to the seniors as part of the NORC program include social work counseling and case management, nursing assessment and screenings, and home health care workers on site. These services are provided through the Lincoln Square Neighborhood Center, where Stephanie Pinder is Executive Director and Joanne Ricco is Director of the NORC. In order to engage its buildings' residents and community neighbors further, they have established one advisory council that consists of seniors representing each building, and another advisory council that is made up of community leaders, local businesses, and a number of community based agencies. They have also worked hard to reach the seniors to advertise AI through their monthly mailings, in person visits, and recreational and educational programs that are provided on site.

Puyallup, Washington:

AdvantAge Initiative Lead Agency: Good Samaritan Hospital

AI Community Liaisons:

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Jolene Rogers: (253) 435-3930; rogerjo@goodsamhealth.org

Puyallup, Washington is a city located 40 miles southeast of Seattle, Washington. It is a thriving community with approximately 16,000 residents aged 60 and older. Good Samaritan Hospital, the lead agency for Puyallup's *AdvantAge Initiative*, recently reconfigured hospital programs, and, as a result, a number of workers were laid off, including *AdvantAge Initiative's* liaison, David Jensen, and other task force members. However, because of David's leadership skills and his commitment to the AI, the Puyallup Task Force survived the transition to new leadership and is thriving. David Hanson is now the primary liaison. In "Focus on Puyallup" on page 3, David Hanson describes the leadership transition process and how challenges were overcome. The Puyallup Task Force has also been engaging in a series of visioning exercises. A recent one entailed a "look back" at the community as it used to be, and as it is remembered by the task force members. "Envisioning an Elder-Friendly Puyallup", on pages 4-5, also provides some insight into the task force's visioning activities. Local fundraising for AI-related expenses is another example of the hard work being done by the Puyallup Task Force. For example, they already have a commitment of \$5,000 from a local non-profit organization that provides affordable housing to seniors, and another \$5,000 from a thrift shop run by the seniors of Puyallup. These fundraising successes not only ensure that the task force's hard work will continue, but represent a "stamp of approval" from other community groups and organizations.

Introducing the AdvantAge Initiative Communities

Santa Clarita, California:

AdvantAge Initiative Lead Agency: Santa Clarita Valley Committee on Aging (SCVCOA)

AI Community Liaisons:

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The *AdvantAge Initiative* team visited Santa Clarita, CA in late August. We were amazed at the topography of this community, its canyons, and the enormity of the area under the purview of the Santa Clarita Valley Committee on Aging (SCVCOA) – the lead agency for the AI. The rural nature of this community, its vast area, unique topography, and lack of a comprehensive transportation system present challenges to SCVCOA and other service providers. However, the AI liaisons in Santa Clarita – Brad Berens and Donna Payne – have been working closely with many community agencies and leaders to help define what a more elder-friendly Santa Clarita would look like and how to reach those residents who do not live close to the “center” of the city. In fact, the SCVCOA has recently formalized a collaboration with the North Los Angeles County transit provider to plan for a more efficient transportation system for seniors throughout the community. Santa Clarita also has been working to engage community members in a long-term planning process called “One Valley, One Vision.” This initiative is using focus groups, visioning exercises, and surveys to help policymakers identify priorities in the community (both city and county) and develop plans to address them. The mayor of Santa Clarita as well as other city council members are enthusiastic about the AI survey and believe the results will not only provide them with valuable information about older residents, but will also supplement and enhance their “One Valley, One Vision” strategic planning process. In addition, Brad has joined an LA County-wide group that will be working on the strategic plan for Long Term Care for the Aged and Disabled. The group’s planning process will entail a complete analysis of current LTC services, with special attention paid to gaps and duplications in service. The group will also formulate recommendations for the implementation of any service changes or additions.

Yonkers, New York:

AdvantAge Initiative Lead Agency: Yonkers Elder Friendly Initiative (YEFI)

AI Community Liaisons:

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Located approximately one half-hour north of Manhattan, Yonkers, New York, is a diverse community in many ways. It is a city of just twenty square miles, but has thirty-eight distinct neighborhoods. Each of these neighborhoods adds to the city’s character and diversity. The AI liaisons in Yonkers, Mary Hotte and Cathy Elser, have brought together a task force that is as diverse as the Yonkers neighborhoods themselves. As in many of the other communities, the process of building and sustaining a task force is a work in progress that continually presents challenges and opportunities to recruit new voices to the group. The Yonkers Elder Friendly Initiative (YEFI) recently held a well-attended conference entitled, “Asset-Based Thinking: Mining Community Resources.” A goal of asset-based community building is to identify and mobilize the skills, knowledge, values, resources, and commitment of all members of a community. The conference showcased speakers with national reputations and expertise in asset-based community development as well as representatives from local agencies and coalitions that have successfully used this approach in their own neighborhoods. At a recent task force meeting, Cathy reported on her other activities to engage the voices of Yonkers seniors. She presented the feedback that she has received from many of the hundreds of seniors she has spoken to across the city. In the last several months, she visited *sixteen* parks and recreation sites, *six* nutrition sites, and *four* senior housing apartment buildings. Her goal was to interview seniors about their perceptions of Yonkers as a place to live for older people, to find out about those aspects of the community they enjoy, and the daily challenges they face. The seniors at the visited sites reported that they liked the senior activities that the community provides, its proximity to New York City, and the accessibility of transportation, shopping, and libraries. Cathy and Mary will soon begin to use focus groups and other research tools to reach community residents who *were not* represented in these initial interviews.

****Orlando, Florida, the newest AdvantAge Initiative community, will be introduced in the next issue. The lead agency and contact people for this community are Winter Park Health Foundation; Paulette Geller, (407) 629-5771 ext. 2223, pgeller@wphf.org; and, Cathy Lieblich (407) 629-5771 ext. 2227; clieblich@wphf.org.**

About Us

Established in 1993, the Center for Home Care Policy and Research-VNSNY works to advance knowledge that will promote the delivery of high quality, cost-effective care in the home and community, and support informed decision-making by policy makers, providers, and consumers.

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The ADVANTAGESM Initiative

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