

# The ADVANTAGE<sup>SM</sup>

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
- Danylle Rudin
- Esther Zuckerman

Center for Home Care Policy and Research – VNSNY

- John Beilenson
- Strategic Communications and Planning

- Jane Clay
- Bridget Edwards
- Phil Stafford

Evergreen Institute on Elder Environments

**We've been very busy** over the past months, and by the time you receive this newsletter you will have much of the results of our labor. The entire *AdvantAge Initiative* team has been focused on providing analyzed data for each of the 33 indicators for each of the ten communities, as well as a demographic breakdown of each of the communities. See the centerfold of this issue for a sample of the data.

Phil Stafford and John Beilenson have complemented our work with a series of articles and exercises that comprise a Technical Assistance Toolkit. The materials help explain the indicators, survey results and possible interpretations, as well as ways to present them to and discuss them with various community stakeholders. Many of you have told us this information has been helpful in interpreting the data and thinking about next steps.

Each of the communities is using the data it has received in different ways. Some have found it helpful in their advocacy efforts, others in allocating resources, and others in program planning. Still others are using the data from specific indicators to set targets for service levels and community change.

You can learn more about what has been happening in two of our communities – the Lincoln Square Neighborhood NORC and Orange County, Florida – in the pages that follow.

*AdvantAge Initiative* project team members have also made a number of presentations at conferences using AdvantAge survey data, including: the New York State Society on Aging conference in Albany, along with Yonkers and Lincoln Square staff; the annual meeting of the Gerontological Society on Aging in Boston; and at the recent ASA/NCOA conference in Chicago.

Now that most of the survey results have been analyzed and disseminated, we are putting the finishing touches on our new survey effort – a national AdvantAge survey of adults aged 65 and older. We have contracted with International Communications Research (ICR) to conduct this random digit dial survey using the same instrument we used in the ten pilot communities, and plan to survey more than 1200 adults all over the country. We'll keep you posted on our progress.

Our *AdvantAge Initiative* website is also in the works and should be up and running this spring. In the past several weeks, many of you have been interviewed about your community's recent AdvantAge-related activities. This information will appear on the website as community profiles – highlights of activities in each community – and will be updated periodically to reflect the ongoing efforts within each of your communities. The website will also include technical assistance materials, updates on our national survey, and data highlights. Check it out soon at [www.advantageinitiative.org](http://www.advantageinitiative.org).

We are also working with Community Partnerships for Older Adults, a new program sponsored by the Robert Wood Johnson Foundation (RWJF). Our experience working with the ten AdvantAge communities has taught us a lot and we are looking forward to providing data analysis and technical assistance to the Community Partnership grantees.

Thanks to a grant from RWJF, we have just completed a publication entitled *Best Practices: Lessons for Communities in Supporting the Health, Well-Being, and Independence of Older People*. This publication contains profiles of 17 successful community initiatives from across the nation and Canada and a synthesis of lessons learned from these efforts. This publication will be available on the AdvantAge Initiative website soon.

Research for *Best Practices*, feedback from our presentations, and word of mouth have identified many communities across the country that are interested in improving their elder friendliness capacity. So, we are working on plans to help many more communities gather and use consumer-focused data and other information to increase their responsiveness to aging citizens, raise awareness about aging issues, set community priorities, and create community action plans to increase their capacity to support a growing population that wishes to age in place.

As busy as we've been, we know that you've all been busy as well. As always, we look forward to hearing from you about AdvantAge activities in your community.

Mia and Esther

# Lincoln Square Neighborhood Center Organizes to Protect Funding for Local Older Adults

The Lincoln Square Neighborhood NORC is a Naturally Occurring Retirement Community on the Upper West Side of Manhattan. NORCs are residential areas where people have aged in place and a large proportion of residents are over 60 years of age. In New York City, a NORC is a building or other residential area where at least 45% of households are headed by individuals aged 60 and over, or where at least 500 people aged 60 and over reside.

This *AdvantAge Initiative* site is home to more than 800 older adults, most of whom live in 14 public housing apartment buildings in the Lincoln Center area. Most older residents have lived in the neighborhood for decades; almost all depend on the Lincoln Square Neighborhood NORC Supportive Service Program (LSNC) for a full range of services and activities that are vital to their health, well-being and happiness. LSNC directly provides or coordinates care or educational programs with its partners, which include local health care agencies, social service providers and others.

Unfortunately, this lifeline for area seniors, like the 28 other NORC programs around New York City, is now under attack. Though spared in New York City Mayor Michael Bloomberg's initial budget proposal, funding for the LSNC NORC may be threatened by the austere budget described by New York State Governor George Pataki earlier this year.

In response, LSNC has teamed with a variety of nonprofit and private partners in their neighborhood and across the city to launch a multi-faceted advocacy campaign. Their goal? Stave off any budget cuts to the NORC and strengthen relationships with key elected officials, funders, decision makers, community partners and the media.

## Sending the Love

After a brief planning and strategy phase in January, facilitated by *AdvantAge Initiative* consultant John Beilenson, LSNC's seniors sprang into action, creating a Valentine's Day outreach to elected officials at City Hall and in Albany. LSNC also saw this as an opportunity for intergenerational interaction. Young people who participate in LSNC's youth programs worked with seniors to create 800 hand-made Valentines. Most bore the message, "Be a Sweetheart and Keep Fighting for Our Programs," and were sent to City and State officials



who have been supportive of senior services in the past. Another group of approximately 200 cards, which said, "Don't Break My Heart, Save Our Funding," were sent directly to Governor Pataki.

In Manhattan, a group of LSNC seniors hand delivered 200 of the "Sweetheart" Valentines to Mayor Bloomberg at City Hall, who was visibly pleased by the message and by the initiative the seniors took to bring it to him. He spent 15 minutes talking to the group, had his picture taken with them, and promised to visit Lincoln Square later in the Spring.

## Contacting Decisionmakers, Engaging Partners

Building on this outreach, LSNC executive director Stephanie Pinder and a handful of seniors testified in front of the City Council in March about the role that NORCs play in the lives of seniors. She incorporated *AdvantAge Initiative* indicators into her remarks.

In April, LSNC will begin rolling out its *AdvantAge* data as part of its broader efforts to educate local partners and elected officials about the needs of older adults and the work of the NORC. This will begin April 3 at a meeting of Upper West Side clergy, who will be asked both to join in the campaign to preserve NORC funding, and to seek new ways to provide services and activities to area elders.

And *AdvantAge Initiative* survey data from this community are striking. In the Lincoln Square NORC, one out of seven (14%) of people age 65 and older say that in the past twelve months they or another adult in their household cut the size of

(continued on page 8)

# FOCUS ON ORANGE COUNTY, FL:

*Note: We interviewed Paulette Geller with the AdvantAge Initiative of Orange County, Florida to learn about their workshop series exploring the survey data they are receiving about their community from the AdvantAge Initiative.*

*Their framework is based on the “Identifying and Framing Issues” exercise led by Phil Stafford at the June, 2002 All-Community Meeting in New York City. The purpose of the exercise is to use the AdvantAge survey data to identify problems and issues and to frame them in ways they can be addressed by a variety of community stakeholders. (See the July/Aug – Sept/Oct 2002 issue for more information.)*

*Adapted from Framing Issues: Building a Structure for Public Discussion (1995, Kettering Foundation), the series of questions developed by Phil to identify and frame issues related to the survey data and indicators includes:*

- What is the real issue? How can we simply “name it” or re-state it?
- Is this issue at some kind of crisis proportion in our community?
- Does this affect a broad or narrow cross-section of our community?
- Who is the most affected and how are they affected?
- Who is the least affected by this issue?
- Is there a quick, technical solution to this problem?
- Is this an issue someone or some group is already working on?
- Is this a multi-sided, complex issue?
- Is this issue connected to things people really care about?
- Is the solution to this problem relatively clear?
- Is this an issue that will require further study to better understand?
- Is this an issue that will require lots of political will to address?

**AI:** Before we talk about how you are framing the issues in Orange County, tell us how you’re “framing” the AdvantAge Initiative.

**PG:** We call it “Celebrate Vital Aging: Creating Our Community for a Lifetime” which incorporates the language used by the Florida Department of Elder Affairs. It’s age neutral and folks finally get it. Cuts in the sidewalks are as important for strollers and bicycles as they are for wheelchairs and walkers. Communities are for everyone.

**AI:** Why did you decide to implement a series of “Frame The Issues” workshops?

**PG:** We saw the potential of the frame the issues exercise when all the AdvantAge communities convened in New York last June and decided we wanted to adapt it for our use. We see the framing process as a fruitful and effective way of coming to mutual understanding and, eventually, getting the buy-in that we’ll need to move to action.

**AI:** Who do you think belongs at the table? Whose opinion counts here?

**PG:** We want funders, service providers, planners, advocates, seniors, politicians and the business community involved in thinking about the AdvantAge data, the issues it brings up and

what we can all do about it. And of course, we’re hearing from the elders in our community – it’s their voices that are speaking to us through the data.

**AI:** Who gets invited to the workshops?

**PG:** Each time we plan a workshop we ask ourselves two questions – Who has knowledge about the issues and who has the influence to effect related changes? Based on those answers, about 70 people were invited to come to our first workshop. Thirty-two of them accepted! And we learned the first time that this is as large a group as can participate in this type of process in a meaningful way.

**AI:** What happens in the workshops?

**PG:** First we present data on no more than three indicators related to an issue. Then, participants work in small groups to synthesize what they’ve learned about an issue into problem statements and identify possible approaches and strategies that could address the statements. The small groups then come together and vote on the issues they think are most important and identify the effective strategies that are most doable.

This is the Kettering Process, which we learned about in the meeting in New York. We’ve hired a professional facilitator who developed a “Participant Booklet” that clearly lays out the

*(continued on page 7)*

# The AdvantAge

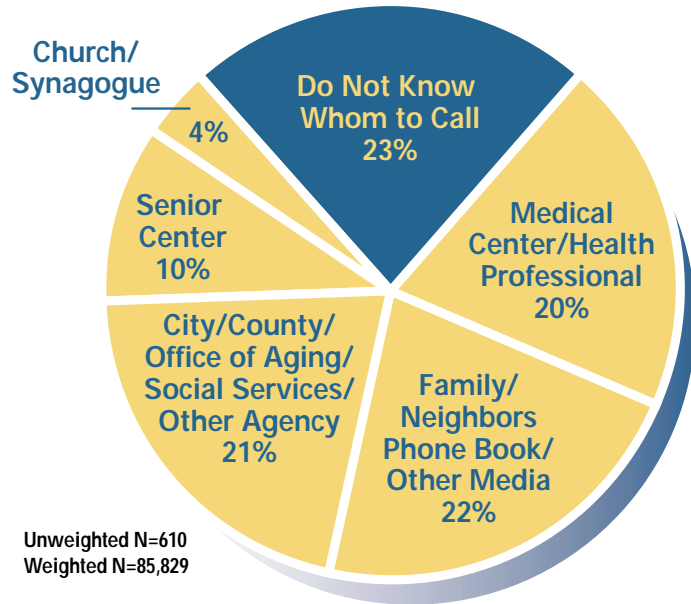
## Examples of AdvantAge Survey Data, Problem Statements & Potential Solutions

### AdvantAge Data

Percentage of people age 65+ who do not know whom to call if they need information about services in their community

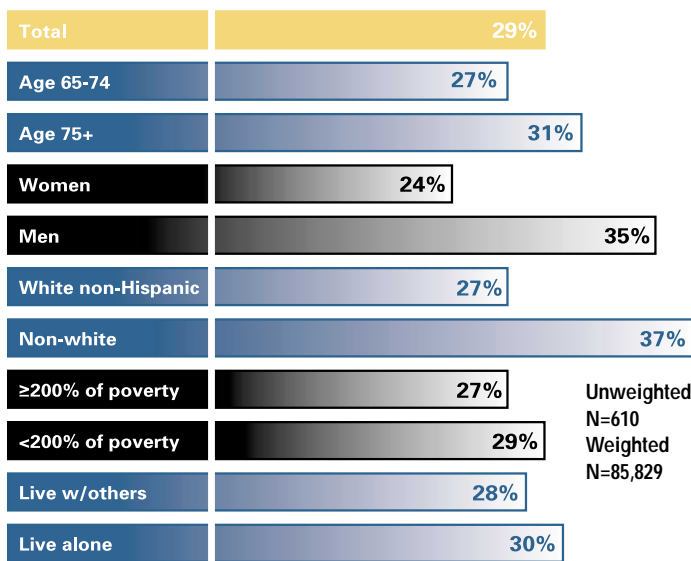
#### Indicator 8

Overall, nearly one of four (23%) people do not know whom to call if they need information about services in their community. Twenty-two percent mention family (3%), friends (2%), media sources (7%), or the phone book (10%). One of every five (20%) adults age 65+ say they would turn to a health care professional or a medical center for information about services in their community. Another one-fifth (21%) mention city or county agencies, and one in ten (10%) name a senior center as their source of information.



### AdvantAge Data

Percentage of people age 65+ who are unaware of most selected services\* in their community, by demographics



\*Most selected services is defined as 5 or more services. Respondents were asked whether the following 9 services are available in their community: Respite; Home repair service; Homemaker service; Home health aide; Congregate meals; Hospice; Senior Center; Visiting Nurse; Meals-on-wheels.

#### Indicator 9

This figure shows the percentage of people age 65+ who are unaware of most (five or more out of nine) services in their community. Overall, three of ten (29%) people are unaware of most services. This figure also shows differences by demographic characteristics. The following groups of people are more likely than their counterparts to be unaware of most services: people age 75+ (31%); men (35%); and non-whites (37%). The difference in awareness is minimal within the poverty status and household type categories.

### PROBLEM STATEMENT

Lack of awareness of services is a growing problem for non-whites, males, people age 75+ and affects communities by underestimating responses to real needs.

### POTENTIAL SOLUTIONS

- Target marketing of 2-1-1 and services to diverse, unaware populations.
- Create 2-1-1 implementation that integrates services with community outreach and timely and accurate information.
- Institute collaborative marketing strategies for individuals, families, employers and community organizations.

# Initiative Survey

## Practical Solutions From a *Frame the Issues* Workshop in Orange County

### PROBLEM STATEMENT

Not knowing where to call for services is a growing issue that affects older adults, caregivers and their children by delaying access to services, which can result in increased physical, mental and emotional problems for all of those involved. It diminishes quality of life. It affects the community by creating: 1) inappropriate calls for emergency services; 2) misdirected calls to agencies; and 3) increased financial burdens in health care and long-term care.

### POTENTIAL SOLUTIONS

- Move forward with a fully integrated 2-1-1 (County-Wide Information and Referral) system.
- Include older citizens and those who refer seniors to services as target markets for 2-1-1 system.
- Educate the public about the purposes and limitations of the 2-1-1 system.
- Educate potential referral sources about availability of services.

### PROBLEM STATEMENT

Not knowing where to call for services is a growing issue that greatly affects older adults and those without friends in the neighborhood. People are having difficulty getting services they need and are often frustrated by the cost of services and under funding.

### POTENTIAL SOLUTIONS

Develop specific services to reach more people in the neighborhood.

Develop a model for elder care that includes a model for elder care, trained I&R specialists, and a support system.

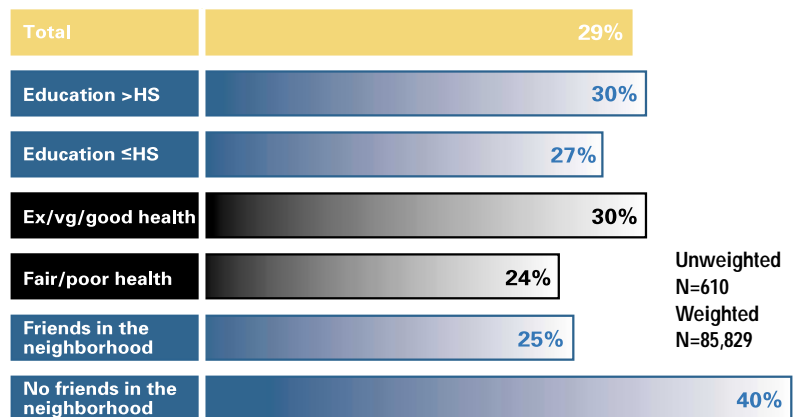
Develop a system of services to inform and educate service providers.

### Indicator 9

This figure shows additional differences by demographic characteristics. People age 65+ without friends in the neighborhood are more likely to be unaware of most services than those with friends in the neighborhood (40% vs. 25%). People in excellent, very good, or good health (30%) are more likely than those in fair or poor health (24%) to be unaware of most services. The difference in awareness is minimal within the education category.

### AdvantAge Data

Percentage of people age 65+ who are unaware of most selected services\* in their community, by demographics



\*Most selected services is defined as 5 or more services. Respondents were asked whether the following 9 services are available in their community: Respite; Home repair service; Homemaker service; Home health aide; Congregate meals; Hospice; Senior Center; Visiting Nurse; Meals-on-wheels.

# The Future Me

## A Successful Aging Resource for Individuals and Communities

Everywhere we turn, it seems, there is information about healthy aging. Articles in the paper, health spots on TV, brochures in our doctors' offices – all tell us: don't smoke, drink moderately, exercise, get your sleep, eat right, watch your weight...it goes on. Even if we don't always resist that high cholesterol cheesecake or do that workout, we know the litany.

And, thanks to our efforts as well as unprecedented advances in health care, we're living longer and healthier. Life expectancies creep upwards. Disability rates edge downward. Indeed, if we live until 65, demographers tell us we will *on average* live almost another two decades. For many older adults in our communities, the real question today is not how do I add years to my life, but rather how do I add life to these extra years?

A new resource, written by AdvantAge consultant John Beilenson, may help. *The Future Me: Authoring the Second Half of Your Life* is a guided journal that enables adults of all ages to begin understanding and exploring what to do with this "other half" of their lives.

Based on a growing body of research on the psycho-social, emotional and spiritual factors associated with successful aging, *The Future Me* helps people consider the changes – and opportunities – that come with getting older. In particular, it relies on written exercises to help readers enrich relationships, set out on new adventures, consider work and volunteer options, and stay emotionally healthy.

While this "guided journal" is designed for individuals, Beilenson has used the material and activities in groups and has presented information on successful aging and *The Future Me* at an AdvantAge presentation in Yonkers, New York.

The book has a wealth of interactive exercises that can help people of all ages in a community explore several of the AdvantAge indicators focused on promoting social or civic engagement. When conducted in a group, the exercises help participants explore their own values, hopes and beliefs about aging well in a community, encourage them to share their ideas with others, and help the group create a blue print for how the community can promote common ideals, as well as opportunities for individual growth.

Notes Beilenson, "The book is not just for the individual reader. Yes, the exercises can be done by people on their own, as they explore their own aspirations for their future. But they can also be used with small groups, planning and steering committees, and as visioning exercises to open peoples' minds to the possibilities of healthy and vibrant aging."

Indeed, *The Future Me* takes readers along six pathways to aging well. These include:

- **Improve your Attitude:** Stay positive, get "gutsy," consider the advantages of being older. Create (and fulfill) your vision of the ideal older adult.
- **Just Connect:** Avoid social isolation, make new friends, and connect with loved ones and family members, even mend fences.
- **Get Involved:** Take up the opportunity to learn new things, follow a long-ignored passion, start a new career or business or make a lasting contribution to your community.
- **Stay Sharp:** Learn memory-boosting activities, and ways to sharpen your mental acuity.
- **Be Creative:** Discover ways to give simple everyday activities new life. Do the thing or things you always dreamed of doing.
- **Engage the Spirit:** Take stock of the "big picture." What will you "pack" for the journey ahead? What will you leave behind? What is the meaning of *your* life.

## Denial and Aging

Through the development and marketing of the book, Beilenson has learned that people of all ages are in denial about aging.

"They are not in denial about the fact that their bodies are getting older," he explains. "They look into the mirror every day and know that reality. Psychologically, however, many people refuse to associate themselves with aging or older people. At some level, it is very dangerous to accept that you are a senior citizen, whether you take the discounts or not. Until these associations change, a little bit of denial is likely healthy."

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# FOCUS ON ORANGE COUNTY, FL:

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## Implications for Communities

This denial, however, prevents us from preparing adequately for the psycho-social challenges of aging well. More broadly, it has important implications for those of us interested in creating “elder-friendly” communities or perhaps, better communities for people of all ages. “We have to find strategies and language,” he says, “that either frame our issues as ‘adult’ or ‘family’ issues or that consciously highlight the active, engaged lives the majority of older adults live, and their continued vital connections to spouses and partners, family, friends, colleagues and the greater community.”

Activities and communications, he says, that are obviously focused on “senior citizens” or “frail elders” may send an unintended message to people in their 40s, 50s, 60s and even 70s that this is not for or about them. “No matter what your age,” he notes, “‘old’ means someone who’s older than you. We all know of a senior citizen in his or her 80s who won’t go to a senior center because it’s for ‘old people’”.

In most communities, community leadership is comprised mostly of the younger age cohort, people who may not be as tuned into the needs of people in their 60s and beyond, or how to communicate the importance of healthy and vital aging to people of all ages. Says Beilenson, “Connecting aging initiatives to other issues older adults and others in the community care about – children, the environment, jobs, real estate values, etc. – is one way to get people thinking about aging and the ways our aspirations and roles change as we grow older.”

In helping individuals and community groups focus on the potential as well as the challenges of the second half of life, *The Future Me* is a valuable resource in considering and planning for what can be a rewarding and exciting phase of our lives.

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*The Future Me*, retails for \$12.99 and is published by Peter Pauper Press. It is available at Strategic Communications & Planning in Malvern, PA (610) 647-0965 or you can order it directly at [www.thefutureme.com](http://www.thefutureme.com). It is also sold at Barnes & Noble and other bookstores everywhere.

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goals of the workshop and instructions on how to do the exercises. Each workshop lasts about three hours, except for the one on optimizing physical and mental health, which will be an all-day session.

**AI:** How many workshops are you planning to have, and where are they held?

**PG:** We’ve scheduled 11 workshops to take place between January 16 and the end of June. The workshops take place at different venues around Orange County for geographic mix and convenience, but our local AAA (Senior Resource Alliance) is hosting several of them because they’re centrally located.

**AI:** What will happen with all the information you’re gathering from these workshops?

**PG:** We’ll organize a meeting among funding sources sometime this summer at which we’ll review workshop results, set priorities and develop action plans. Finally, we will prepare a written report, and present it to the community for their input and suggestions.

**AI:** I know you’ve only held one workshop at this point, but any “lessons learned” so far?

**PG:** Yes! First, people like the small group format of no more than 8 people per break-out group. We also learned that we needed to give people more than the survey data and indicators. They want to see the actual questions that the telephone respondents were asked. And we treat people well in return for their participation, which they appreciate. We have good refreshments and snacks and comfortable places for them to sit during the workshop. People also like morning sessions. It’s sometimes easier for them to clear a morning on their calendars, and we want fresh brains at the table. Good strong coffee helps, too!

**AI:** Do you do any follow-up after each workshop?

**PG:** Absolutely! All participants receive a thank you letter from us and a “raw data” summary of what we learned and identified at the workshop. This helps close the loop after each workshop. We will also post workshop outcomes on our website, and this will help to keep the momentum going.

*The AI of Orange County is sponsored by the Winter Park Health Foundation in collaboration with the Orange County Commission on Aging, Senior Resource Alliance, and the Delta Leadership Council. For more information on Winter Park Health Foundation and its AdvantAge Initiative, go to their website: [www.wphf.org](http://www.wphf.org).*

# Lincoln Square Neighborhood Center Organizes to Protect Funding for Local Older Adults

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meals or skipped meals because there wasn't enough money for food. Says Stephanie Pinder, Executive Director, Lincoln Square Neighborhood Center, "What we have in our community is a number of people who might not get enough to eat. And we're guessing that if they cut meals, they're skimping in other areas, too, possibly purchasing medications or other essential items."

The survey also found that almost half of older people in the Lincoln Square NORC neighborhood (48%) had not socialized with friends or neighbors in the week prior to being surveyed. Cautions Pinder, "We knew this was an issue and had been working on reaching out to seniors prior to the AdvantAge survey. We're getting more people to come to our social events, classes and meal programs. If we lose funding, though, we'll have to cut back on our outreach and our programming."

The good news? More than three of five (63%) of people age 65+ attended church, temple or other religious activity in the past week. "That's why we're starting with the clergy," notes Pinder. "We're going with one of our strengths. We know that a lot of people go to church and listen to their clergy. The clergy can help us spread the word and connect older people with the services they need."

Government representatives including Mayor Bloomberg and LSNC seniors will receive additional data presentations

during the LSNC "information tour" planned later in the Spring.

"This is an important fight," says Pinder. "Many of our older adults have lived and worked and paid taxes in this city and this state for decades. Our services are helping to create a more elder-friendly community, where they can continue to live with the dignity and independence they deserve. We need to protect our funding. And the *AdvantAge Initiative* survey data help us tell a story about what's happening to older people living in our NORC, and what would happen without us to help them."

As members of the NORC Advisory Council, which has been meeting monthly during the campaign, have noted, this is also likely to be a long fight. Even in good times, State budget wrangling often extends well into the summer, months after the City's budget must be approved on June 30.

"Until the true outlines of the City and State budgets are known," says Pinder, "our strategy is to create a regular drumbeat of activity, of news and to keep building relationships with folks in government, relationships that will benefit us in the long-term, as well. We want to make sure our elected officials know that we're here, that we are a force to be reckoned with."

## 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.

The  
**ADVANTAGE**<sup>SM</sup>  
Initiative

*Improving Communities for an Aging Society*

## AdvantAge Initiative Funders

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Center for Home Care Policy and Research  
Visiting Nurse Service of New York  
107 East 70th Street  
New York, NY 10021  
212.794.6300  
[www.advantageinitiative.org](http://www.advantageinitiative.org)