

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?

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By the time you receive this newsletter, the *AdvantAge Initiative* surveys will have been completed in all of our communities, and the data from the completed surveys will have been readied for analysis by Westat. During the months ahead, survey responses will be analyzed in detail and distributed to communities using several different formats.

To set the stage, this month's centerfold presents some demographic information about the *AdvantAge Initiative* communities. Not surprisingly, older women seem to outnumber older men everywhere, including the *AdvantAge Initiative* communities.

Also in this issue, we shine the spotlight on Indianapolis, Indiana, and its impressive leadership team. An interview with Duane Etienne, Indy's *AdvantAge Initiative* liaison, focuses on the development of the leadership team, which has been very busy over the past months visioning an elder-friendly Indianapolis and developing a planning document. Phil Stafford of the Evergreen Institute discusses the challenges of organizing a dynamic leadership group and keeping them engaged, focused, and productive for the duration of the project.

The *AdvantAge Initiative* was represented at the recent ASA/NCOA conference in Denver, CO, through an "Issue Forum" called "Assessing Community Readiness for an Aging Population." Phil Stafford moderated the session, Mia Oberlink provided background information on the *AdvantAge Initiative*, Elisabeth Simantov presented some very preliminary results from surveys in Jacksonville and Puyallup, and Amy Ernharth (Jacksonville) and David Hanson (Puyallup) discussed some of their respective "on the ground" activities related to the Initiative.

Attendees at the session, who came from all over the country, expressed a great deal of interest in

the Initiative. They lamented the fact that they have little or no data on older people living in their communities and barraged us with questions: What resources would be needed to initiate a project like ours in their communities? How could they convene a task force and who should be on it? What other types of research should be done to supplement survey data?

It was clear from their inquiries that there is a hunger for information out there and that many other communities would be eager to join the Initiative if they had the chance!

Mia and Esther

Stories from the field:

Over the last several months, many community liaisons have received feedback from seniors who have been interviewed for the *AdvantAge Initiative* survey. Some seniors called to learn more about the project, some to report on their interactions with interviewers, some to request information about services in their communities, and others simply to talk.

Here are a few examples of the stories we have heard "from the field."

A senior called the staff person at the Yonkers Elder Friendly Initiative (YEFI) after completing the survey because some of the survey questions had inquired about his employment status. He said that he was not working but wanted a job, then asked whether YEFI had employment opportunities or could assist him in finding work. Luckily, the YEFI staff person was able to link him up with a local senior employment project that helps seniors find jobs. We hope he was successful.

continued on page 7

Making the Most of Your Leadership Team or Task Force

The Indianapolis *AdvantAge Initiative* project is headed by CICOA the Access Network. CICOA serves an eight county area in central Indiana, but the Indianapolis *AdvantAge Initiative* focuses on the urban area of Indianapolis, within the city limits.

Duane Etienne, CICOA's President and CEO, and Bob Adsit, Director of Planning, have assembled and work closely with a dynamic and diverse leadership team (see right for a sampling of the types of individuals on the team). The team's two chairs, Helene Cross, President and CEO of Fairbanks Hospital, and Father Boniface Hardin*, President of Martin University in Indianapolis, have logged years of work in the trenches and around board tables, and their respective skills are well matched to provide effective co-leadership.

Early on, the group's steering committee (consisting of Duane, Bob, Helene, and Father Hardin) contracted with Camilla Brown, a consultant who had worked with CICOA on another strategic planning contract. Leadership group meetings are chaired by Helene Cross and Father Hardin. Each meeting's agenda includes group work facilitated by Camilla Brown, and the continuity of this practice has been instrumental in developing a sense of collaboration, accomplishment, and commitment.

Over the past few months, the leadership team engaged in visioning and strategic planning with Camilla's help. The team was divided into four groups according to the four *AdvantAge Initiative* domains. Each group was charged with developing a vision for its domain (e.g. "A Vision of Meeting Basic Needs," "A Vision of Independence," etc.), specifying measures of success (e.g. "We know we have achieved this vision when..."), and proposing action steps to achieve the specified goals. Each of the four groups met and shared their experiences, discussed how well they think Indianapolis is doing with respect to each domain, and brainstormed future goals and how to attain them. Each group then reported results to the whole leadership team.

The ongoing visioning process together with the work of the four groups were compiled into a document called "Advocacy for the Community and the Elderly: A Vision of our Future." The leadership team's philosophy is summed up in a short sentence found on the cover of the document, "What's Good for the Elderly is Good for the Community." This document is now in draft form, and the *AdvantAge Initiative* survey results will be incorporated into the final report when they become available. The document will then be shared with the rest of the community to increase awareness and spur action.

In the interview on the facing page, Duane Etienne shares his perspectives about building an effective leadership team, and on pages 6 and 7 Phil Stafford provides additional insights on the essential elements of collaborative leadership, with an interesting (and challenging) exercise to try out with your leadership team or task force next time you meet.

Indy's Dynamic and Diverse Task Force

The Indianapolis Leadership Group is diverse, including a variety of age groups (30's through 80's), an equal distribution of males and females, and varied racial representation. Here is a sampling of the professions represented on the task force:

- General counsel for Area Agency on Aging
- Executive director, government planning council for people with disabilities
- Geriatric physician
- Professor, school of social work
- President and CEO of drug treatment hospital
- Vice president of local foundation
- Executive director of local AARP chapter
- Benedictine priest/ president of local university
- Deputy mayor
- Manager of design for business furniture company
- Board member, Area Agency on Aging
- Vice president of Goodwill Industries
- Dean of school of occupational therapy
- Methodist minister
- Director of economic development, local utility company
- Retired dean, school of social work
- CEO of visiting nurse organization
- Executive director, association for home care and hospice
- Local chamber of commerce official

...and many local seniors are task force members as well.

*At the time of this printing, Father Boniface Hardin has resigned his position as co-chair for personal reasons. He remains involved and committed to the Indianapolis Leadership Group and to the *AdvantAge Initiative*.

FOCUS ON INDIANAPOLIS:



A Conversation with Duane Etienne

Note: The Indianapolis AdvantAge Initiative project is headed by CICOA The Access Network, central Indiana's area agency on aging. We interviewed CICOA's President and CEO, Duane Etienne, about the formation of their leadership group (task force) and how they have shaped their work over the past year.

AI: You have had success in building a task force that is diverse and also includes movers and shakers, people who have the ability to make things happen. What was your process in gathering this group together?

DE: I left the team meeting in New York last year with a good idea of what to do, who should be on the task force, and how to invite them. CICOA should have a leading role, but I knew a successful task force should also include leadership from city government, from organizations serving seniors, disabled populations (regardless of age), organizations like the United Way that serve broadly with no age focus, funders, educational institutions, geriatrics, older people themselves, workforce development organizations, neighborhood development organizations, the business community, advocacy organizations, public and other healthcare organizations, and CICOA's Board of Directors and Advisory Council.

AI: How successful were you with your invitations to participate?

DE: Actually, no one turned me down – a wonderful, affirming experience! But some organizations have sent a series of different staff members to our meetings. The Chamber of Commerce indicated they were over-committed and would support the initiative but could not send a regular participant.

AI: Does this mean the Chamber did not see this as a high priority?

DE: Yes, I think that's accurate. One of our challenges is to help the business community realize that seniors represent a potent economic force, not just as spenders but also as workers with valuable experience. Individual business people are aware of this. We hope to build that awareness in the organized business community as well.

AI: You have been at CICOA for 22 years. Do you attribute your success in recruiting members of the leadership team to your extensive experience in the community?

DE: Yes, it was helpful in getting them in the door. I don't believe, though, that developing this team solely around a personality would be a good thing. I was confident that the first step – getting them in the door – was all that was needed. The issue and the opportunity would carry it forward.

We were lucky in getting good co-leadership for the task force – two people with complementary experience and skills – and a lot

of work has been done, with the help of our facilitator. This group has the wherewithal to make something happen.

AI: How do you see the group making 'something' happen? I noticed that your action plan speaks in terms of "advocacy," not necessarily "program development."

DE: The action plan identifies this work as part of a 'movement' and the role of the task force as one of advocacy. In many cases the actual executors of programs will be somebody other than ourselves, because the area we serve is too large for it to be any other way. For a smaller community, the approach could be very different.

AI: Can you explain what you mean by a 'movement'?

DE: Actually, I feel that I have been participating in a movement for 22 years!

As a group, we continue to discuss this. I think the best way to understand it is to look at the history of, say, the civil rights movement. Looking back, it is clear there were many early, behind-the-scenes events and individuals that together participated in bringing the issue to public awareness. This was a building period. We see ourselves as being in this stage. A movement must sweep across a community and change the way it believes and behaves. We believe we are in the process of becoming a movement now. We are laying the groundwork.

AI: This means you have a long-term perspective...

DE: Yes, for it to work, we can't end this in December 2002, with a nice report that will sit on the shelf. We have tremendous excitement to be part of a national project that will initiate a national movement.

AI: So what's next?

DE: Well, it has been an interesting experience. One of our task force co-chairs believes strongly in the value of building the team. I feared a loss of interest on the part of the action-oriented members of the group if we spent a lot of time on a sensate level. It has been frustrating at times, and things didn't happen fast, but we now have a good action plan for taking the results of the survey and our other research and deliberations to the community in a targeted way to get things done. There is tremendous excitement among the task force members.

AI: What will the work be?

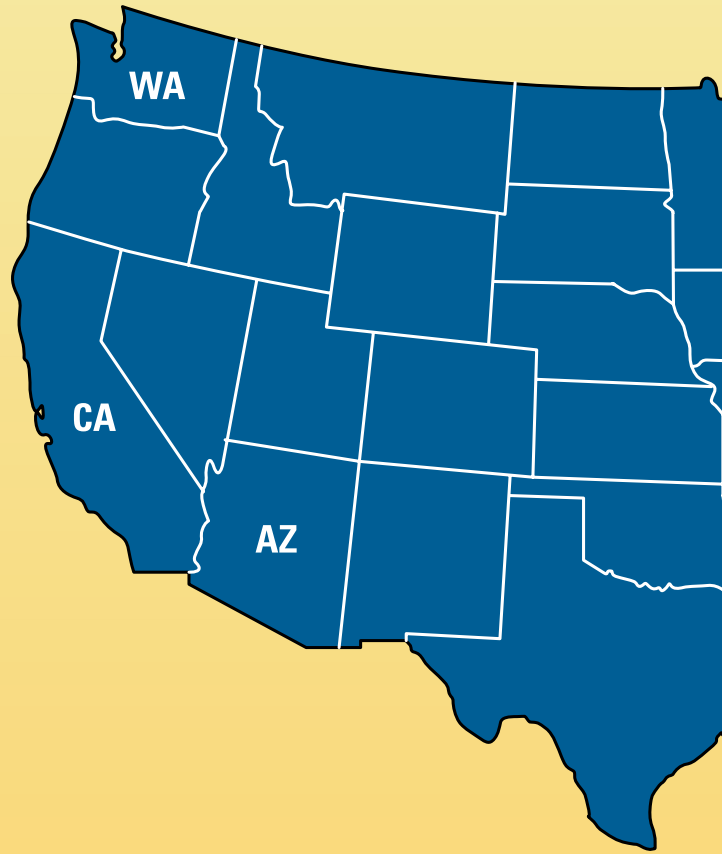
DE: Recommended actions will come from the action plan, which is now in draft form, and the survey results. By the end of August, we expect to publish our action plan and have someone in place to be responsible. A local development is the formation of a Consortium for Creative Aging and Retirement, which is devoted to addressing seniors' need for engagement and connection to their community. We anticipate working with the Consortium to implement parts of our action plan. We are now taking steps to involve the CICOA board more deeply and enlist their participation. The task force members themselves are in a position to make things happen. I am eager to see the data on our community and work with this group on the next phase.

AI Communities Are

Population in the *AdvantAge Initiative* Communities

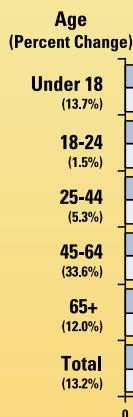
Community	Adults Aged 65 & Older
Chicago, IL	25,904
Indianapolis, IN	89,535
Jacksonville, FL	119,678
Lincoln Square, NY	589
Maricopa County, AZ	351,422
Orange County, FL	85,829
Puyallup, WA	10,166
Santa Clarita, CA	12,043
Upper West Side, NY	13,624
Yonkers, NY	24,437

- This table displays the *non-institutional* population of adults aged 65 and older in the *AdvantAge Initiative* (AI) communities based on Census 2000 data.
- The geographic perimeters of these communities were defined by the AI community representatives using zip codes, parts of zip codes, or counties as boundaries.
- The samples for the AI survey were drawn from the populations living within these defined boundaries.

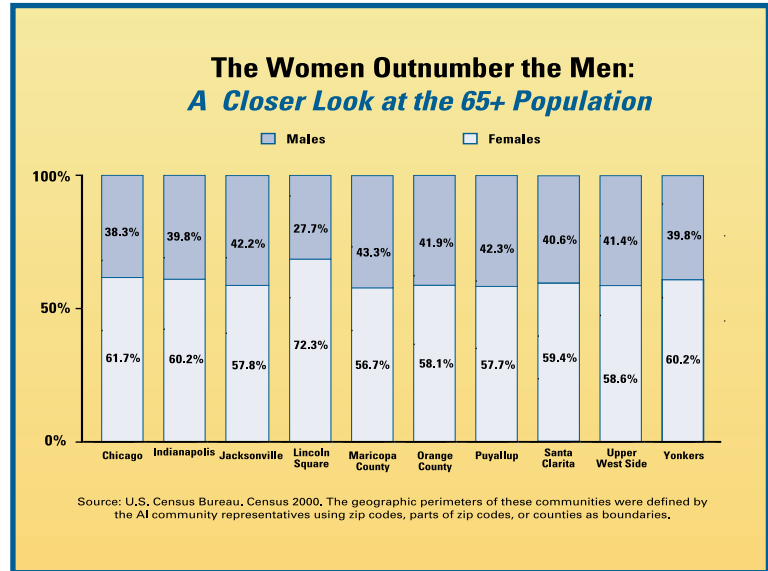
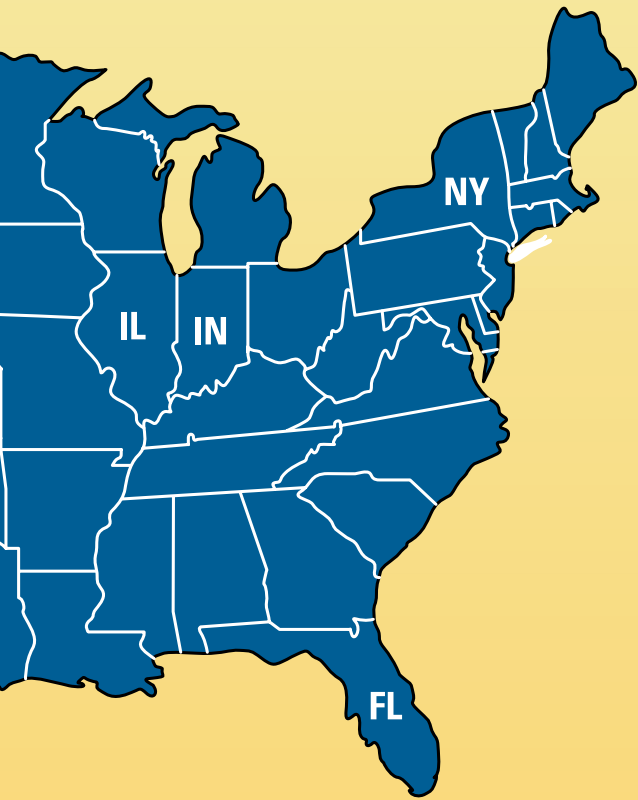


Population Change 1990 to 2000, by Age – United States

- This chart shows the U.S. population in 1990 and 2000 broken down by age groups. It also shows the percent change between Census 1990 and Census 2000.
- Overall, the U.S. population increased by 13.2%.
- The population of adults aged 65 and over increased by 12%.
- Baby boomers, adults aged 45 to 64, are the group that grew the most-33.6%. Take note: this group is the next wave of older adults!

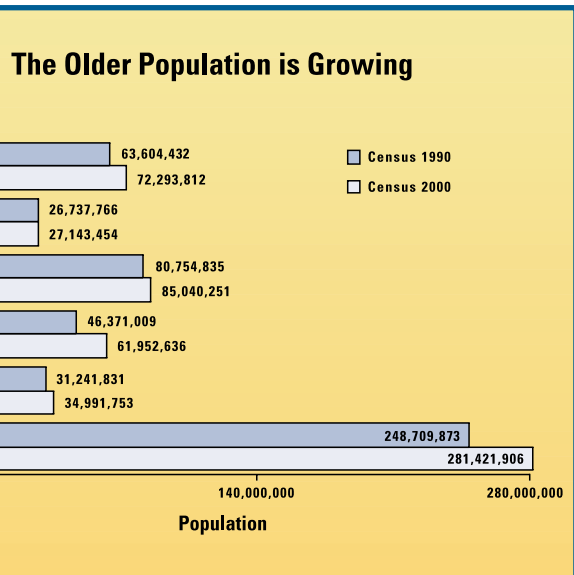


e All Over The Map



Population Age 65+ in Advantage Initiative Communities by Gender

- Each bar presents men and women as a proportion of the population who are 65 and older in each community.
- The data indicate that in all AI communities, women make up a larger proportion of the population of people 65 and older than men in this age group.



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Your Task Force

Collaborative Leadership for Positive Community Change

By Phil Stafford

Through our site visits, we have had the wonderful opportunity to observe and reflect upon the work that the AdvantAge communities have conducted over the past year. While we have not begun a second round of interviewing in each community, we have already learned much from project field notes (keep them coming!!!) and conversations electronic and otherwise with project liaisons. In addition, with funding from the Robert Wood Johnson Foundation, we have been conducting "best practice" research on aging programs in other communities not affiliated with the *AdvantAge Initiative*. We have conducted, transcribed, and begun to analyze literally hundreds of hours of interview material!

While extracting "lessons learned" from all this material is a work in progress, I would like to offer some general observations on the relationship between effective *collaborative leadership* and *successful community change*. I have to admit that these observations are also informed by 25 years of successes and failures here in Bloomington, Indiana, the home of the Evergreen Project.

While we can't assert which factors are necessary and which are sufficient, it appears that successful community change depends in part on the following elements (which are further defined below):

- The project is initiated by leaders with *situated knowledge* of the environment for change
- The right people in the right relationships are at the heart of change
- Leaders link this *situated knowledge* and these relationships through *effective framing* or marketing of issues
- These relationships are sustained through effective communication and the creation of *learning communities*
- Community needs are met by correctly matching solutions to problems and resources to needs

In the June workshop and later publications, we'll elaborate on these conditions for success. Yet, some definitions are in order...

Collaborative leadership means leading through *relationship building* and *sharing of knowledge*, rather than wielding power in the traditional sense.

Situated knowledge means that the leader isn't defined by some particular personality trait, but rather by *practical knowledge* of the community. The collaborative leader knows who the

stakeholders are (large and small) and will employ whatever networks work to include people. Beliefs and motivations among stakeholders are sometimes in conflict. Yet, the collaborative leader can see or help find the common ground and overlapping interests around which diverse people can rally. He or she knows that people operate under certain practical constraints on time and effort and, hence, devises ways to make it easy for everyone to be involved.

Simply knowing whom to involve, however, doesn't get them into the room. Collaborative leaders have the chutzpah to ASK for help, and to frame issues and tasks in such a way as to enable people to feel they are making a difference by getting involved personally (and not as assigned representatives of some other group).

Several *AdvantAge Initiative* leaders have commented that getting people to the table is not nearly as difficult as keeping them there! *Sustaining relationships* is certainly a challenge. It means supporting collaboration among potential "competitors," mediating competing interests among those involved, and dealing with the turnover of personnel due to the influence of outside forces. We have seen projects overcome such tough challenges when the leadership:

- Makes the Task Force or project fun and social
- Actively promotes a culture of inclusiveness
- Maintains the *learning community* by emphasizing the fact that the group will learn more together than they could as individuals
- Uses conflict as grounds for learning and experimentation
- Invests heavily in communication within and without the project

Finally, savvy leaders know how to *match solutions to problems and resources to needs*. For example, an effective leader might suggest that the best solution for "turf wars" among non-profits is not to create formal agreements between them but rather to build informal interpersonal relationships across agencies. Similarly, effective leaders can identify and tap a variety of resources when needed. "In-kind" assistance from local businesses may, for example, be a more appropriate response to a particular community need than just money.

Since the *AdvantAge Initiative* projects are only now approaching the strategic planning and solutions stage of their work, let's save some discussion of all this for future issues. In the meantime, it's a good time to sit back and ask what these generalizations mean for the local projects. See the sidebar for some practical, concrete questions you can use to assess "how you're doin'" with some of these general points.

Reflection Exercise

As one of the local leaders for the Task Force, you can consider how members of the Task Force might answer the following questions. Even better... give the checklist to every Task Force member to complete (anonymously if desired) and let responses serve as the basis of a group discussion entitled "Our Task Force... How Are We Doin'?"

- Do I have a clear sense of the mission of this Task Force?
- Is attendance and participation sufficient to keep our momentum going?
- Do I receive communications in a timely and sufficiently frequent and complete manner?
- Do I have a sense as to how important this work is?
- Are member and leadership roles clear on this Task Force?
- Do I feel that I can personally influence the direction of this Task Force?
- Do I have a greater understanding of the issues and realities of aging in our community?
- Do I have a sense of movement; a sense the Task Force is making progress?
- Are the chains of action logically connected so that I know what will happen next?
- Are all members encouraged to get actively involved in the discussions?
- Are members open with one another and distinguishing between shared and individual agendas?
- Is competition among people deterring our progress?

Conducting this exercise and having a frank discussion of the results might prove to be a productive way of assessing your progress, identifying barriers, and celebrating those characteristics that are moving you along.

Stories from the field: *(continued from page 1)*

A woman from the Upper West Side called to say that the questions on the survey helped her to reflect on her life. She had just come home from her regular run through a nearby park when the phone rang. After she completed the survey, she called to thank us for helping her to take a "blessing inventory." She was an avid runner, very healthy, retired, and living on a nice pension and retirement savings. Her children lived nearby and she saw them often. She also volunteered locally with her friends. She hadn't thought about the richness of her life in a while, and simply wanted to say "thank you."

A senior in Orange County, Florida was looking forward to completing the survey interview after reading about the project in a letter that arrived in her mailbox a few weeks back. She was delighted to receive the phone call, but first she had a few questions of her own. Her community had done a great job of alerting residents, especially seniors, about the prospect of phone calls from "scam artists." Not wanting to fall victim to a possible scam, she decided to interview the interviewer first. What was the project about? What did the letter say? On whose letterhead was it written? And finally, who signed the letter? The interviewer had the letter in question in front of her (as a WESTAT employee she was fully prepared), and passed the test with flying colors. Only then would the senior proceed with the survey, and she was happy to do so.

A gentleman in his early 100's was contacted to complete the survey. The survey interview process was explained to him, as was the approximate time it would take to complete it. He thought for a minute, weighing his options, and decided that he would decline to be interviewed. In the end his decision was a simple one for him. "A half hour...", he said. "I'm over 100 years old. I don't know if I have a half hour to spare, and I'm certainly not going to spend it on the phone completing a survey." His prerogative, indeed!

Introducing the AdvantAge Initiative Communities

Maricopa County, Arizona (Phoenix Area):

AdvantAge Initiative Lead Organization: The Virginia G. Piper Charitable Trust

AI Liaisons:

Carol Kratz: (480) 556-7123; ckratz@pipertrust.org

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Warmth, beauty and carefree lifestyles are just a few reasons why Maricopa County, Arizona is one of the most popular retirement communities in the country. While more than 325,000 people over the age of 65 live in Maricopa County, many of them are far from sitting in the proverbial rocking chair on the front porch.

Over the past few decades, the nature of the “retiree” has dramatically changed. Today, countless people in their 60s and 70s are more apt to take up yoga, go back to school or start a business than quietly wind down. While this is good news, organizations that provide services to the “elderly” have traditionally focused on those most fragile and vulnerable in need of services to help them remain independent.

The numbers of retirees in Maricopa County are exploding along with the shift in their profile: By 2010 this segment of the community will have increased by 31%.

Given the differences in interests of today’s retirees and the projected increase in the over 65 population, agencies in

Maricopa County are working together to assess how to plan for the changing profile of a segment of the population ranging from the newly retired to the growing segment of “old old” citizens over the age of 85. How do we make our region “elder-friendly?”

The Virginia G. Piper Charitable Trust will partner with the Area Agency on Aging and the Maricopa Association of Governments to share and utilize information from the *AdvantAge Initiative*. The last survey focusing on the aging community in Greater Phoenix was completed over ten years ago.

The Trust will use the data as one tool in its grantmaking for elderly services. The Area Agency on Aging will incorporate the information to evaluate and consider essential services for contracts. The Maricopa Association of Governments, responsible for recommending services to be funded with a portion of the federal Social Services Block Grant and for transportation planning, will share the data with local governments. Other local foundations interested in issues of aging will draw on the survey results for their own grantmaking.

The State of Arizona, the AARP, the Governor’s Commission on Aging, and nonprofit organizations serving those over age 65 will also benefit from the *AdvantAge Initiative* survey. The survey will create new benchmarks for agencies to better prepare for the increased population and the changing characteristics of Maricopa County’s senior population.

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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AdvantAge Initiative Funders

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