

Vermont's Planning for Population Aging: Recent State Efforts & Recommendation for a Master Plan

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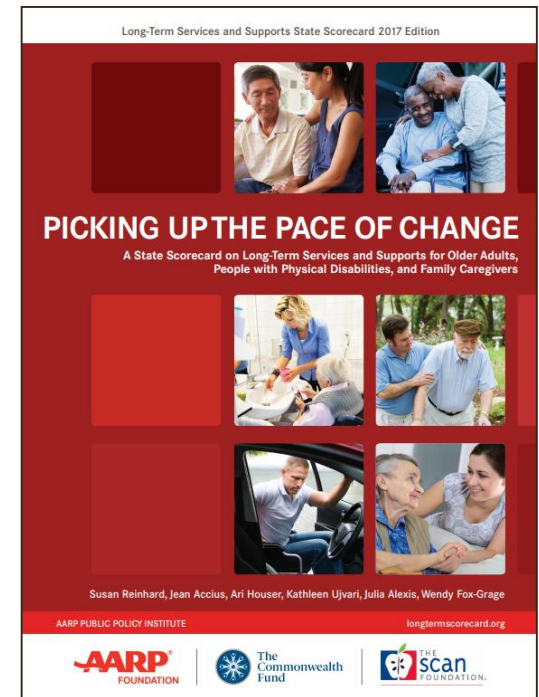
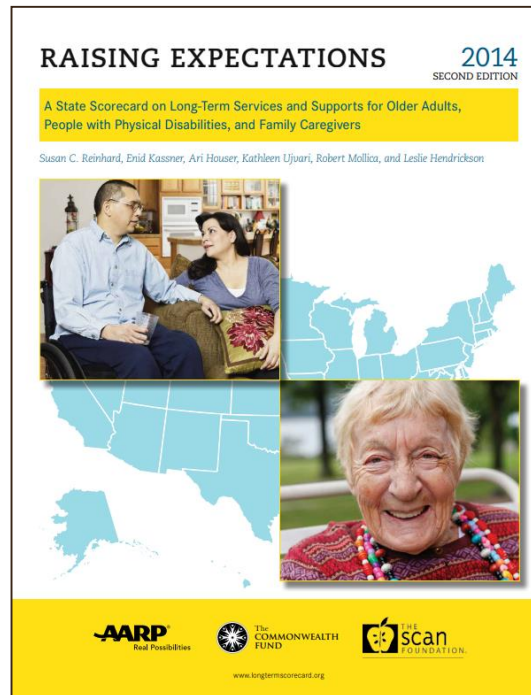
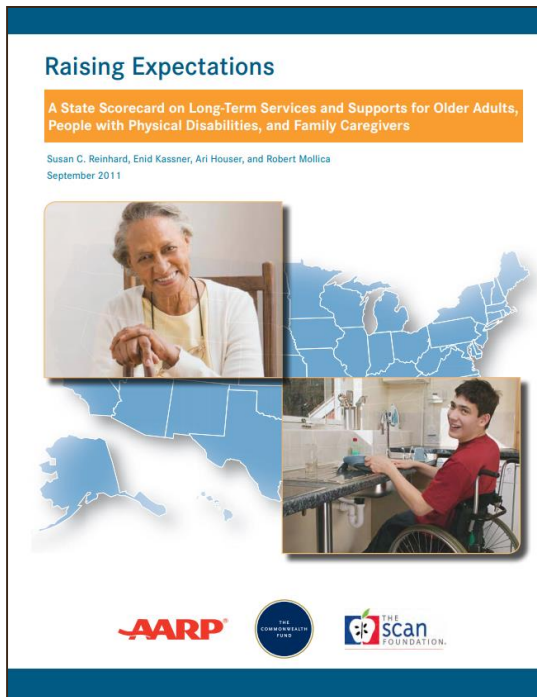
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Three Main Points on Master Plan for Aging

1. Leading states with best overall aging/LTSS systems have a Master Plan
2. Vermont has many pieces to build its own Master Plan
3. Vermont is already a pacesetter, & can continue to lead the way!



LTSS Scorecard



www.LongTermScorecard.org

Why a Master Plan for Aging?

- Brings visibility to population aging priorities
- Interconnects goals & outcome measures of various strategy & reporting documents
- Provides roadmap to legislature, administration, & staff to guide future planning, budgeting, & oversight
- Calls for public, private, & philanthropic leaders to collectively engage in aging priorities

Five Elements of Master Plan Success

HERE ARE 5 ELEMENTS FOR PLAN SUCCESS



DECISIVE LEADERSHIP

Governor and legislators are invested



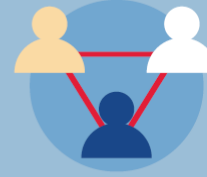
RATIONAL

Priorities are ranked and data-driven



COMPREHENSIVE

Financing, services, workforce, caregiver support, housing, and transportation included



STAKEHOLDER INVOLVEMENT

Consumers, providers, and policymakers work together



ACCOUNTABILITY

Reporting timelines are clear, with measurable outcomes

Call for Change: California's Master Plan for Aging



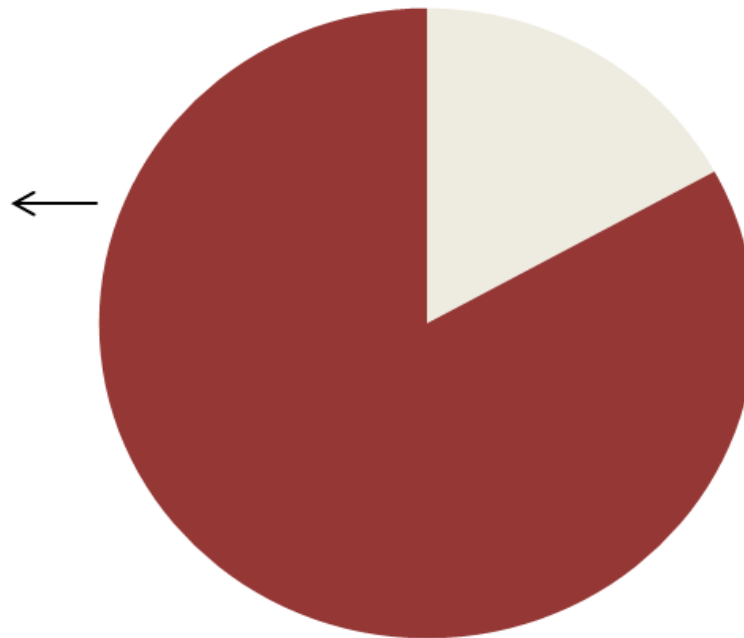
2018 Voter Voices: California Needs a Plan



We Stand With Seniors
Will You?

Voters Want A Plan

83% say we
need a vision
& plan



www.WeStandWithSeniors.Org

2019 California Master Plan Legislation

	Author	Description
SB 228	Sen. Jackson	Parameters of the Master Plan for Aging
SB 611	Sen. Caballero	Affordable, accessible housing for older adults, as part of the Master Plan for Aging
AB 1136	Asm. Nazarian	State level reorganization to create the California Department of Community Living, as part of the Master Plan for Aging
AB 1287	Asm. Nazarian	Statewide implementation of No Wrong Door & Universal Assessment, as part of the Master Plan for Aging
AB 1382	Asm. Aguiar-Curry	Workforce issues & family caregiver support, as part of the Master Plan for Aging

Gov. Newsom: A Verbal Commitment & Executive Order

EXECUTIVE DEPARTMENT
STATE OF CALIFORNIA

Executive Order N-14-19

WHEREAS, the State of California values older Californians and is committed to building an age-friendly state so that all Californians can age with dignity and independence; and

“We need to get ready for this major demographic challenge headed our way. It’s time for a new Master Plan on Aging in California.”

***State of the State address on
February 12, 2019***



CA's Master Plan for Aging Development



- **Cabinet-Level Workgroup** www.EngAGECA.org
- **Stakeholder Advisory Committee**
 - Long-Term Services & Supports Subcommittee
 - Research Subcommittee

Vermont's Planning for Population Aging

Consultation Overview

The Ask: President *Pro Tem* Tim Ashe requested a review of Vermont's State Plan on Aging for elements of a Master Plan, including strengths, weaknesses, & opportunities

Process: Analyzed State Plan on Aging, as well as multiple state reports & legislation

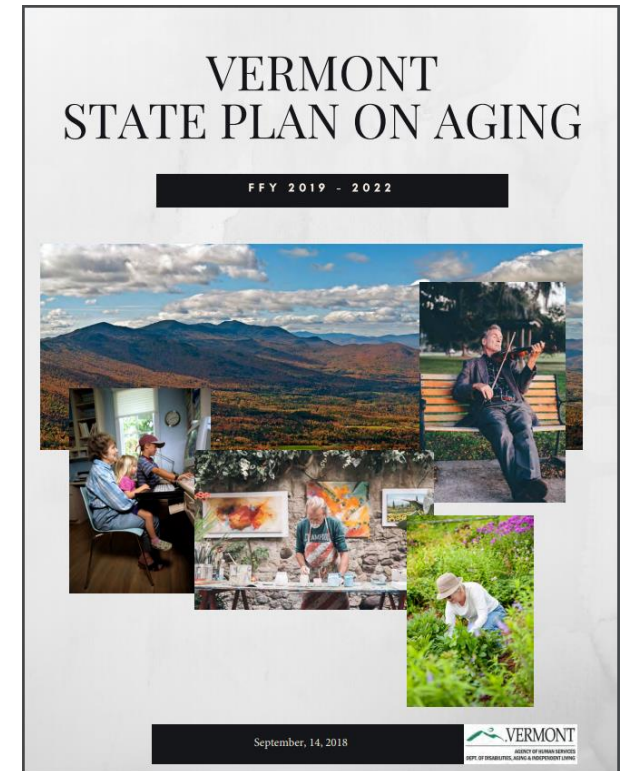
Findings: Vermont has developed multiple strategy & framing documents with key ingredients that could be woven into a Master Plan for Aging

Resources We Reviewed

State Plan on Aging, 2019-2022	https://asd.vermont.gov/sites/asd/files/documents/VT%20State%20Plan%20on%20Aging_2018_FINAL%20APPROVED.pdf
Department of Disabilities, Aging, & Independent Living (DAIL) Scorecard	https://embed.resultsscorecard.com/Scorecard/Embed/27950
DAIL Mission Statement and Core Principles	https://dail.vermont.gov/sites/dail/files//documents/DAIL_Mission_Statement_and_Core_Principles.pdf
Act 186: Outcomes Bill (2014)	http://www.leg.state.vt.us/DOCS/2014/ACTS/ACT186.PDF
State of Vermont Outcomes Report	https://embed.resultsscorecard.com/Scorecard/Embed/17845
Act 172 (2018)	https://legislature.vermont.gov/Documents/2018/Docs/ACTS/ACT172/ACT172%20Act%20Summary.pdf
Older Vermonters Act Working Group Report	https://dail.vermont.gov/act172-older-vermonters-act-working-group-legislative-report
H.611 Older Vermonters Act (2020)	https://legislature.vermont.gov/bill/status/2020/H.611
State Strategic Plan 2018-2023 (FY2019-FY2023)	https://strategicplan.vermont.gov/sites/strategicplan/files/documents/Theme-plans/Strategic%20Plans%20All%20Agencies%20by%20Theme%20v1.3new_wCover.pdf

Vermont State Plan on Aging

- Measurable framework for Older Americans Act funded programs
- Required by the federal Administration for Community Living
- Draws on person-oriented principles
- Data-driven
- Identifies other state planning efforts



Department of Disabilities, Aging, & Independent Living (DAIL) Scorecard

DAIL Scorecard

Summary of DAIL outcomes and indicators, with division programs and performance measures.



Outcomes we want for Vermonters

	Time Period	Current Actual Value	Current Target Value	Current Trend	Baseline % Change
O Act 186 Vermonters are healthy					
I VDH Percentage of Vermonters age 65+ who reported they did not participate in any leisure time physical activity during the previous month	2017	28	21	↓ 1	-3% ↓
I VDH Percentage of Vermonters age 65+ who reported being obese	2016	26	28	↓ 1	13% ↑
I Older Adults Estimated percentage of Vermont residents age 60+ who face the threat of hunger	2015	12.28	14.71	↓ 1	6% ↑
O Act 186 Vermonters with disabilities live with dignity and independence					
I Act 186 Estimated employment rate of Vermonters age 21-64 with all disabilities	2017	45.9%	37.3%	↑ 4	-6% ↓
O Act 186 Vermont's seniors live with dignity and in settings they prefer					
I Act 186 Percentage of Vermonters age 65 and older participating in the labor force	2017	23.8%	17.9%	↑ 2	28% ↑
I Act 186 Hospice enrollment: Percentage of chronically ill Medicare decedents age 65 and older who were enrolled in hospice during the last 6 months of life	2015	41.4%	54.4%	↑ 5	76% ↑
I Act 186 State Ranking on Long-Term Services and Supports for Older Adults, People with Physical Disabilities, and Family Caregivers (AARP, Scan Foundation, Commonwealth Fund)	2017	3	1	↓ 2	-85% ↓

Source: <https://embed.resultsscorecard.com/Scorecard/Embed/27950>

Department of Disabilities, Aging, & Independent Living (DAIL) Scorecard

- Created through Act 186
- Person-oriented outcomes & program measures
- Primarily focused on health & LTSS
- Combines State Plan on Aging outcomes & other department priorities in single reporting format
- Accountability through annual reporting requirements
- Level of stakeholder engagement unclear

DAIL Mission Statement & Core Principles

- Person-oriented
- Included in State Plan on Aging
- Difficult to find on the DAIL website

DAIL Mission Statement and Core Principles

The Department of Disabilities, Aging and Independent Living's mission is to make Vermont the best state in which to grow old or to live with a disability – with dignity, respect, and independence.

DAIL is committed to fostering the development of a comprehensive and coordinated approach to the provision of community-based systems of services for older adults and people with disabilities. Our goal is to enhance the ability of these Vermonters to live as independently as possible, actively participating in and contributing to their communities. As we approach this work, we are guided by the following core principles:

- **Person-centered:** the individual is at the core of all plans and services.
- **Respect:** individuals, families, providers and staff are treated with respect.
- **Independence:** the individual's personal and economic independence are promoted.
- **Choice:** individuals will have options for services and supports.
- **Self-determination:** individuals direct their own lives.
- **Living well:** the individual's services and supports promote health and well-being.
- **Contributing to the community:** individuals are able to work, volunteer and participate in local communities.
- **Flexibility:** individual needs guide our actions.
- **Effective and efficient:** individuals' needs are met in a timely and cost-effective way.
- **Collaboration:** individuals benefit from our partnership with families, communities, providers, and other federal, state and local organizations.

Act 186: Outcomes Bill

- Enacted in 2014
- Identifies population-level outcomes for Vermont's quality of life outcomes
- Requires a annual report to the General Assembly on the State's progress
- One outcome specifically addresses older adults:
"Vermont's elders, people with disabilities & people with mental conditions live with dignity & independence in settings they prefer."

State of Vermont Outcomes Report

- Created through Act 186
- Broader state report that incorporates DAIL Scorecard
- Person-oriented outcome & program measures
- Two of 10 outcomes include aging-specific measures
- Accountability through annual reporting requirements
- Stakeholder engagement is unclear

Act 172

- Enacted in 2018
- Created a working group to develop recommendations for an Older Vermonters Act to align state level work with the federal Older Americans Act
- Recommendations due to legislative committees by December 1, 2019
- Framework includes financial security; health & wellness; social connection & engagement; transportation, housing, community, & family caregiver goals/principles

Older Vermonters Act Working Group

- Established through Act 172 in 2018
- Broad stakeholder representation, including older adults & family caregivers
- Charged with developing recommendations for an Older Vermonters Act that aligns with Older Americans Act & State Plan on Aging
- November 2019 Recommendations: person-oriented, data driven, & represents intersection of basic human needs (e.g., health, finances, employment, community)

H.611 Older Vermonters Act

- Introduced in January 2020
- Includes framework principles from the Older Vermonters Working Group Recommendations
- Outlines DAIL's & Area Agency on Aging responsibilities for serving older adults
- Outlines additional requirements for State Plan on Aging
- Mostly focused on health & community-based services

State Strategic Plan 2018-2023 (FY2019-FY2023)



STATE STRATEGIC PLAN 2018-2023 (FY2019-FY2023)

VISION: Vermont's economy is growing faster than the costs of living; our state is measurably more affordable each year for families and businesses; and we are meeting our obligation to protect the most vulnerable.

 <p>STRATEGIC OUTCOME</p>	<p>GROW THE ECONOMY</p> <p>We will grow Vermont's economy by expanding existing businesses, recruiting new employers and expanding our labor force (workers age 25 to 64), resulting in increased economic opportunity, more jobs, higher K-12 school enrollment and growth in state revenues.</p> <p>Breakthrough Indicators</p> <ul style="list-style-type: none"> ▶ Size of Workforce: Percent of Population; Statewide and by County ▶ Employee Growth Rate: Total and Size by Employee Count ▶ Wage Growth by Region 	 <p>STRATEGIC OUTCOME</p>	<p>MAKE VERMONT MORE AFFORDABLE</p> <p>We will make Vermont a more affordable place for families and businesses by advancing policies that support both economic expansion and affordability; working to prevent state spending and regulated costs, like electric rates and healthcare spending, from rising faster than wages; and building capacity in state government through innovation, improvement and efficiencies.</p> <p>Breakthrough Indicators</p> <ul style="list-style-type: none"> ▶ Average Percent of House Hold Income Spent on: <ul style="list-style-type: none"> » Healthcare » Housing (including utilities and heating costs) » Taxes and Fees
 <p>STRATEGIC OUTCOME</p>	<p>PROTECTING THE VULNERABLE</p> <p>We will protect the most vulnerable by providing services and benefits aimed at lifting more Vermonters out of poverty, ensuring the greatest degree of participation and independence, protecting children, and improving overall health and wellness of our communities.</p> <p>Breakthrough Indicators</p> <ul style="list-style-type: none"> ▶ Percent of Population Living at or Below 200% FPL ▶ Rate of Homelessness/Housing Stability ▶ Kindergarten Readiness ▶ Percent of Population with Access to Comprehensive Healthcare (includes preventative, primary and mental health, substance use disorder treatment and recovery) 	 <p>STRATEGIC OUTCOME</p>	<p>MODERNIZE AND IMPROVE EFFICIENCY OF GOVERNMENT</p> <p>We will nurture and institutionalize a culture of continuous improvement by integrating the Governor's vision with employee-driven reforms to improve processes and modernize state government's systems, providing more efficient and effective services and improving customer service in all areas of state government.</p> <p>Breakthrough Indicators</p> <ul style="list-style-type: none"> ▶ Employees Trained In Continuous Improvement ▶ Employees Trained In Continuous Improvement by Cabinet and Non-Cabinet Units ▶ Number of On-Line Transactions

Date/Version: 01.03.2018 v1.0 | Page 1

The Strategic Plan evolves with periodic update(s) to remain responsive and relevant. Contact Susan A. Zeller, Chief Performance Officer with any questions.

State Strategic Plan 2018-2023 (FY2019-FY2023)

- Governor's executive order called for a strategic plan with indicators for economic growth, affordability, & protecting vulnerable Vermonters
- Every department is responsible for its outcomes
- Outcomes reported annually, with data on breakthrough indicators visible on website
- Not readily apparent how aging issues are addressed in goals across departments
- No breakthrough indicators directly related to aging

Five Elements of Master Plan Success

HERE ARE 5 ELEMENTS FOR PLAN SUCCESS



DECISIVE LEADERSHIP

Governor and legislators are invested



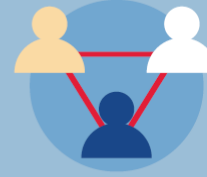
RATIONAL

Priorities are ranked and data-driven



COMPREHENSIVE

Financing, services, workforce, caregiver support, housing, and transportation included



STAKEHOLDER INVOLVEMENT

Consumers, providers, and policymakers work together



ACCOUNTABILITY

Reporting timelines are clear, with measurable outcomes

Element #1: State Leadership

Legislature

- Act 186
- Act 172
- H.611

Governor

- State Strategic Plan
- Person-oriented values

Administration

- DAIL Mission & Principles
- DAIL Scorecard

What's missing?

A call for a comprehensive Master Plan for Aging

Element #2: Priorities Ranked & Data-Driven

- Uses a variety of reliable data sources to develop & track outcomes
- Data sources are transparent & accessible
 - DAIL Scorecard
 - State of Vermont Outcomes Report
 - State Plan on Aging

What's missing?

Visible, cohesive platform where data & priorities are easily accessed by policymakers, state staff, researchers, & public

Element #3: Comprehensive

Multiple priorities in DAIL Scorecard & State Plan on Aging:

- Health
- Employment
- Caregiver support
- LTSS
- Transportation
- Community engagement
- Housing
- Workforce
- Safety

What's missing?

- Lack of connection across state departments beyond DAIL
- Population planning regardless of socio-economic status
- Long-term care financing

Element #4: Stakeholder Involvement

State Plan on Aging

Stakeholder surveys, focus groups, & in-depth interviews

Older Vermonters Act Working Group

Comprised of state staff, legislators, providers, older adults, & family caregivers

What's missing?

Stakeholder engagement on an actionable plan that identifies issues & solutions for population aging

Element #5: Accountability

State Plan on Aging

- Four-year plan
- Measurable outcomes

DAIL Scorecard / State of Vermont Outcomes Report

- Reported annually
- Publicly available
- Measurable goals
- Data sources
- Analysis

What's missing?

A visible, cohesive platform to report outcomes (within & across departments) that uses Vermonter-friendly language

Vermont's Strengths

Leadership: Legislature & Governor focused on population outcomes with some prioritization of aging

Person-oriented values: State leadership is working to prioritize outcomes that focus on people's quality of life, instead of program stability alone

Data-driven priorities & accountability: Outcome dashboards are transparent & provide longitudinal data, sources, & methodologies for replication

Vermont's Opportunities for Improvement

- Visible & cohesive platform for all strategy & framing elements
- Comprehensive planning & accountability across departments
- Further stakeholder engagement to identify issues, solutions, & paths forward

Recommendation

Craft a highly visible, public facing platform that incorporates & communicates vision, goals, strategies, & outcomes to support aging well in Vermont



Minnesota



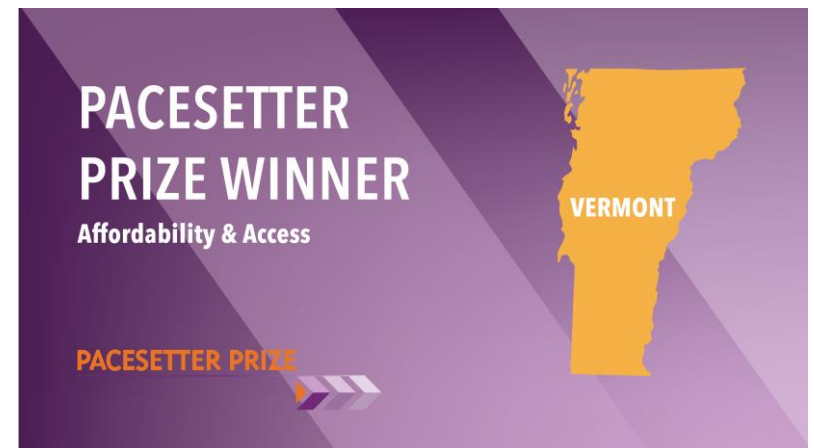
Colorado

How to Get Started

- Legislature / Governor call for a Master Plan for Aging process & platform
- Message plan using Vermonter-friendly language
- Use existing person-oriented principles
- Expand stakeholder engagement
- Make planning for population aging a part of Vermont's culture, infused across all departments
- Include impact on older adults in general population goals (e.g., employment, housing, transportation)

Three Main Points on Master Plan for Aging

1. Leading states with best overall aging/LTSS systems have a Master Plan
2. Vermont has many pieces to build its own Master Plan
3. Vermont is already a pacesetter, & can continue to lead the way!



Our Vision:

A society where older adults can access health and supportive services of their choosing to meet their needs.

Our Mission:

To advance a coordinated and easily navigated system of high-quality services for older adults that preserve dignity and independence.

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