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

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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!
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

83% say we need a vision & plan

Voters Want A Plan

www.WeStandWithSeniors.Org
## 2019 California Master Plan Legislation

<table>
<thead>
<tr>
<th>Bill</th>
<th>Author</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SB 228</td>
<td>Sen. Jackson</td>
<td>Parameters of the Master Plan for Aging</td>
</tr>
<tr>
<td>SB 611</td>
<td>Sen. Caballero</td>
<td>Affordable, accessible housing for older adults, as part of the Master Plan for Aging</td>
</tr>
<tr>
<td>AB 1136</td>
<td>Asm. Nazarian</td>
<td>State level reorganization to create the California Department of Community Living, as part of the Master Plan for Aging</td>
</tr>
<tr>
<td>AB 1287</td>
<td>Asm. Nazarian</td>
<td>Statewide implementation of No Wrong Door &amp; Universal Assessment, as part of the Master Plan for Aging</td>
</tr>
<tr>
<td>AB 1382</td>
<td>Asm. Aguiar-Curry</td>
<td>Workforce issues &amp; family caregiver support, as part of the Master Plan for Aging</td>
</tr>
</tbody>
</table>
Gov. Newsom:
A Verbal Commitment & Executive Order

“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

- 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

<table>
<thead>
<tr>
<th>Resource</th>
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</thead>
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<tr>
<td><strong>Department of Disabilities, Aging, &amp; Independent Living (DAIL) Scorecard</strong></td>
<td><a href="https://embed.resultsscorecard.com/Scorecard/Embed/27950">https://embed.resultsscorecard.com/Scorecard/Embed/27950</a></td>
</tr>
<tr>
<td><strong>State of Vermont Outcomes Report</strong></td>
<td><a href="https://embed.resultsscorecard.com/Scorecard/Embed/17845">https://embed.resultsscorecard.com/Scorecard/Embed/17845</a></td>
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</table>
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
# DAIL Scorecard

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

<table>
<thead>
<tr>
<th>Outcomes we want for Vermonters</th>
<th>Time Period</th>
<th>Current Actual Value</th>
<th>Current Target Value</th>
<th>Current Trend</th>
<th>Baseline % Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>O Act 186 Vermonters are healthy ▪️</td>
<td>2017</td>
<td>28</td>
<td>21</td>
<td>1</td>
<td>-3%</td>
</tr>
<tr>
<td>▪️ Percentage of Vermonters age 65+ who reported they did not participate in any leisure time physical activity during the previous month</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>▪️ Percentage of Vermonters age 65+ who reported being obese</td>
<td>2016</td>
<td>26</td>
<td>28</td>
<td>1</td>
<td>13%</td>
</tr>
<tr>
<td>▪️ Estimated percentage of Vermont residents age 60+ who face the threat of hunger</td>
<td>2015</td>
<td>12.28</td>
<td>14.71</td>
<td>1</td>
<td>6%</td>
</tr>
<tr>
<td>O Act 186 Vermonters with disabilities live with dignity and independence ▪️</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>▪️ Estimated employment rate of Vermonters age 21-64 with all disabilities</td>
<td>2017</td>
<td>45.9%</td>
<td>37.3%</td>
<td>4</td>
<td>-6%</td>
</tr>
<tr>
<td>▪️ Vermont’s seniors live with dignity and in settings they prefer ▪️</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>▪️ Percentage of Vermonters age 65 and older participating in the labor force</td>
<td>2017</td>
<td>23.8%</td>
<td>17.9%</td>
<td>2</td>
<td>28%</td>
</tr>
<tr>
<td>▪️ Hospice enrollment: Percentage of chronically ill Medicare decedents age 65 and older who were enrolled in hospice during the last 6 months of life</td>
<td>2015</td>
<td>41.4%</td>
<td>54.4%</td>
<td>5</td>
<td>76%</td>
</tr>
</tbody>
</table>

Source: [https://embed.resultsscorecard.com/Scorecard/Embed/27950](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
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)

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.

GROW THE ECONOMY
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.

Breakthrough Indicators:
- Size of Workforce: Percent of Population; Statewide and by County
- Employee Growth Rate: Total and Size by Employee Count
- Wage Growth by Region

MAKE VERMONT MORE AFFORDABLE
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.

Breakthrough Indicators:
- Average Percent of House Hold Income Spent on:
  - Healthcare
  - Housing (including utilities and heating costs)
  - Taxes and Fees

PROTECTING THE VULNERABLE
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.

Breakthrough Indicators:
- 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)

MODERNIZE AND IMPROVE EFFICIENCY OF GOVERNMENT
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.

Breakthrough Indicators:
- 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 updates 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**

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<tr>
<td>• Act 186</td>
<td>• State Strategic Plan</td>
<td>• DAIL Mission &amp; Principles</td>
</tr>
<tr>
<td>• Act 172</td>
<td>• Person-oriented values</td>
<td>• DAIL Scorecard</td>
</tr>
<tr>
<td>• H.611</td>
<td></td>
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</table>

**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
- LTSS
- Housing
- Employment
- Transportation
- Workforce
- Caregiver support
- Community engagement
- 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
- Measurable goals
- Publicly available
- 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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