MEMORANDUM

TO: Health and Human Services Committee

FROM: Linda McMillan, Senior Legislative Analyst

SUBJECT: **Commission on Aging 2014 Summer Study, "The Need to Improve Advocacy for Older Adults in Montgomery County Planning"**

At this session, the HHS Committee will be briefed on the Commission on Aging's Summer Study, "The Need to Improve Advocacy for Older Adults in Montgomery County Planning." In addition, the Commission has asked Ms. Gail Kohn, coordinator for Age-Friendly D.C., to provide an overview of the District of Columbia's plan to make improvements in accordance with the World Health Organization's Age-Friendly Cities project.

Expected for this session:
Charles Kauffman, Summer Study Chair, Commission on Aging
Judith Levy, Chair, Commission on Aging
Odile Brunetto, Director, Area Office on Aging, Department of Health and Human Services
Gail Kohn, Age-Friendly DC Coordinator
Gwen Wright, Director, M-NCPPC, Montgomery County Department of Planning

For 2014, the Commission on Aging undertook a summer study to look at whether adequate attention is given to the needs of seniors in the planning process given the growing number of seniors and the County's master and sector plans for White Flint, Westbard, Chevy Chase Lake, and other places with mixed-used urbanized complexes.

A letter from the Commission in preparation for this session is attached at ©A-C. A copy of the study is attached at ©1-39. The study builds on the Senior Agenda, which is included at ©29-31 as a part of the study.

The Commission on Aging held a series of meetings with panelist representing the County Government, Planning Department, the building industry, the Jewish Council for the Aging, Age-Friendly DC, and others to learn about opportunities for input into the planning and development process. The Summer Study includes a summary of these discussions. The Recommendations of the Summer Study are included at ©5. In summary they are:

- The Commission on Aging (COA) should advocate for a "Senior" section in all master plans and sector plans.

- The COA should expand the Senior Agenda to ensure comprehensive coverage of the key features of an Age-Friendly County.

- The COA should recommend a high-level staff position be created on the Planning Board to advocate and promote senior issues.

- The COA should recommend that a representative of the Planning Board be on the Senior Sub-Cabinet, engaging fully with county department heads.

- The COA should provide leadership and strong advocacy for older adults in the planning process by building strategic relationships with the government, for-profit, and non-profit sectors.

- The COA believes that Montgomery County should become a World Health Organization (WHO) Age-Friendly City (County). The COA should advocate for a task group to explore the steps and resources involved to joint the Age-Friendly Citites program.

The letter from the COA says in its progress report that representatives of MNCPPC have been invited to participate in the Senior Sub-Cabinet. It also notes that the COA is going to undertake a review of the Senior Agenda and the WHO Age-Friendly checklist.

World Health Organization Age-Friendly Cities

The WHO in 2006 initiated the Age-Friendly Cities program in response to global trends that show both growth in urban areas and a growth in residents aged 60 and older. The WHO says that "An Age-friendly city is an inclusive and accessible urban environment that promotes active aging," and that "an age-friendly city adapts its structures and services to be accessible to and inclusive of older people with varying needs and capacities." A brochure on Age-Friendly Cities is attached at ©40-41. WHO has developed a Guide for communities, and the checklist from the Guide is included in the COA report at ©34-39. The checklist is derived from 8 domains that WHO has included in their Guide.

The letter from the COA emphasizes the reasons why Montgomery County should participate in the Age-Friendly Cities program (©B).

Portland, Oregon

The City of Portland, Oregon was the only U.S. City in the original World Health Organization's 2017 Global Age-Friendly Cities Guide. The Age-Friendly Cities project in Portland is a City-University-(Portland State University)-Community model. Portland's Action Plan has 10 domains:

1. Housing
2. Transportation
3. Outdoor Spaces and Buildings
4. Respect and Social Inclusion
5. Civic Participation and Volunteering
6. Employment and the Economy
7. Social Participation
8. Communication and Information
9. Community Services
10. Health Services

An excerpt from the introduction of the Action Plan for an Age-Friendly Portland is attached at © 42-51. The excerpt contains some background on the effort and the section discussing the Housing domain.

Washington, D.C.

In 2012, Washington D.C. adopted its New Community Living 2017 Strategic Plan that includes as its first goal, *"The District of Columbia will be an "Age-Friendly City," a community that is an inclusive and accessible urban environment that encourages active and healthy aging."*

The District of Columbia worked with The New York Academy of Medicine in its efforts to analyze data and make recommendations on areas of concern. The District of Columbia has adopted 10 domains for its Age-Friendly D.C. goals and objectives. The full plan includes goals and objectives for each domain.

The Ten Domains

1. Outdoor Spaces and Buildings - accessibility to and availability of safe recreational facilities.

2. Transportation - safe and affordable modes of private and public transportation.

3. Housing - wide range of housing options for older residents, aging in place, and other home modification programs.

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4. Social Participation - access to leisure and cultural activities and opportunities for older residents to participate in social and civic engagement with their peers and younger people.

5. Respect and Social Inclusion - programs to support and promote ethnic and cultural diversity, along with programs to encourage multigenerational interaction and dialogue.

6. Civic Participation and Employment - promotion of paid work and volunteer activities for older residents and opportunities to engage in formulation of policies relevant to their lives.

7. Communication and Information - promotion of and access to the use of technology to keep older residents connected to their community and friends and family, both near and far.

8. Community Support and Health Services - access to homecare services, clinics, and programs to promote wellness and active aging.

9. Emergency Preparedness and Resilience, a DC focus - information, education and training to ensure the safety, wellness, and readiness of seniors in emergency situations. *A DC-added domain.*

10. Elder Abuse, Neglect, and Fraud, a DC focus - prevention and prosecution of financial exploitation, neglect, and physical, sexual, and emotional abuse of seniors. *A DC-added domain.*

An excerpt from the Age-Friendly DC plan on the Housing domain is attached at ©52-54.

January 13, 2015

Montgomery County Council
HHS Committee
101 Monroe Street
Rockville MD

Members of the Committee:

The Commission on Aging (COA) Planning Process Summer Study arose from concerns that despite the increasing number of older adults in the County, they lack adequate visibility and representation in the County's planning process when Master Plans and Sectors are being developed.

The COA recognized the need for the County to continue to implement its Senior Agenda and Community for a Lifetime goals and approved this summer study. The three-session study investigated the roles of the County Planning Department and Board, Executive Departments, County Council, developers, the public and the COA in addressing senior concerns in planning.

In September 2014 the COA approved the following recommendations:
1. The COA should advocate for inclusion of a "Seniors" Section in all Master Plans and Sector Plans.
2. The COA should expand the Senior Agenda, using resources cited in this report (e.g. the World Health Organization [WHO] Checklist of Essential Features of Age Friendly Cities) and other resources. This would ensure comprehensive coverage of all the key features of an Age Friendly County and will guide the County Council, County Departments, Planners, Developers, and Advocates in making the County a more livable community for older adults.
3. The COA should recommend that a high-level staff position be created on the County Planning Board to advocate and promote senior issues.
4. The COA should recommend that the County Executive and the County Council coordinate to have a representative from the Planning Board on the Senior Sub-Cabinet, engaging fully as a member with senior County Department Heads.
5. The COA should provide leadership and strong advocacy for older adults in the planning process by building relationships and strategic partnerships with the government, for-profits and non-profits sectors.
6. The COA believes that Montgomery County should become a WHO Age Friendly City (County) because it is a comprehensive approach to ensure that the needs of older adults and everyone else in the community are met. Therefore, COA should advocate with the County Executive/Council that a task group be formed to explore the steps and resources involved in Montgomery County joining the WHO Age Friendly Cities program.

(A)

PROGRESS REPORT

From recent discussions with Maryland National Capital Park and Planning Commission (MNCPPC) high-level staff we are pleased that the study will apparently lead to implementation of solutions based on awareness of needs suggested by Recommendations 1, 3, 4 and 5. Representatives of MNCPPC have been invited to join the County 's Senior Sub-Cabinet and productive discussions with the Chief of the Research and Special Projects office of the Planning Department have indicated a strong willingness to assign responsibility per recommendation 3, to a senior staff member. These solutions require neither budgetary nor legislative action. However, it would be beneficial if the County Council were to oversee the implementation by MNCPPC on these particular concerns.

In addition, regarding Recommendation 2, the COA is going to undertake a review of the Senior Agenda and the WHO Age-Friendly Cities Checklist to determine what improvements can be made to the Senior Agenda to make its topics and recommendations more comprehensive and measureable. The COA Data Task Force will also engage in this task.

REQUESTED COUNTY COUNCIL ACTION

The COA believes that Montgomery County should become a WHO Age Friendly City (County) because it is a comprehensive approach to ensure that the needs of older adults and everyone else in the community are met. Therefore, COA should advocate with the County Executive/Council that a task group be formed to explore the steps and resources involved in Montgomery County joining the WHO Age Friendly Cities program.

REASONS

ECONOMIC AND COMPETITIVE BENEFITS TO MONTGOMERY COUNTY BY PARTICIPATION IN THE WORLD HEALTH ORGANIZATION "AGE-FRIENDLY CITIES" PROGRAM

Population ageing and urbanization are major forces in Montgomery County. The 2014 COA Summer Study recommended that Montgomery County (MC) participate in the World Health Organization "Age-friendly cities" program to enable the County to adapt its structures and services to be accessible and inclusive of all residents with their varying needs and capacities. Participation in the WHO Age-Friendly Cities program informs government policies and planning on housing, transportation, social participation, outdoor spaces and buildings, community support and health services, communication and information and civic participation and employment. It is an extraordinary long-term public relations move that immediately gives us a competitive advantage in the worldwide economic market by distinguishing us from our capital area competitors.

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However, COA also recommended that prior to MC embarking on becoming a WHO Age-Friendly Community, that it explores the steps, resources including costs and benefits involved in undertaking this objective. An approach COA is considering is forming a task group as part of a Summer Study in 2015 to undertake this exploration and to make recommendations based on the study results.

It is respectfully requested that this Committee take such steps, as it deems necessary and appropriate to support the recommendations of the Commission on Aging.

Sincerely,

Judith Levy

Chair, Commission on Aging

Charles Kauffman

Chair, Summer Study on the Need
for An Advocate for Older Adults
on the Montgomery County
Planning Board

FINAL REPORT

COMMISSION ON AGING

SUMMER STUDY PROGRAM

THE NEED TO IMPROVE ADVOCACY FOR OLDER ADULTS IN MONTGOMERY COUNTY PLANNING

September 1, 2014

Charles Kauffman, Summer Study Chair

Report Co-authors: Charles Kauffman, DaCosta Mason, Isabelle Schoenfeld

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BACKGROUND AND APPRECIATION

The Commission on Aging (COA) serves as an advocate for the health, safety and well-being of Montgomery County's older residents. Annually, the COA conducts Summer Studies on issues of concern to the community.

This study arose from concerns that despite the increasing number of older adults in the County, they lack adequate visibility and representation in the County's planning process when Master Plans and Sector Plans are being developed. This report explores these issues and makes recommendations to increase participation and representation in fulfilling the County's Senior Agenda objectives for a Community for a Lifetime.

On behalf of the Commission on Aging Summer Study, we thank our moderator Kenneth Hartman, for his generosity, vision and guidance throughout the Study. We also extend our boundless appreciation for the clarity, brilliant leadership and empathy of Dr. Odile Brunetto, our COA guardian angel. We are so fortunate to have their understanding, commitment and skillful guidance.

We thank our panelists Ann Meade, Bob Kaufman, Gwen Wright, Rick Nelson, Gail Kohn, Elinor Ginzler, Chuck Short, Tedi Osias and Rose Krasnow for their generosity in sharing insights, information, experience and valuable suggestions. It is important for the Commission to maintain close personal relationships with them. We are delighted with the discussions and interaction of participants, guests and members of the COA which clarified many issues, and suggested a medley of achievable recommendations.

We thank DaCosta Mason and Isabelle Schoenfeld for their extreme patience, and valuable contributions to this report, and recommendations to the COA.

We are grateful to the County and the COA for allowing us to initiate and lead this Summer Study. It surpassed our expectations and allowed us to engage with experienced, intelligent and deeply committed individuals whose recommendations will enhance living in Montgomery County for decades to come.

Respectfully submitted,

Charles Kauffman, Chairman

1. EXECUTIVE SUMMARY

Jane Jacobs said *"Cities have the capability of providing something for everybody, only because, and only when, they are created by everybody."*

Montgomery County's rapidly growing older adult population will soon include 20% of the County's residents. However, it is questionable whether senior needs will receive adequate attention in the County's planning process over the next 20 years. Currently, the County's Master and Sector plans call for massive mixed-use, residential and commercial urban complexes located at highway and public transit hubs, i.e., White Flint, Westbard, Kensington, Chevy Chase Lake, and a dozen others.

On May 22, 2014, the Commission On Aging (COA), recognizing the need for the County to continue implementing the Senior Agenda and Community for a Lifetime goals, and the need to enhance older adult representation in County planning, approved a summer study to:

1. Interview key members of the planning board; understand the board's composition, its legal basis and the appointment process; assess the role of developers, county departments, land use attorneys and the branches of the County government.
2. Interview senior planners in order to develop a checklist of senior essentials. Define the job of a senior representative (and make clear that there may be conflict resolution processes in which said representative will participate)
3. Interview members of the Committee of the County Council (PHED Committee) and representatives of the County Executive to determine the best legal *way to obtain high level staff representation on the Planning Board.*

The three-session study investigated the roles of the County Planning Department and Board, Executive Departments, Council, developers, the public, and the COA, in addressing senior needs. Each session's invited experts provided information and insights, identified gaps in those roles, and suggested means to address them.

The Summer Study "Recommendations" will ensure that
- senior concerns are recognized throughout the planning and development process
- all sectors of the County are working towards a livable community
- there is improved communication and coordination between government entities
- the COA's advocacy role is strengthened
- Montgomery County will consider implementing AARP'S "Livable Communities" and the World Health Organization (WHO) "Age Friendly Cities" program and checklist, providing global stature and economic growth for the County and fulfilling its Senior Agenda and Community for a Lifetime goals.

2. RECOMMENDATIONS

1. The COA should advocate for inclusion of a "Senior" Section in all Master Plans and Sector Plans.

2. The COA should expand the Senior Agenda, using resources cited in this report (e.g. the World Health Organization [WHO] Checklist of Essential Features of Age Friendly Cities) and other resources. This would ensure comprehensive coverage of all the key features of an Age Friendly County and will guide the County Council, County Departments, Planners, Developers, and Advocates in making the County a more livable community for older adults.

3. The COA should recommend that a high-level staff position be created on the County Planning Board to advocate and promote senior issues.

4. The COA should recommend that the County Executive and the County Council coordinate to have a representative from the Planning Board on the Senior Sub-Cabinet, engaging fully as a member with senior County Department Heads.

5. The COA should provide leadership and strong advocacy for older adults in the planning process by building relationships and strategic partnerships with the government, for-profits and non-profits sectors.

6. The COA believes that Montgomery County should become a WHO Age Friendly City [County] because it is a comprehensive approach to ensure that the needs of older adults and everyone else in the community are met. Therefore, COA should advocate with the County Executive/ Council that a task group be formed to explore the steps and resources involved in Montgomery County joining the WHO Age Friendly Cities program.

3. SUMMER STUDY SESSION SUMMARIES AND OBSERVATIONS

The Summer Study consisted of three sessions with invited professionals and high level county staff who brought special expertise to each of the sessions. The first two sessions were a panel format and the third session was a roundtable format. Charles "Chuck" Kauffman, the Chair of the Summer Study, introduced each session. The overall plan for the three sessions was described by the Chair:

1. *Interview key members of the planning board: understand the board's composition, its legal basis and the appointment process; assess the role of developers, county departments, land use attorneys and the branches of the County government.*
2. *Interview senior planners in order to develop a checklist of senior essentials. Define the job of a senior representative (and make clear that there may be conflict resolution processes in which said representative will participate)*
3. *Interview members of the Committee of the County Council (PHED Committee) and representatives of the County Executive to determine best legal way to obtain high-level staff representation on the Planning Board.*

Ken Hartman, Director of the Bethesda Chevy Chase Regional Services Center served as the moderator of each session. See Section 4 for the minutes of each session, Section 5 for a list of the participants, and Section 6 for each of the speaker's biographical sketch. A summary of each of the sessions follows:

Session 1 – June 12, 2014

Invited Experts: S. Robert "Bob" Kaufman, Vice President for Government Affairs of the Maryland National Capital Building Industry Association; Anne M. Mead, Partner, Linowes and Blocher LLP; Gwen Wright, Director, Montgomery County Planning Department

Chuck Kauffman stressed in his opening remarks that the purpose of the summer study is to advocate for older adult concerns during the county planning process (see Section 7A for the Summer Study Proposal). He stated that the goal for the first session was to learn about the planning board and the planning process and assess the role and interests of developers and land use attorneys.

The panelists were asked the following question: What are the opportunities for community input to the county planning process?

Gwen Wright summarized the planning and review processes and demographic trends in the county. She indicated that only 20% of remaining land can be developed because of constraints. She pointed out that plans are not yet formulated when early outreach meetings are held, planners cannot control the market, and property owners are decision-makers about specifics of land use. (See Section 7C for Ms. Wright's power point presentation and an Organizational Chart of the Planning Department)

Anne Mead said that property owners are very varied. She pointed out that sector and master plans have a 20 year lifespan and that recommendations from the community are important to land owners. Also, there are opportunities to plan for multi-generational projects.

Bob Kaufman noted that private and public interests have a dynamic relationship that differs in each jurisdiction. He stated that economic opportunity drives development. He indicated that the private sector wants to know upfront, early in the process, what the community wants and then determine

how to meet wants while making a profit. He pointed out that jurisdictions vary in the incentives or regulatory relief. For example, Arlington County has density rules that benefit both younger groups and seniors. Virginia provides incentives for low income and senior housing. In Frederick County, MD the approval process takes about 1 year vs. the 3-4 years in Montgomery County.

Observations:
- Plans are not yet formulated when Planning Department early outreach meetings are held. Older adults do attend such meetings but do not speak with a single voice and are not an effective lobby
- Residents should engage early on in the planning process when plans are not yet formulated
- Older adults can strengthen their voice in the process if priorities are clearly defined and they become a constituency and advocate for priorities, as the environmental lobby does now
- One way to meet public goals is by offering incentives, grants and/or regulatory relief to developers. There are advantages of developing for older adults, e.g., they don't need schools. Therefore there is more land available and density can be increased
- Identify models (e.g., Colorado, North Carolina, Delaware) for incentives that work in other jurisdictions and see what they offer

Session 2 – July 10, 2014

Invited Experts: Elinor Ginzler, Senior Director, Center for Supportive Services, Jewish Council for the Aging of Greater Washington; Gail Kohn, Age-Friendly DC Coordinator; Richard "Rick" Nelson, Director, Department of Housing and Community Affairs, Montgomery County, MD

Chuck Kauffman introduced and welcomed the invited experts. He recapped the highlights of the first session. The focus of this session initially was to establish a basis for checklist of senior requisites and define the role of a planning board "senior" issue staff specialist.

Gail Kohn stressed that the elements of a good community that appeals to older adults also appeals universally across different age groups and that people want to live among multi-aged neighbors. Gail spoke about the World Health Organization (WHO) Age Friendly Cities initiative and their domains and checklist. The WHO checklist (see Section 7D) promotes physical changes as well as a cultural shift. She discussed the steps involved in becoming an Age Friendly City. Age Friendly DC established 10 Task Force groups for each of the eight WHO domains (outdoor spaces and buildings; transportation; housing, social participation; respect and social isolation; civic participation and employment; communication and information; community and health services) plus two local domains, i.e., emergency preparedness and elder abuse and neglect and fraud. She indicated the importance of the participation of the different sectors of the community including business and academic.

Elinor Ginzler discussed the AARP Livable Communities effort over the last 15 years including prioritizing supportive community services and adequate mobility options that facilitate personal engagement of residents in civic and social life. She said that 95% of seniors don't move and moves primarily occur to be near friends or family or because of health issues. She related some findings that indicate that high community engagement contributes to higher life satisfaction and the connection between a person's behavior and feelings of well-being.

Rick Nelson emphasized that there is not one solution and there is a question about whether planners really listen to local needs. He talked about the FY 15 collaboration between DHCA and the Planning Board on affordable housing near the Purple Line. He also mentioned that there is a housing needs assessment underway. Rick recommended: 1. Establish a framework of senior issues in every plan to be addressed with or without proposed staff person/senior advocate, 2. Locate proposed staff

position [advocating for Seniors in Planning process] in the Executive Office and not in the Office on Aging; 3. Ensure that the executive branch looks more closely at all master plans in context of housing and senior services.

Observations:
- The person who leads an Age Friendly City or other similar type of effort should be located in the Executive Office for influence and political capital
- Strategic and other plans should incorporate goals associated with age friendly living.
- Consider integrating the WHO domains (in the Age-Friendly Checklist) into the Senior Agenda (see Senior Agenda in Section 7B)
- Every plan should include a section devoted to senior issues
- Important to bridge the unique structure of the Planning Department with the Executive Branch
- Consider promoting a staff position who would advocate for older adults in the Executive Branch
- Important to get agreement between the Planning Department and the Executive Branch on questions to be addressed during the master planning process relative to housing and senior services
- Need for a coordinated effort between advocacy groups to generate interest and to vocalize older adults needs in the planning process for all projects

Session 3: July 31, 2014

Invited Experts: Rose Krasnow, Assistant Director, Department of Planning; Rick Nelson, Director, Department of Housing and Community Affairs; Tedi Osias, Advisor to Councilmember Nancy Floreen on Land Use and Housing; Charles "Chuck" L. Short, Special Assistant to County Executive Ike Leggett

Chuck Kauffman provided an overview of the prior sessions and noted that one of the purposes of this session was to determine ways and means in the County executive and legislative process of obtaining high level staff attention to "senior concerns" on the planning board. The moderator, Ken Hartman, opened the discussion on how Montgomery County measures up in the senior engagement and the planning process.

The third and final session was conducted in a roundtable format with open discussion by all attendees.

Demographics in the county indicate that some communities, such as Bethesda and Chevy Chase, have 65+ populations of more than 20%. The planning process therefore needs to take into greater account the needs of older adults.

The Planning Board is using new technology to permit participation in the planning process without having to attend hearings. The Planning Board also uses on-line surveys, email comments, twitter and video streaming to increase participation. Nevertheless, it is multi-faceted and requires an understanding of all phases of the planning process and the differences in the various plans and operational issues.

Observations:
- The Planning Process is a complex system to understand and navigate for most citizens and especially for older adults. There are multiple sectors involved including the Planning Board, County Council, Executive Branch agencies, advocacy groups, and individuals
- Need to educate the community in an effort to develop and increase the number of advocates

- Need for greater expertise on the changing needs of older adults by advocates and those in decision-making positions
- Need for advocacy groups to establish relationships with other organizations in the community
- Consider updating the 2007 Towson University study on the needs of older adults
- Include an older adults category in the development of Master and Sector Plans as there are for child care and the environment
- Develop agreed upon elements of an age friendly community between the County Executive, County Council and the Planning Board; add more specificity to the Senior Agenda
- Recruit members for COA with specific needed expertise
- COA should create more partnerships and relationships with decision-makers, advocacy groups, community organizations and other change agents

4. MINUTES OF SUMMER STUDY SESSIONS

JUNE 12, 2014 SESSION

The first session of the Summer Study was held on June 12, 2014 at 401 Hungerford Dr., Rockville. Chair, Chuck Kauffman introduced and thanked the speakers, Gwen Wright, Head Montgomery County Planning, Ann Meade, land use attorney, Bob Kaufman, a developer and Ken Hartman, BCC Regional Services Center director. Attending were Commissioners Chuck Kauffman, Miriam Kelty, Isabelle Schoenfeld, Sally Shea, Jerry Morenoff, Reuben Rosenfeld, Jack Sprague, Sayed Yusef, and Austin Heyman, Leslie Marks, Robin Henoch, Mitch Markowitz and Odile Brunetto. Chuck stressed that the purpose of the summer study is to advocate for older adult concerns during the county planning process. He posed the question: What are the opportunities for community input to the county planning process? Is community involvement in the process meaningful? Does it provide adequate input for seniors to express their needs?

Gwen Wright was the first presenter. She summarized the planning and review processes and demographic trends in the county. She is working to make the planning process responsive to the new reality of the County: only about 20% of remaining land can be developed because of constraints; small area plans are replacing large area plans; public policy goals will be respected, e.g. green space is being preserved and growth corridors are near transit; transit-oriented development; affordable housing; and increased outreach in the planning process to involve residents.

She pointed out that plans are not yet formulated when early outreach meetings are held and suggested that these meeting are worthwhile to participate in. She noted that seniors do attend such meetings and ask for health care services near housing, recreation space, and nearby shopping. She added that planners cannot control the market – property owners are decision makers about specifics of space use. Discussion noted that millennials and seniors are seeking similar services and amenities. Ms. Wright's power point presentation is attached.

Ann Meade, a land use attorney, said that property owners are very varied. She pointed out that sector plans and master plans have a 20 year lifespan, that many owners are interested in them, and that recommendations from the community are important to land owners. Some such meetings are not well attended. She recommended that residents engage in the process early. There are opportunities to plan for multigenerational projects.

Bob Kaufman noted that private and public interests have a dynamic relationship that is different in every jurisdiction. He said that economic opportunity drives development. For example, SC market forces have driven senior housing in that state, while Silicon Valley market forces drive other development. He said the private sector wants to know up front, early in the process, what the community wants and then will figure out how to meet wants and make a profit. He noted many constraints map with both the site to be developed and with the county approval process. One way to meet public goals is by offering incentives, grants and/or regulatory relief. He said there is tension among different markets and that markets change. But, there are some advantages of developing for seniors, e.g. they do not need schools. Therefore there is more land available and density can be increased. He said the MCNPPC does not make it easy for developers to cater to seniors and contrasted MoCo with Arlington county which he said appeals to both younger groups and to seniors because of its density rules. Virginia provides incentives for low-income and for senior housing. He recommended that the Summer Study group identify models that work in other jurisdictions and see what they offer. Examples of places friendly to development for seniors include Colorado, NC and DE. Incentives for developers and low or no state taxes for seniors make some places attractive for aging in place.

Several specific examples were discussed. Builders build up rather than at ground level (which does not require steps). The reason is partly aesthetic and partly economic – people like homes that are elevated and building up involves less dirt to move and easier water control. Without incentives, e.g. reduced permit and other fees, it is unlikely that developers will build at ground level to make homes accessible. It was pointed out that some design features that are important to seniors are probably economically feasible, e.g. benches along streets and walkways, solid walks as opposed to brick pavers, adequate lighting and pedestrian friendly features. A member pointed out that often we plan for yesterday's needs, e.g. libraries that are large to house books in an era when electronic media are being used more frequently and when those media may be well suited to seniors' needs (can enlarge type, increase brightness, easy to carry and hold, etc) There was agreement that adapting to change is necessary.

Frederick was mentioned as an example of a nearby jurisdiction that is more development-friendly. For the developer, the approval process there takes about one year vs. 3-4 years in MoCo.

A member asked whether the MCNPPC has a research division – it does. It was stressed that community involvement early in the planning process is an effective strategy.

The needs of seniors are known and should be taken into consideration when undertaking infill development, urban or suburban development. The lack of transportation within communities was noted as a problem and as an example of the lack of but need for integrated planning across county government departments/agencies. Other needs were mentioned: single family homes on one level, more accessory apartments, elevators (can be planned for as options if stack closets on top of one another), and forest conservation.

The guests agreed that seniors can strengthen their voice in the process if we define priorities clearly and become a constituency and advocate for our priorities, as the environmental lobby does now. Although there are a high proportion of seniors who come to hearings and community meetings, they do not speak with a single voice and are not an effective lobby. Also, seniors and their advocacy groups need to educate themselves about the developers'/builders' world and think in terms of incentives rather than in terms of restrictive regulations and mandatory requirements. Many developers live in MoCo and want to succeed in building community Improving our community is a common goal. We need balance, regulations that are meaningful and serve to protect citizens, and input from communities about their priorities.

Miriam Kelty
June 11, 2014

JULY 10, 2014 SESSION

The second session of the Summer Study was held on July 10, 2014 at 401 Hungerford Dr., Rockville. Chair, Chuck Kauffman thanked the speakers and introduced Ken Hartman, BCC Regional Services Center director. Mr., Hartman introduced the speakers: Gail Kohn, Age-Friendly DC Coordinator, Elinor Ginzler, Senior Director of the Center for Supportive Services at the Jewish Council for the Aging of Greater Washington and Rick Nelson, Director of the Department of Housing and Community Affairs of Montgomery County. In attendance: Syed Yusef, Gail Kohn, Charles Kauffman, Elinor Ginzler, Mitch Markowitz, Katherine McCallum, Rick Nelson, Judith Levy, Stephanie Dowling, Sally Shea, DeCosta Mason, Robin Henoch, Leslie Marks, Austin Heyman, Reuben Rosenfeld, Jerry Morenoff, Ken Hartman, Odile Brunetto, Isabelle Schoenfeld, and Arva Jackson. There was a brief recap of last meeting and Ken Hartmann talked about this middle session being an opportunity to narrow the focus and look for areas and opportunities for change.

Gail Kohn was the first presenter. She prioritized openness and honesty, creating relationships across generations and providing continuum to ensure people have ways to engage in community and have access to required services. She stressed that elements of good community that appeal to older adults appeal universally across ages and that people want to live among all-aged neighbors. Ms. Kohn talked about the World Heath Organization (WHO) Age Friendly Cities domains and checklist. She emphasized that checklist promotes a cultural shift not just physical changes. She outlines steps including data collection, listening to residents/consumers, planning, implementation and progress evaluation. He talked about Walking block by block. MS. Kohn discussed progress on WHO checklist in varied cities/regions including DC, New York City and Portland. She discussed the pros/cons of having a scholastic leader and inherent political challenges. The DC effort is located in the executive office rather than Office on Aging, which Ms. Kohn recommends for influence and political capital. Ms. Kohn suggested fragmenting goals to make process manageable and identifying Age Friendly living as goal into local strategic plans. She suggested generating specific community involvement, incorporating the business community to capitalize on economic influence of older consumers. Ms. Kohn described DC's 10 task force committees broken down by 8 WHO domains plus 2 local (emergency preparedness and elder abuse, neglect and fraud). Ms. Kohn talked about DC budget ($250,000 annually), importance of intergovernmental cooperation and issue that the planning department is outside structure of executive arm in Montgomery County. The DC needs assessment and more information is available at http://dcoa.dc.gov/page/age-friendly-dc-initiative.

Elinor Ginzler spoke next and discussed the AARP Livable Communities effort over last 15 years including prioritizing supportive community services and adequate mobility options that facilitate personal engagement of residents in civic and social life. She said 95% of seniors don't move and moves primarily occur to be near friends/family or because of health issues. Ms. Ginzler reviewed some findings that indicate that high community engagement contributes to higher life satisfaction. She also discussed the connection between a person's behavior and feelings of wellbeing. She emphasized the importance of listening and focusing on details when planning, citing example of Mo Co community that appeared to have good access and resources but where people were less satisfied than more rural areas of the county. Ms. Ginzler talked about the difficulty getting access to variety of people and avoiding listening repeatedly to the same people.

Rick Nelson spoke next, emphasizing first that there is not one solution and questioned if planners have really listened to local needs. He talked about affordability and resident's desire for county support because they are resistant to using their equity because they want to preserve it for their families. Mr. Nelsonemphasized the importance of bridging the unique structure of Park and Planning Department and the Executive branch. He talked about the FY 15 collaboration between DHCA and the Planning Board on affordable housing near the Purple Line. Mr. Nelson said there is a housing needs assessment underway. He suggested that it is critical to get agreement between Parks and Panning and the Executive branch on a series of questions to be addressed during the master planning process. He emphasized the importance of having services in all types of housing for seniors.
He is an advocate for senior only housing especially in transit friendly areas. Mr. Nelson's recommendations included:
1. Establish a framework of senior issues in every plan to be addressed with or without proposed staff person/senior advocate
2. Locate proposed staff position in the Executive Office not Office on Aging
3. Ensure that the executive branch look more closely at all master plans in context of housing and senior services
Questions/issues from attendees included
1. Some people won't want to have change and will question what do we "offer" to facilitate change. Some people will oppose and consider change to be a problem

2. There is a bifurcated experience in Montgomery County, noting lower income/hidden poverty in Mont. County
3. Suggestion to recruit more middle aged members of the Commission on Aging to bridge interest groups
4. Noted a range of civic engagement opportunities down county vs. up county
5. Called for a coordinated effort between advocacy groups to really generate interest and vocalization of senior needs in the planning process for all projects
6. In response to request for clarification on WHO participation Ms. Kohn explained that WHO participation can be at local or regional level and is as simple as sending a local proclamation She said there are no stringent progress requirements and that progress is measured locally. WHO does offer feedback on progress in other localities
7. There was an articulated goal for integrating the WHO domains into the Senior Agenda to provide a roadmap and help fill in details for the Senior Agenda and an
8. Idea to coordinate with Village effort to capitalize of grass roots advocacy strength

Sally Shea
July 17, 2014

JULY 13, 2014 SESSION

The third and final session of the Planning Process Summer Study was held on July 31, 2014 at 401 Hungerford Drive, Rockville, Maryland. Chuck Kauffman, Chair of the Summer Study, thanked the invited guests and participants and introduced the moderator, Ken Hartman. Mr. Hartman introduced the invited guests, Rose Krasnow, Chuck Short, and Tedi Osias. Others in attendance included: Rick Nelson, Pat Brennan, Miriam Kelty, Arva Jackson, Jerry Morenoff, Syed Yusef, Jack Sprague, Isabelle Schoenfeld, DaCosta Mason, Sally Shea, Austin Heyman, Leslie Marks, Irene Hoskins and Odile Brunetto. Unlike the prior sessions, the final session used a roundtable format rather than a panel format.

After an overview of the prior sessions, the moderator opened the discussion on how Montgomery County measured up in senior engagement and the planning process. Demographics in the county indicate that some communities, such as Bethesda and Chevy Chase, have 65+ populations of more than 20%. As the county goes through the planning process, more and more the needs of older adults must be taken into account. While seniors want the same things in their communities as everyone else, there are some things about which seniors have particular concerns. Some of the particular concerns for seniors include, but are not limited to:

- Pedestrian crossings sufficient in number and safe for people with different levels and types of disabilities
- Green spaces and outdoor seating that are sufficient in number, well maintained and safe
- All areas and services are accessible by public transport with good connections
- Sufficient affordable housing is available in areas that are safe and close to services and the rest of the community.

For its part, the county has adopted the Senior Agenda in an effort to make the community more age-friendly. In addition, even though large numbers of seniors have not participated in the planning

hearings, the Planning Board is using technology to permit participation in the process without having to attend the hearings. The Board uses on-line surveys, email comments, twitter and video streaming to increase participation. Even so, the planning process remains a complex system to understand and navigate for most citizens and especially so for seniors.

The planning process in the county is multifaceted and requires an understanding of all phases of the process. A number of governmental entities and agencies, as well as advocates and individuals are involved in the process. There is not only the need to understand the role of the Planning Board, County Council and the many administrative agencies involved in the process, but to recognize the difference between the Master Plan development process and the operational issues that fill-in the specific needs of the community.

With so much to understand, the following are suggestion on how seniors can have more impact on the planning process.

- Educating the community in an effort to develop and increase the number of advocates
- There is a need for more expertise on the needs of seniors among advocates and those in decision-making positions
- There is a need for more senior advocacy groups with relationships with other organizations in the community
- Data collection – should the county consider undertaking a needs assessment on senior issues (perhaps it is time to update the 2007 Towson University study on the needs of older adults)
- There should be a Seniors category in the Master Plan development or other parts of the planning process like there is for environment and child-care
- Development of agreed upon elements of an age-friendly community between County Executive, County Council and Planning Board – see the World Health Organization checklist, add more specificity in the Senior Agenda
- Recruit members of the Commission on Aging with specific expertise on issues such as planning, transportation, housing, and aging in place
- The Commission on Aging needs to create more partnerships and relationships with decision-makers, advocacy groups, community organizations and other change agents.

The moderator thanked the attendees for their ideas and participation and encouraged the Commission on Aging to continue its work to make Montgomery County a more age-friendly community.

A report will be written on the summer study with specific recommendation for the Commission on Aging. The report will be available on the Commission on Aging website in the fall.

5. SUMMER STUDY SESSIONS PARTICIPANTS

Dr. Odile Brunetto (Sessions 1,2,3)
Kenneth Hartman, Moderator (Sessions 1,2,3) (Section 7 – Biography)

A. COA COMMISSIONERS
Charles Kauffman, Chairman (Sessions 1, 2, 3)
Syed Yusuf (Sessions 1,2,3)
Miriam Kelty (Sessions 1,3)
Isabelle Schoenfeld (Session 1,2,3)
Jack Sprague (Session 1,3)
Sally Shea (Sessions 1,2,3)
DaCosta Mason (Sessions 2,3)
Reuben Rosenfeld (Sessions 1,2)
Jerry Morenoff (Session 1,2,3)
Arva Jackson (Session 2,3)
Judith Levy (Session 2)

B. GUEST PANELISTS – (Section 6 – Biographies)
Gwen Wright (Session 1)
Bob Kaufman (Session 1)
Ann Meade (Session 1)
Gail Kohn (Session 2)
Elinor Ginzler (Session 2)
Rick Nelson (Session 2,3)
Chuck Short (Session 3)
Rose Krasnow (Session 3)
Tedi Osias (Session3)

C. OTHER ATTENDEES
Leslie Marks (Sessions 1,2,3)
Austin Heyman (Sessions 1,2,3)
Mitch Markowitz (Sessions 1,2)
Robin Henoch (Sessions 1,2)
Katherine McCallum (Session 2)
Stephanie Downey (Session 2)
Pat Brennan (Session 3)
Irene Hoskins (Session 3)

6. BIOGRAPHIES OF SPEAKERS

Odile Brunetto. Ed.D. March 2013

H: 18128 Hayloft Drive Rockville MD 20855 cell 703-380-9220
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Odile.brunetto@montgomerycountymd.gov

Current Position: Director, Area Agency on Aging, Montgomery County,

Maryland , Department of Health and Human Services/Aging and Disability

From 1999 to 2008 ,Chief of Aging and Disability Services, Department of

Health and Human Services, Arlington County, Virginia

From 1988 to 1999, served in different managerial and professional

capacities, in Montgomery County, Maryland, with the Department of

Health and Human Services, Aging and Disability Services.

From 1984 to 1988, served in different professional and managerial

capacities in the Mental Retardation Office of the Fairfax -Falls Church

Community Services Board, Fairfax County, Virginia .

From 1979 to 1984, employed as a Teaching Assistant with the Special

Education Department of the George Washington University. Taught at the

graduate and undergraduate levels.

Volunteer with Hospice of the National Capital Region 2005-2007

Graduate Leadership Arlington ,Class of 2006.

Volunteer with Leadership Arlington , 2007-2009

Graduate Senior Leadership Montgomery, May 2011

Board Member , Maryland Gerontological Association, 2011 to present

Board Member ,National Association Area Agencies on Aging, 2011 to

Immigrated to the United States in 1977.

Received a Doctoral Degree in Education from the George Washington

University in Washington DC in 198

Kenneth Hartman, Director Bethesda-Chevy Chase Regional Services Center, Moderator

Ken Hartman was appointed Director of the Bethesda-Chevy Chase Regional Services Center, one of five satellite government centers in Montgomery County, in January 2008. The Centers are designed to bring direct services to the public and to enhance the link between citizens and government.

In this capacity, Mr. Hartman leads interagency efforts to improve services to the region; works closely with business and civic communities to address service needs; and oversees promotion and maintenance of downtown Bethesda. During his tenure, he has worked to promote community leadership; develop community-based partnerships that serve the needs of older adults; expand programs at the BCC Center; and build urban services in White Flint – all during a period of dwindling resources.

Mr. Hartman serves on boards of directors for several local non-profit organizations including Bethesda Urban Partnership, Glen Echo Park Partnership for Arts and Culture, and Bethesda Green.

Mr. Hartman began his career in local government 20 years ago as an aide to Montgomery County Councilmember Betty Ann Krahnke. Since that time, Mr. Hartman has served in a variety of high-profile positions for Montgomery County and the City of Rockville - as manager of project outreach for in the Rockville City Manager's office, legislative analyst for the Montgomery County Council, and five-years as chief of staff for former Montgomery County Councilmember Howard Denis.

Mr. Hartman holds a Master of Public Administration degree from Virginia Tech. He resides in Bethesda with his wife and two children.

Gwen Wright, Director Montgomery County Planning Department

Since July 2013, Gwen Wright has been the Director of the Montgomery County Planning Department of the Maryland-National Capital Park and Planning Commission. In this role, Ms. Wright oversees a wide range of projects that aim to improve the quality of life in Montgomery County by conserving and enhancing the natural and built environment. Montgomery County is one of the largest jurisdictions in Maryland with over 1 million residents and has a key role in the dynamic Washington D.C. metropolitan growth area. Ms. Wright also worked for the Montgomery County Planning Department from 1987 to 2008. During this period, she served as the Chief of Countywide Planning, including supervising the Environmental Planning, Transportation Planning and Historic Preservation Sections, as well as serving as Acting Planning Director.

Prior to her appointment as the Montgomery County Planning Director in 2013, Ms. Wright was Chief of the Development Division for the City of Alexandria Department of Planning and Zoning for five years. In this position, she reviewed development proposals throughout the City of Alexandria and shepherded a wide variety of projects – from urban infill to major brownfields reclamation – through the regulatory process and implementation.

Ms. Wright began her career in Texas as the Director of Architectural Design and Redevelopment

for the Galveston Historical Foundation in Galveston, Texas. She has degrees in Architecture and Architectural History from Yale University and has spoken at numerous national and regional conferences on a wide variety of planning issues.

Ms. Wright lives in the Cleveland Park neighborhood in Washington D.C., where she is co-chair of the Cleveland Park Historical Society Architectural Review Committee. She is a member of Lambda Alpha and a graduate of ULI Washington's Regional Leadership Institute.

Anne Mead, Attorney

Anne Mead is a Partner at Linowes and Blocher LLP practicing in the areas of land use, real estate, municipal and other areas of administrative law, primarily in Montgomery County.

She regularly assists local, regional and national clients with legislative and regulation issues during all phases of the development process, including the planning, zoning, subdivision, detailed site plan, special exception (conditional use permit), zoning variance, licensing, administrative appeal and permitting processes. She also represents clients before the Maryland Courts on appellate matters.

Ms. Mead has served on numerous community, advisory and professional boards, including positions on Commercial Real Estate Women, the Greater Bethesda-Chevy Chase Chamber of Commerce, the Bethesda Urban Partnership and the Purple Line Master Plan Advisory Group. She participated in the Foreclosure Prevention Pro Bono project for the State of Maryland and was in the class of 2005 for Leadership Montgomery. She is also an adjunct professor at the Johns Hopkins Carey Business School in the Edward St. John Real Estate Program.

S. Robert Kaufman, Vice President MD National Capital Building Industry Association (MNCBIA)

September 2013

bkaufman@mncbia.org

Mr. Kaufman currently serves as Vice President for Government Affairs of the Maryland National Capital Building Industry Association. His responsibilities include Montgomery County Government Affairs, the Custom Builders Committee, the Development Process Review Committee and the Record Plat Committee. Bob supervises the Director of Government Affairs for Prince George's County and the Director of Regulatory Affairs. In 2011 and 2012, Bob served on the Land Use Subcommittee of the National Association of Homebuilders.

Prior to the MNCBIA, Bob served as Senior Vice President for Augustine Land responsible for all land acquisitions and land development and served on the Board of Directors for Augustine Homes LLC. Over the past 20 years, Mr. Kaufman worked on over 5000 acres of property resulting in over 6000 dwellings and 2 million square feet of commercial property including three golf courses communities. These communities have been recognized for their environmental sensitivity having won the Environmental Community of the Year awards in 2000, 2001 and 2002.

Mr. Kaufman served three terms as Vice President for the Maryland National Capital Building Industry Association (MNCBIA) and serves as a Life Director. Bob served on the Alexandria Affordable Housing Advisory Committee (Chair 2008-2009), the Smart Growth Alliance Conservation Committee, the Urban Land Institute Young Leaders Mentorships and the Urban Land Institute Urban Plan Committee. Past involvement also included the Board of Directors for the Center for Watershed Protection, the Tree Preservation Task Force and the Wetlands Conservation Task Force for the State of Maryland and the President's Council for Sustainable Development concerning the Chesapeake Bay. In 1994 Bob was sent to St. Petersburg Russia by USAID as part of a land use workshop with the University of Maryland. He currently serves on the Maryland Smart Growth Investment Fund Working Group under appointment by the Governor of Maryland. Known for his leadership on environmentally sensitive development, Bob is a frequent speaker on Land Use, Land Development, Green Building and Community Relations.

Prior to joining Augustine, Mr. Kaufman served as Vice President of the Michael T. Rose Consulting Company and the Michael T. Rose Land Company. Prior, Mr. Kaufman served as the Executive Vice President for the Economic Development Corporation for Prince George's County and as the Senior Economic Analyst for the Baltimore Economic Development Corporation and at the Mayor's Office of Manpower Resources.

Mr. Kaufman holds a Bachelor of Science Degree from the University of Maryland with a major in Government and Politics and minors in Business and Philosophy.

Gail Kohn, Age-Friendly DC Coordinator

Gail Kohn is a nationally recognized leader in aging services who, since mid-2013, has been the Age-Friendly DC and Coordinator, mobilizing public and private resources to transform the city into a better place for residents to live, work play in accordance with World Health Organization guidelines. Until she joined DC government, Kohn was founding director of Capitol Hill Village, a grassroots neighborhood-based non-profit organized to sponsor social opportunities and coordinate whatever-it-takes to support members' intention to stay put, building the innovative organization into one of the most successful of its kind in the country. Previously Kohn was the founding CEO of Collington, a continuing care retirement community located in Mitchellville, Maryland. While leading Collington for 18 years, Kohn was one of other leaders who created and led mid-Atlantic and national education and long term care organizations to influence the quality of care for older adults.

Elinor Ginzler, Senior Director Center for Supportive Services, JCA-GW

Elinor Ginzler is currently the Senior Director of the Center for Supportive Services at the Jewish Council for the Aging of Greater Washington. With senior staff responsibility for an array of community based programs serving older adults, she oversees a medical adult day center, a social day program for adults with early stage memory loss, caregiver education, outreach and support, senior transportation services and mobility management programs.

Prior to her position with the JCA, Ms. Ginzler was with AARP for over 14 years, most recently as the Vice President for Health Portfolio, directing strategic planning and monitoring for AARP's integrated health work including advocacy, consumer education and outreach, programs, products and services. She also served as Senior Vice President for Livable Communities Strategies in AARP's Office of Social Impact, spearheading the association's work on housing, community services and mobility options.

Ms. Ginzler joined AARP in 1998, bringing with her more than 20 years of experience in program management and development at the national, state, and community levels and experience working collaboratively with public, private, non-profit and community-based organizations.

Ms. Ginzler has been a lead spokesperson at AARP on housing, health and long term care, older driver safety, mobility options, and caregiving. She has been featured on national industry and consumer news outlets including *The Today Show, The Wall Street Journal* and *National Public Radio.* In addition, she is co-author with Hugh Delehanty of *Caring for Your Parents – The Complete Family Guide,* published by Sterling Publishing.

Ms. Ginzler holds a BA from the University of Pennsylvania and completed her graduate studies at the University of Maryland.

RICHARD Y. NELSON, JR., Director of the Montgomery County Department of Housing and Community Affairs

Mr. Nelson is the Director of the Department of Housing and Community Affairs of Montgomery County. The department's responsibilities include the Community Development Block Grant program, housing code enforcement, landlord and tenant affairs, the county affordable housing trust fund, and the county's Moderately Priced Dwelling Unit Program.

Mr. Nelson has also been a Senior Fellow at the University of Maryland, School of Public Policy. In this capacity, Mr. Nelson was an instructor in the University's established graduate level housing and community development program.

Mr. Nelson has also served as a Commissioner of the Montgomery County Housing Opportunities Commission from 1991 until 2007, where he was the Chair of the Commission for four years. He was also employed by The National Association of Housing and Redevelopment Officials (NAHRO) where he served as Executive Director from 1987 until 2001. He started his career in housing at the Department of Housing and Urban Development's (HUD) Philadelphia Regional Office.

Rose Krasnow, Deputy Director of the Montgomery Planning Department

Rose Krasnow is the Deputy Director of the Montgomery Planning Department at the Maryland National Capital Park & Planning Commission, where she has worked since 2004. Prior to assuming her current position, Rose served as the Acting Director, as Chief of Area 1 where she oversaw both regulatory and Master Plans, and as Chief of Development Review, where she managed the review of Project, Subdivision and Site Plans as well as rezoning applications and special exceptions.

Prior to her work at the Planning Commission, Rose served two terms on the Rockville City Council and three terms as Mayor of Rockville. In that capacity, she was instrumental in bringing about the redevelopment of downtown Rockville and also approved two major neo-traditional communities – King Farm and Fallsgrove. She also started the City's first non-profit economic development corporation – now known as REDI.

Rose spent four years working as a Government Bond Trader for Oppenheimer & Co. in New York City and two years as a Smart Growth Policy Analyst with the National Governors Association. She is married and has two children, now grown.
Rose received a Bachelor's Degree in Political Science from Washington University in St. Louis and a Master's in Urban and Regional Planning from the University of North Carolina in Chapel Hill.

Charles L. Short, Special Assistant to County Executive Ike Leggett

Charles L. Short
1040 Brice Road, Rockville, Maryland 20850
301 651 4750
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Professional Summary
Forty years of experience leading and administering local government and private nonprofit human service programs including nearly twenty years (1983-2002) as the Director of the principal health and human service agency of the Montgomery County, Maryland (pop. 930,000) government entailing leadership of 1,500 employees, 450 purchase of service contracts and an annual budget of 185 million dollars.

2006 to the present, Special Assistant to Montgomery County, MD. Executive Ike Leggett, advising the County Executive on a broad range of fiscal, social, political and legislative matters.
1996 to the present, adjunct professor at the University of Maryland Graduate School of Public Policy.
2002-2006, Secretary for Justice and Service, Archdiocese of Washington, D.C., appointed by Washington Archbishop Theodore Cardinal McCarrick. The Secretary oversees the Archdiocese's social concerns efforts which include non- profit direct service agencies, parish based programs, local, state and national legislative and policy advocacy, community organization and policy and program development. The Archdiocese is comprised of 144 parishes in the District of Columbia and the Maryland counties of Montgomery, Prince Georges, Charles, Calvert and St. Mary's.

Previous Positions
Secretary for Justice and Service, Archdiocese of Washington, 2002-2006
Director, Department of Health and Human Services, Montgomery County, MD, 1995-2002
Director, Department of Family Resources, Montgomery County, MD, 1983-95
Chief, Division on Children and Youth, Montgomery County, MD 1973-83
Teacher, Middle School, Holy Trinity School, Washington DC, 1969-73
Group Home Counselor, Boys and Girls Homes, Inc., 1970-73

Significant Community Activities
Presently: Chairman of the Board of Directors, St Ann's Infant and Maternity Center, Hyattsville, MD.; Chairman, Board of Advisors, The Little Sisters of the Poor Elderly Residences, Washington, D.C.; Langley Park, MD. Parish Partnership; columnist for County-wide Catholic newspaper, Our Parish Times

Recent Past Service: Board of Directors, The Ivymount School; Board of Directors, United Way of the National Capital Area; Board of Directors, The Non Profit Village, Inc.; Chairman, Archdiocese of Washington Pastoral Council; Board of Directors, Leadership Montgomery; Administrative Board of the Maryland Catholic Conference, Founding Chairman, Montgomery County Collaboration Council for Children Youth and Families.

Significant Recognitions
Peacemaker of the Year 2012, Conflict Resolution Center; Founders Award of The Foundation Schools, 2006; Outstanding Service Award, Montgomery County Regional United Way Council, 2005; The Community Ministries of Montgomery County Distinguished Service Award, 2002; The Spanish Catholic Center Miriam Aramas Award for Service, 2002; National Association of County Human Services Administrators Director's Award for Individual Achievement, 2001, Two time recipient of the Msg. Geno Baroni Advocacy Award, Catholic Charities of Washington, DC, 1988 and 2001; The 1997 Distinguished Citizen of the Year Award, The Maryland Association of Non-Public Special Education Facilities; Lehrman-Pikser Award, Jewish Social Service Agency of Greater Washington, 1992; Outstanding Community Service Award; Leadership in Diversity Award, African American Employees Association, 2000; City of Rockville, Maryland, Michael Taff Award for Human Relations, 1997; Outstanding Service Award, Montgomery County Commission for Persons with Disabilities, 1989; Outstanding Service to the Homeless Award, Maryland Governor's Advisory Board on Homelessness, 1989. Inducted to High School Athletic Hall of Fame, 2014.

Educational Background
B.A. Georgetown University, Washington, D.C. 1971
M.A. The Catholic University of America, Washington, D.C. 1974
Leadership Montgomery, 1990
Fellow, The Academy for Excellence in Local Governance,
University of Maryland, 2001

Personal
Married to Maureen O'Donnell Short, three children; resides in Rockville, MD

Tedi S. Osias, Senior policy advisor to Council Member Nancy Floreen

Tedi S. Osias is a senior policy advisor to Montgomery County Council Member Nancy Floreen, focusing on land use planning, zoning and housing issues. Prior to her current position, Ms. Osias worked at the Housing Opportunities Commission as the Director of Legislative and Public Affairs.

Ms. Osias formerly served as chief of staff to County Council member Howard A. Denis and as the Executive Director of the Montgomery County Board of Appeals. Earlier in her career Ms. Osias was a program analyst in the Office of Legislative Oversight, a county land use and transportation planner and legislative aide to then-Delegate Nancy Kopp. Among her community activities, Ms. Osias served as an independent member of the Commission for Women and is a graduate and former board member of Leadership Montgomery. She is presently Chair of Montgomery Women.

Ms. Osias holds a B.A. and an M.A. in History from Washington University in St. Louis and an M.P.A. from Harvard's Kennedy School of Government

SECTION 7. REFERENCES:

A. SUMMER STUDY PROPOSAL
B. SENIOR AGENDA
C. GWEN WRIGHT POWER POINT
D. AGE FRIENDLY CITIES CHECK LIST
E. ADDITIONAL REFERENCES

7A. SUMMER STUDY PROPOSAL

THE NEED FOR AN ADVOCATE FOR OLDER ADULT CONCERNS ON THE MONTGOMERY COUNTY PLANNING BOARD

<u>*Committees Submitting Proposal:</u>
Communications
Aging in Place
Public Policy
(*Requests pending)

ISSUE

Montgomery County's older adult population represents approximately XXX% of the County's citizens. Despite this formative representation and continued growth pattern, the County's older adults lack adequate representation on the County's Park and Planning Board. The needs of older adults pertaining to the use of land, zoning, transportation, schools, parks, libraries, fire and police stations, housing, historic preservation, pedestrian and trail systems and environmental issues are receiving minimum attention relative to other sectors of the County's population. In general, they are lacking the resources and professional representation that developers and other groups with special interests bring to the table.

Each community within Montgomery County has a Master Plan that establishes a comprehensive view of land use and future development. A list of these communities is attached. Montgomery County's older adult residents require a dedicated, knowledgeable, skilled older adult representative on the five member County's Park and Planning Board to act as their advocate. This individual would participate in drafting of master plans, reviewing applications for development and analyzing information to help public officials plan for the future.

This older adult representative on the Board would be nominated by the Commission on Aging, confirmed by the County Executive and appointed by the County Council, in the same manner as other members of the Planning Board.

ANTICIPATED OUTCOME

A strong recommendation from the COA *leading to the appointment of a high- level staff member to function as Older Adult Representative to the Montgomery County Park and Planning Board and make recommendations to Board Members in preparing, reviewing* and considering approval of master plans, preliminary plans, site plans and other development applications; advising the Council on changes to the zoning; making recommendations to the Board of Appeals on applications for special exceptions and variances; advising local, state and federal agencies on their constructions projects in Montgomery County, reviewing and approving park plans and undertaking such other matters as are normally undertaken by other representatives of the Board.

THE CONDUCT OF THE SUMMER STUDY: (REVISED)

SESSION

1. Interview key members of the planning board: understand the board's composition, its legal basis and the appointment process; assess the role of developers, county departments, land use attorneys and the branches of the County government.

2. Interview senior planners in order to develop a checklist of senior essentials. Define the job of a senior representative (and make clear that there may be conflict resolution processes in which said representative will participate)

3. Interview members of the Committee of the County Council (PHED Committee) and representatives of the County Executive to determine best legal_ *way to obtain high level staff representation on the Planning Board*.

REPORT

A realistic and achievable recommendation for permanent senior representation at all stages of the planning process in order to achieve the incorporation of maximum benefits for seniors in pending and future County developments.

Commissioner presenting proposal:

CHARLES KAUFFMAN

7B. The Senior Agenda

Montgomery County will be a community for a lifetime, a place for older adults to live safe, healthy and vital lives.

Adopted by the Montgomery County Council - December 2012

Commitment to Older Adults:

• The County will have a policy against ageism, including age stereotyping.
• Older adults are a valuable economic, cultural, and social resource and will be included in all County planning activities at the Executive and Council levels.
• Planning related to older adults will include consideration of diversity, inclusiveness, and intergenerational elements.
• Demographic data about older adults will be maintained, analyzed, and incorporated into planning.
• Resource information relevant to older adults will be distributed and accessible.
• The County will have a plan to address options for aging in place and alternatives.
• The County will promote public-private partnerships that contribute to implementation of this Agenda.

Transportation

Vision: *Montgomery County will have public and private transportation and mobility systems that enable older adults to go where they want to go, when they want to go and how they want to get there.*
• Affordable senior transportation will be a priority.
• Planning will include in-neighborhood options to make transportation accessible and to make affordable escorted transportation available.
• Planning will encompass the needs and safety of both pedestrians and those who do not drive.
• Transportation planning will include a focus on the needs of older adults as they become less able to drive.

Housing

Vision: *Montgomery County will promote choices of dwelling types so that as the needs and preferences of older adults change, they can age in place, downsize, choose rental or ownership, or find housing with the appropriate level of supportive services without having to leave the community.*
• Affordable senior housing will be promoted and made available.
• Housing options and alternatives will be part of County planning efforts.
• Visitable and livable options will be included in County planning.
• New and existing construction and redevelopment will consider the needs of both current and prospective older residents.
• The County will assist and encourage efforts to create supportive communities such as villages, co-housing and other options.
• Redevelopment planning will encourage walkable communities.
• Planning efforts will include public-private partnerships as an option to providing housing suitable for older adults.

Socialization and Leisure

Vision: *Montgomery County will encourage and support vital living of older adults by providing opportunities for physical, mental and social interaction.*

• Recreation programs will facilitate socialization and other activities that integrate health and wellness.

• Recreation programs will be available and easily accessible to older adults throughout the County, particularly in areas where there are no senior centers.

• Lifelong learning opportunities will be available.

• Libraries will be a location of activities and resources for older adults.

• Active efforts will be made to engage older adults as volunteers.

Health and Wellness

Vision: *Montgomery County will expand public health and prevention programs that promote physical, mental, social and environmental health for older adults.*

• Healthcare providers will be encouraged to accept private and public health insurance including Medicare and Medicaid.

• Medical care for older adults will be available, accessible, and affordable.

• Direct services and educational programs to plan for serious illness and to manage chronic diseases including promotion of self-management programs will be a priority.

• Access to hearing and dental care will be available.

• Nutrition support including education and meals will be provided.

• Specialized mental health care will be available as an integral part of the health services delivery system.

• Caregiver support will be a priority.

• Services to address cognitive impairment will be available, accessible and affordable for affected older adults and their families and caregivers.

Vision: *Montgomery County will distribute and publicize re-cognizable, understandable, timely, and accessible information on County and public resources and services for older adults.*

• Information will be understandable and accessible by older adults and their caregivers in diverse ethnic population groups

• Information will clearly state who is eligible for services at no cost and who is eligible at specified costs.

• Information for older adults will be branded uniformly for consistency and recognizable identification

• The County will use and publicize multiple media to disseminate information relevant to older adults, including social media, its regularly updated website and a 24/7 information resource line.

Employment

Vision: *Montgomery County will recognize the extent and value of the contribution of older adults to the economy.*

• The County will encourage County agencies and private companies to offer employment opportunities as older adults transition to retirement.

• The County will provide information that promotes the value of older workers.

• The County will encourage job fairs, partnerships, and forums to help older adults prepare themselves to continue in or reenter
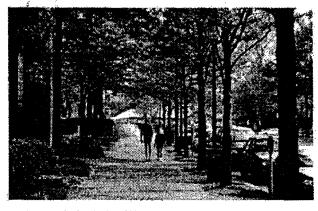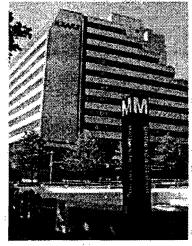
the workforce and find jobs.

Security and Safety
Vision: *Montgomery County will provide physical, financial,*
and technological protection and safety for older adults.
• The County will expand its police and fire safety programs targeted toward older adults.
• The County will educate both older adults and their caregivers about the potential
for financial crimes, including telephone and computer scams.
• The County's Ombudsman Program will increase its monitoring of the safety of
group homes and assisted living facilities.
• The County will work to assure legal protection from financial exploitation of older adults.

Presentation to the Montgomery County Commission on Aging

Gwen Wright
Director
Montgomery County
Planning Department

June 12, 2014

Activities of the Montgomery County Planning Department

- Plan, design and enhance communities throughout Montgomery County – rural, suburban, and urban

- Develop master plans for specific geographic areas, as well as functional plans that address Countywide issues

- Implement plan goals and visions through the review of regulatory cases. Goals of development review:
  - ➢ Efficiency (reasonable review times, understandable overall process)
  - ➢ Coordination (work with other agencies, development community, and the public to assure full analysis and streamline efforts)
  - ➢ High Quality Results (create livable, attractive, sustainable new buildings and communities)

33

Checklist of Essential Features of Age-friendly Cities

This checklist of essential age-friendly city features is based on the results of the WHO Global Age-Friendly Cities project consultation in 33 cities in 22 countries. The checklist is a tool for a city's self-assessment and a map for charting progress. More detailed checklists of age-friendly city features are to be found in the WHO Global Age-Friendly Cities Guide.

This checklist is intended to be used by individuals and groups interested in making their city more age-friendly. For the checklist to be effective, older people must be involved as full partners. In assessing a city's strengths and deficiencies, older people will describe how the checklist of features matches their own experience of the city's positive characteristics and barriers. They should play a role in suggesting changes and in implementing and monitoring improvements.

Outdoor spaces and buildings

☐ Public areas are clean and pleasant.

☐ Green spaces and outdoor seating are sufficient in number, well-maintained and safe.

☐ Pavements are well-maintained, free of obstructions and reserved for pedestrians.

☐ Pavements are non-slip, are wide enough for wheelchairs and have dropped curbs to road level.

☐ Pedestrian crossings are sufficient in number and safe for people with different levels and types of disability, with non-slip markings, visual and audio cues and adequate crossing times.

☐ Drivers give way to pedestrians at intersections and pedestrian crossings.

☐ Cycle paths are separate from pavements and other pedestrian walkways.

☐ Outdoor safety is promoted by good street lighting, police patrols and community education.

☐ Services are situated together and are accessible.

☐ Special customer service arrangements are provided, such as separate queues or service counters for older people.

☐ Buildings are well-signed outside and inside, with sufficient seating and toilets, accessible elevators, ramps, railings and stairs, and non-slip floors.

☐ Public toilets outdoors and indoors are sufficient in number, clean, well-maintained and accessible.

Transportation

☐ Public transportation costs are consistent, clearly displayed and affordable.

☐ Public transportation is reliable and frequent, including at night and on weekends and holidays.

☐ All city areas and services are accessible by public transport, with good connections and well-marked routes and vehicles.

□ Vehicles are clean, well-maintained, accessible, not overcrowded and have priority seating that is respected.

□ Specialized transportation is available for disabled people.

□ Drivers stop at designated stops and beside the curb to facilitate boarding and wait for passengers to be seated before driving off.

□ Transport stops and stations are conveniently located, accessible, safe, clean, well-lit and well-marked, with adequate seating and shelter.

□ Complete and accessible information is provided to users about routes, schedules and special needs facilities.

□ A voluntary transport service is available where public transportation is too limited.

□ Taxis are accessible and affordable, and drivers are courteous and helpful.

□ Roads are well-maintained, with covered drains and good lighting.

□ Traffic flow is well-regulated.

□ Roadways are free of obstructions that block drivers' vision.

□ Traffic signs and intersections are visible and well-placed.

□ Driver education and refresher courses are promoted for all drivers.

□ Parking and drop-off areas are safe, sufficient in number and conveniently located.

□ Priority parking and drop-off spots for people with special needs are available and respected.

Housing

□ Sufficient, affordable housing is available in areas that are safe and close to services and the rest of the community.

□ Sufficient and affordable home maintenance and support services are available.

□ Housing is well-constructed and provides safe and comfortable shelter from the weather.

□ Interior spaces and level surfaces allow freedom of movement in all rooms and passageways.

□ Home modification options and supplies are available and affordable, and providers understand the needs of older people.

□ Public and commercial rental housing is clean, well-maintained and safe.

□ Sufficient and affordable housing for frail and disabled older people, with appropriate services, is provided locally.

Social participation

□ Venues for events and activities are conveniently located, accessible, well-lit and easily reached by public transport.

□ Events are held at times convenient for older people.

□ Activities and events can be attended alone or with a companion.

□ Activities and attractions are affordable, with no hidden or additional participation costs.

□ Good information about activities and events is provided, including details about accessibility of facilities and transportation options for older people.

□ A wide variety of activities is offered to appeal to a diverse population of older people.

□ Gatherings including older people are held in various local community spots, such as recreation centres, schools, libraries, community centres and parks.

□ There is consistent outreach to include people at risk of social isolation.

Respect and social inclusion

□ Older people are regularly consulted by public, voluntary and commercial services on how to serve them better.

□ Services and products to suit varying needs and preferences are provided by public and commercial services.

□ Service staff are courteous and helpful.

□ Older people are visible in the media, and are depicted positively and without stereotyping.

□ Community-wide settings, activities and events attract all generations by accommodating age-specific needs and preferences.

□ Older people are specifically included in community activities for "families".

□ Schools provide opportunities to learn about ageing and older people, and involve older people in school activities.

□ Older people are recognized by the community for their past as well as their present contributions.

□ Older people who are less well-off have good access to public, voluntary and private services.

Civic participation and employment

□ A range of flexible options for older volunteers is available, with training, recognition, guidance and compensation for personal costs.

□ The qualities of older employees are well-promoted.

□ A range of flexible and appropriately paid opportunities for older people to work is promoted.

□ Discrimination on the basis of age alone is forbidden in the hiring, retention, promotion and training of employees.

□ Workplaces are adapted to meet the needs of disabled people.

□ Self-employment options for older people are promoted and supported.

□ Training in post-retirement options is provided for older workers.

□ Decision-making bodies in public, private and voluntary sectors encourage and facilitate membership of older people.

Communication and information

□ A basic, effective communication system reaches community residents of all ages.

□ Regular and widespread distribution of information is assured and a coordinated, centralized access is provided.

- [ ] Regular information and broadcasts of interest to older people are offered.

- [ ] Oral communication accessible to older people is promoted.

- [ ] People at risk of social isolation get one-to-one information from trusted individuals.

- [ ] Public and commercial services provide friendly, person-to-person service on request.

- [ ] Printed information – including official forms, television captions and text on visual displays – has large lettering and the main ideas are shown by clear headings and bold-face type.

- [ ] Print and spoken communication uses simple, familiar words in short, straightforward sentences.

- [ ] Telephone answering services give instructions slowly and clearly and tell callers how to repeat the message at any time.

- [ ] Electronic equipment, such as mobile telephones, radios, televisions, and bank and ticket machines, has large buttons and big lettering.

- [ ] There is wide public access to computers and the Internet, at no or minimal charge, in public places such as government offices, community centres and libraries.

Community and health services

- [ ] An adequate range of health and community support services is offered for promoting, maintaining and restoring health.

- [ ] Home care services include health and personal care and housekeeping.

- [ ] Health and social services are conveniently located and accessible by all means of transport.

- [ ] Residential care facilities and designated older people's housing are located close to services and the rest of the community.

- [ ] Health and community service facilities are safely constructed and fully accessible.

- [ ] Clear and accessible information is provided about health and social services for older people.

- [ ] Delivery of services is coordinated and administratively simple.

- [ ] All staff are respectful, helpful and trained to serve older people.

- [ ] Economic barriers impeding access to health and community support services are minimized.

- [ ] Voluntary services by people of all ages are encouraged and supported.

- [ ] There are sufficient and accessible burial sites.

- [ ] Community emergency planning takes into account the vulnerabilities and capacities of older people.

A. Wright, Gwen ON THE STRUCTURE OF THE PLANNING
DEPARTMENT

Chuck,

Sorry for the delayed response. We have approximately 144 staff in the Planning
Department. We are organized into 8 divisions.

Three are geographically based: Area 1 (inside the Beltway), Area 2 (along the I-
270 Corridor), and Area 3 (the rest of the County). Each of these three divisions
include staff who do both master planning and review of regulatory applications in the
specific geographic area.

Two are more administrative divisions that serve the whole Department:
Management Services and IT.

The remaining divisions are: Research and Special Projects (including staff who do
demographic research, housing, and economic analysis), Functional Planning and
Policy (including transportation, environmental, zoning, and historic preservation staff
who deal with Countywide issues), and Development and Regulatory Coordination
(who do intake and processing of regulatory applications and administration of forest
conservation issues.)

Staff within the Department have many different types of expertise -- planners, GIS
experts, transportation modelers, urban designers, architects, landscape architects,
economists, demographers, arborists, etc.

Folks - I appreciate your interest in these issues. My review of the WHO age friendly checklist suggests that their items are largely operational. In light of this fact, a focus on a complex planning and development process (not operational) already top heavy with multiple agency players, and already focused on inclusion of community participants, (a very large percentage of which are seniors) does not seem that productive. Actually, county efforts are currently focused on streamlining those processes, not broadening them. I would encourage you to focus on service delivery to seniors in the WHO checklist context.
Best,
Councilmember Nancy Floreen

Sent from my iPad

On Jul 27, 2014, at 7:44 PM, "Austin Heyman" <aheygemini@verizon.net> wrote:

Chuck... I believe it would be appropriate for the study group and finally the Commission itself to consider the relationship between the WHO age-friendly checklist and the Senior Agenda. I believe that the Commission is planning to focus on next steps to be taken regarding the agenda and it seems to me that the WHO list might be useful in that regard and also for each of the Sub-Cabinet workgroups.
Austin

WHO GLOBAL NETWORK OF AGE-FRIENDLY CITIES©

Global Age-friendly Cities: A Guide

Background

The Age-friendly Cities Programme is an international effort to help cities prepare for two global demographic trends: the rapid ageing of populations and increasing urbanization. The Programme targets the environmental, social and economic factors that influence the health and well-being of older adults.

In 2006, WHO brought together 33 cities in 22 countries for a project to help determine the key elements of the urban environment that support active and healthy ageing. The result was *The Global Age-friendly Cities Guide* (http://www.who.int/ageing/publications) which outlines a framework for assessing the "age-friendliness" of a city. A core aspect of this approach was to include older people as active participants in the process.

What is an Age-friendly city?

An Age-friendly city is an inclusive and accessible urban environment that promotes active ageing

The guide identifies eight domains of city life that might influence the health and quality of life of older people:

1. outdoor spaces and buildings;
2. transportation;
3. housing;
4. social participation;
5. respect and social inclusion;
6. civic participation and employment;
7. communication and information; and
8. community support and health services.

WHO Global Network of Age-friendly Cities©

To build on the widespread interest generated by this programme, WHO has established the WHO Global Network of Age-friendly Cities©. The Network will:

1. Link participating cities to WHO and to each other.
2. Facilitate the exchange of information and best practices.
3. Foster interventions that are appropriate, sustainable and cost-effective for improving the lives of older people.
4. Provide technical support and training.

Advantages of membership

- *Connection to a global network of ageing and civil society experts.*
- *Access to key information about the programme: latest news, best practices, events, results, challenges and new initiatives through the Age Friendly CitiesCommunity of Practice (www.who.int/ezcollab/afc_network).*
- *Provision of technical guidance and training throughout the AFC implementation process.*
- *Opportunities for partnerships with other cities.*

Network Membership

Cities participating in the Network commit to a cycle of continually assessing and improving their age-friendliness.

To join the Network, cities must:
- complete an application form available at www.who.int/ageing/age_friendly_cities/en/index.html
- submit a letter from the Mayor and municipal administration to WHO indicating their commitment to the Network cycle of continual improvement.
- commence a cycle of four stages:

1. Planning (Year 1-2): This stage includes four steps:

a. Establishment of mechanisms to involve older people throughout the Age-friendly City cycle.
b. A baseline assessment of the age-friendliness of the city.
c. Development of a 3-year city wide plan of action based on assessment findings.
d. Identification of indicators to monitor progress.

2. Implementation (Year 3-5)

On completion of stage 1, and no later than two years after joining the Network, cities will submit their action plan to WHO for review and endorsement. Upon endorsement by WHO, cities will then have a three-year period of implementation.

3. Progress evaluation (end of year 5)

At the end of the first period of implementation, cities will be required to submit a progress report to WHO outlining progress against indicators developed in stage 1.
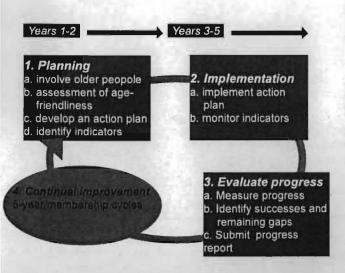
4. Continual improvement

If there is clear evidence of progress against the original action plan, cities will move into a phase of continual improvement. Cities will be invited to develop a new plan of action (duration of up to 5 years) along with associated indicators. Progress against this new plan will be measured at the end of this second implementation period. Cities will be able to continue their membership to the Network by entering into further implementation cycles.

Cycle of WHO Global Network of Age-friendly Cities©

Years 1-2 ⟶ **Years 3-5**

1. Planning
a. involve older peopole
b. assessment of age-friendliness
c. develop an action plan
d. identify indicators

2. Implementation
a. implement action plan
b. monitor indicators

3. Evaluate progress
a. Measure progress
b. Identify successes and remaining gaps
c. Submit progress report

4. Continual Improvement
5-year membership cycles

Questions and Answers

What is the role of WHO in the Network?
The role of WHO headquarters, Regional Offices and Country Offices includes:
1. Coordination of the Age-friendly Cities programme.
2. Identification and dissemination of best practices.
3. Development of implementation guidelines.
4. Technical support and training.
5. Reviewing progress and plans.

How do national programmes link to the Network?
Some Member States are taking the initiative to establish their own national or state-wide programmes. WHO is happy to work with these Member States to ensure that cities participating in these programmes gain automatic membership to the Network.

How does WHO take into account the differences between cities in determining membership and reviewing action plans?
The Network process is flexible and allows for the diversity of cities across the world. Assessment of action plans and progress will take into account the financial and social circumstances of each city and region.

How long does membership of the Network last?
A city can remain a member of the Network for as long as it demonstrate continual improvement against its developed indicators.

Will the establishment of the Network result in the development of benchmarks or standards for age-friendly cities?
The WHO Network does not yet set standards or benchmarks for performance. However, cities these measures are planned for the future, and cities will be assisted to identify indicators that can be used for comparison purposes.

What are the future plans for the Network?
A further and later step may be to identity standards that would allow cities to receive an award if they reach a particular level. WHO is also interested in exploring similar age-friendly approaches in different settings, for example rural communities, hospitals and workplaces.

What is an Age-friendly Cities community of practice?
It is a social online platform for:
- Sharing approaches
- Enhancing access to knowledge
- Linking experts
- Facilitating collaboration
- Promoting learning
- Strengthening partnerships

The Age-friendly Cities Community of Practice can be accessed at **www.who.int/ezcollab/afc_network**

Involving older people is an essential element of an age-friendly city. Their contributions are important for city assessments, setting priorities, proposing solutions for action, and monitoring progress.

World Health Organization

Ageing and Life Course (ALC)
Family and Community Health (FCH)
World Health Organization
Avenue Appia 20
CH-1211 Geneva 27, Switzerland
activeageing@who.int
www.who.int/ageing/en
Fax: + 41 (0) 22 791 4839

Action Plan for an Age-Friendly Portland

Prepared by:

The Age-Friendly Portland Advisory Council
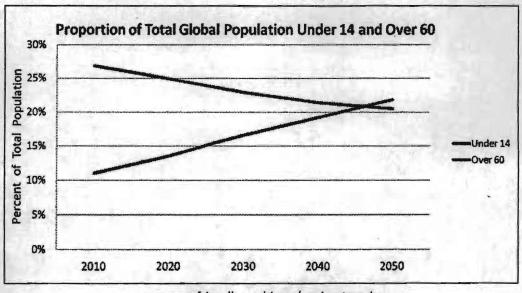
October 8, 2013

Goal

The goal of this Action Plan is to enhance Portland, Oregon's age friendliness. As defined by the World Health Organization (WHO),[1] an "age friendly" city:

- has structures and services that are accessible and inclusive of older people with varying needs and capacities
- emphasizes enablement rather than disablement, and
- is friendly for people of all ages and abilities

The action steps that comprise this plan are intended to move Portland toward future development and activities that foster not only physical environments but also social and service environments that meet these criteria, making Portland a community for all ages.

Why Is This Important?

The populations of Portland, the state of Oregon, the U.S., and the world are all growing older due to increasing life spansalong with rapidly declining birth rates. Before the year 2050, there will be more people over the age of 60 than under the age of 14. Population aging will shape local, regional, national and international economies and policymaking unlike any other demographic shift witnessed to date.[2]

Proportion of Total Global Population Under 14 and Over 60

www.agefriendlyworld.org/ageing-trends

In the Portland area, between 2010 and 2030, Metro[3] projects a growth of 106% in the number of those aged 65 and older compared to an increase of 34.6% in the region's population overall.

As shown in the table below, over the next two decades both the number and the proportion of older adults in the Portland metropolitan area are projected to increase at greater rates than in the state of Oregon or the U.S. as a whole. Portland is also expected to experience growing diversity among its aging residents.

Projected Population Growth in the U.S., Oregon, and Portland Area, 2010 to 2030[4]

Category	United States	Oregon	Portland-Vancouver MSA
Number of persons aged 65+ in 2010	40,267,984	533,533	251,000
Proportion of persons aged 65+ in 2010	13.0%	13.9%	11.1%
Number of persons aged 65+ in 2030	72,092,000	881,957	518,100
Proportion of persons aged 65+ in 2030	19.3%	18.2%	17.0%
Growth rate in number of persons aged 65+ from 2010 to 2030	79.0%	65.3%	106.4%
Growth rate in proportion of persons aged 65+ from 2010 to 2030	48.0%	31.0%	53.3%

Planning for our aging population is critically important to address both the opportunities and challenges of taking advantage of the resources, skills, and experience of older adults and fully including them in the civic, social, and economic fabric of the city.[5]

History of the Age-Friendly Portland Action Plan

In 2006, the Institute on Aging at Portland State University (PSU) began collaborating with the World Health Organization (WHO) in the WHO's Global Age-friendly Cities project. This entailed conducting research on Portland's age friendliness. Portland, the only U.S. city in the original WHO study, was one of 33 cities in 22 countries selected for this research that culminated in the WHO's Global Age-Friendly Cities Guide (2007).[6] Locally, the research was guided by community members representing public, nonprofit, and private stakeholders, including older adults themselves, and who comprised an Advisory Council for the project. The research led to the publication of a Final Report and Summary of Findings (2007)[7] that detailed Portland's age-friendly features, barriers, and suggestions for making the city a better place for people of all ages and abilities.

In 2010, the City of Portland partnered with the PSU Institute on Aging to apply for membership to the WHO's Global Network of Age-Friendly Cities[8], which was created to provide cities around the world with opportunities to collaborate to advance their cities' age friendliness. In June, 2010, Portland was one of the original nine cities accepted for membership in the Global Network. One year later the City Council officially accepted the WHO's certificate of membership into the Global Network.

Requirements for membership in the WHO Global Network of Age-friendly Cities include conducting a baseline assessment of the city's age friendliness (completed in Portland in 2007), developing an action plan for enhancing the city's age friendliness (the present document), implementing the plan, developing indicators of progress and then monitoring progress. Since completing the baseline research, the PSU Institute on Aging, in collaboration with the members of the Age-Friendly Portland Advisory Council, has conducted and consulted on further research concerning Portland's age-friendly features and barriers. PSU Institute on Aging staff also served on former Portland Mayor Sam Adams' Portland Plan Advisory Group and various committees charged with informing the development of the Portland Plan. The culmination of that work was a section (pages 24-25) within the Portland Plan titled "Portland is a Place for All Generations."[9] Several strategies and specific actions within the Portland Plan for achieving this aspirational goal were listed, including the creation of an age-friendly city action plan. The present document fulfills that charge.

Presentation of the Certificate of Membership in the WHO Global Network of Age-Friendly Cities to City Council, June 8, 2011. From left to right: Jerry Cohen, State Director, AARP Oregon; Vicki Hersen, Executive Director, Elders in Action; City of Portland Commissioner Randy Leonard; City of Portland Commissioner Amanda Fritz; Portland Mayor Sam Adams; Margaret Neal, Director, PSU Institute on Aging; Alan DeLaTorre, Project Manager, PSU Institute on Aging; City of Portland Commissioner Dan Saltzman; City of Portland Commissioner Nick Fish.

In 2012, the WHO began a partnership with the AARP national office to manage new age-friendly efforts in selected U.S. states, including Oregon, as a part of a pilot program. The AARP Oregon staff is working with the Age-Friendly Portland effort as well as with other age-friendly-related initiatives in the state.

Since the beginning of the WHO Age-Friendly Cities project in Portland, an Advisory Council composed of members from the public, private, nonprofit, and university sectors has guided the work. This model, unique among the WHO age-friendly efforts, has been characterized as the City-University-Community model. Although the Council's membership has changed over time, PSU faculty and staff from AARP Oregon, Elders in Action, and Multnomah County Aging and Disability Services have been involved from the outset. The Council has provided invaluable guidance, meeting regularly and providing input from a variety of stakeholder perspectives. (See the inside cover for the members and organizations represented on the 2013 Age-Friendly Portland Advisory Council and a photograph of members in attendance at the July 2013 meeting.)

How the Action Plan Was Developed

The Action Plan was developed by the members of the Age-Friendly Portland Advisory Council, with members representing a range of public and private organizations (see inside cover) coordinated by Drs. Margaret Neal and Alan DeLaTorre, Portland State University (PSU) Institute on Aging. The Action Plan was developed based on:

- A baseline assessment of Portland's age friendliness conducted as a part of the WHO Global Age-Friendly Cities project conducted in 2006-2007[10]
- Multnomah County's Task Force on Vital Aging report titled *Everyone Matters: A Practical Guide to Building a Community for All Ages* (2007)[11]
- Community forums held to discuss features and priorities related to Portland's age friendliness
- Findings from a PSU Master of Urban and Regional Planning student workshop project titled "Toward an Age-Friendly Portland"[12]
- The City of Portland's *Portland Plan* (2012), including the subsection "Portland is a Place for All Generations"[13]

Credit: Elders in Action

Ten domains of action are included in this Action Plan. They encompass both the physical and the social environment. These 10 domains are derived from the original eight domains of age friendliness identified by the World Health Organization, differing only in that two of the eight have been divided into two components each. (The WHO combines areas 5 and 6 into one domain, and areas 9 and 10 into another.)

1. Housing
2. Transportation
3. Outdoor spaces and buildings
4. Respect and social inclusion
5. Civic participation and volunteerism
6. Employment and the economy
7. Social participation

8. Communication and information
9. Community services
10. Health services

Woven within and across the domains are the importance of intergenerational linkages, considerations of safety and security as well as the promise of new technology. Action items are specified for each domain, as are potential partners for implementing them. As described in the "Next Steps" section at the end of the document, members of the Age-Friendly Portland Advisory Council will meet with these potential partner organizations to discuss the action items proposed, confirm organizations' willingness to collaborate, make refinements to action items as needed, identify an accountable organization for each item to facilitate implementation, and set timelines and indicators of progress.

The lists of potential partner organizations associated with the action items are not intended to be all-inclusive. Many more organizations and individuals are likely to participate. In particular, it is vitally important that older adults themselves be involved in decisions about actions and priorities. The philosophy of "nothing about them without them" is a central tenet of the WHO age-friendly cities initiative and of this Action Plan.

How the Action Plan Can Be Used

This Action Plan is intended an advocacy tool. It pulls together in one place a set of strategies intended to help Portland's City Council, City of Portland bureaus and Multnomah County departments, Metro, and local private and nonprofit sector organizations and individuals move our city and region toward development and activities that foster age-friendly physical, social, and service environments that are friendly for people of all ages and abilities.

This is an agenda for action. It will continue to evolve as new knowledge and understanding are gained and technological developments emerge. For reasons of practicality and usability, the Action Plan is not comprehensive. Rather, it is hoped that the action items suggested will lead organizations and individuals young, old, and in between to work together to implement not only these items but others as well that will contribute to creating a community that truly is a place for all ages.
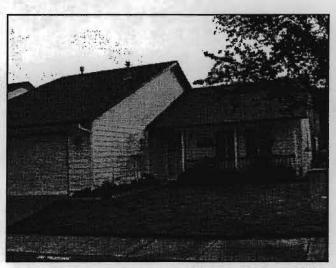
Action Area 1: Housing

Background: Housing is considered to be a universal human right.[14] Local research and planning activities suggest that in order to house our aging population and make Portland friendly to people of all ages and abilities, it is important to assure a full range of housing options that are planned and built to be accessible, affordable, healthy, secure, located near amenities and services, and to facilitate social interaction.

Action Item 1.1 – Provide Education to Consumers, Planners and Developers: Age-friendly housing must be better understood on both the supply and demand sides.

✓ Educate residents who are looking for housing and those who desire to stay in their existing homes about options and costs so that they can find the best fit with their current and, ideally, their future needs, whether they are looking for affordable or market-rate housing or they are seeking long-term care services and supports.

✓ Offer streamlined guidance to planners and developers regarding best practices for age-friendly housing and technical assistance for completing age- and ability-appropriate housing (e.g., zoning and building codes, resources for answering questions).

✓ Offer suggestions for home modifications to increase accessibility.

Potential Partners: AARP Oregon, PSU Institute on Aging, Portland Housing Bureau, Home Forward

Action Item 1.2 – Improve Accessibility: Policy efforts that lead to inclusive and accessible housing are critical for our city as we all continue to age.
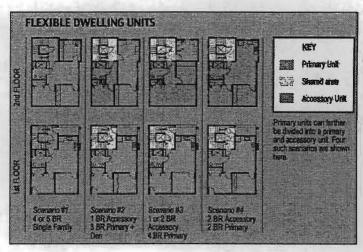

Credit: Douglas M. Adams

✓ Adopt policies, offer incentives and implement programs to enhance aspects of age-friendly policies and programs in the City's Comprehensive and Consolidated Plans.

✓ Review and strengthen policies that pertain to tax abatements, local and statewide structural code, fair housing, green building, urban renewal, visit ability (minimally, having at least one no-step entrance, interior doors providing 31.75 inches or more of unobstructed passage space, and a toilet on the main floor), and affordability to increase the availability of accessible housing for older adults.

Potential Partners: Portland Bureaus of Housing, Planning and Sustainability, Transportation, and Development Services

Action Item 1.3 – Encourage Innovative Approaches to Housing Older Adults: Because of Portland's reputation as a leader in urban planning and smart growth, the city has a unique opportunity to advance the planning and development of sustainable housing and communities for residents of all ages.

✓ Encourage demonstration projects, design competitions (the image included is an example of "lifelong design" in a courtyard housing model developed for a Portland competition), innovative approaches to shared housing (e.g., accessible accessory dwelling units, shared single-family homes), and intergenerational 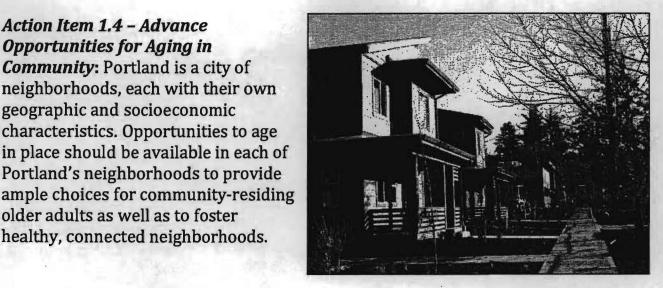housing and all-age communities. Bridge Meadows (see next page) is an award-winning example of intergenerational living which makes use of the wisdom and experience of older adults in mentoring foster families.

Credit: City of Portland

Potential Partners: AARP Oregon, PSU Institute on Aging, Portland Bureau of Planning and Sustainability

Action Item 1.4 – Advance Opportunities for Aging in Community: Portland is a city of neighborhoods, each with their own geographic and socioeconomic characteristics. Opportunities to age in place should be available in each of Portland's neighborhoods to provide ample choices for community-residing older adults as well as to foster healthy, connected neighborhoods.

✓ Review and strengthen City code that regulates development practices in order to remove obstacles to co-housing and other housing models that meet the needs of older adults who want to continue to live independently in their neighborhoods.

✓ Foster the creation of private and public outdoor spaces for social interactions in and near housing developments, particularly in East Portland and other parts of the city that are park deficient.

✓ Work to prevent the negative effects of gentrification on vulnerable older adults (and their supportive networks) in Portland neighborhoods, which have resulted in part from increased housing values and development strategies such as urban renewal, capital projects.

✓ Take advantage of existing and emergent technologies to assist people to age in place at home, such as unobtrusive monitoring of activity to identify changes in health, digital technologies that help people stay in touch with family and friends, and other assistive technologies.

Potential Partners: Portland Bureaus of Housing, Planning and Sustainability, Transportation, and Development Services, Oregon Center for Aging and Technology (ORCATECH) Council members, including OHSU, Intel, PSU

Age-Friendly ★★★ ≡DC

Goals and Objectives for the Ten Domains of an Age-Friendly DC by 2017

07-12-14 Draft

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Domain #3: Housing - wide range of housing options for older residents, aging in place, and other home modification programs.

Vision: As the senior population of DC continues to grow, the City will ensure that a continuum of living options exists, including the option to age in place, and that the necessary services are in place to support these options.

Goal 1: Support aging in place.

Objective 1.1: Support the DC Department of Health Care Financing in implementing the necessary steps to start PACE within the targeted timeline, i.e. the application, submission, and approval of a state plan amendment and the creation of a Request for Application/Request for Proposal by DC and the selection of a provider in response to the requests. Implement the Program of All-Inclusive Care for the Elderly (PACE) upon Federal approval.

Objective 1.2: Act on the recommendations listed below of the Single Family Residential Rehabilitation Program and Handicapped Accessibility Improvement Program Task Force, which includes representatives from DHCD, DCHF, AARP-DC, DC Free Falls Coalition, DCOA, and Legal Counsel for the Elderly.

Objective 1.3: Eliminate the need for renters to apply to Handicapped Accessibility Improvement Program (HAIP) program for environmental adaptation

Objective 1.4: Eliminate the need for renters in need of environmental adaptations to move through the HAIP eligibility process.

Objective 1.5: Include occupational therapy (OT) home assessment for accessibility requests

Objective 1.6: Create an expedited, capped program to address immediate accessibility/safety needs. For example, modifications up to $7,500 would be eligible.

Objective 1.7: Housing (four units or less) that is using District funds to address code remediation or other rehab should be assessed for accessibility needs to facilitate aging in place.

Objective 1.8: Expand the Single Family Residential Rehabilitation Program to include funding for reasonable modifications for seniors with a disability in rental properties. This recommendation would provide funding for such structural changes in properties without Federal assistance. In addition to providing funding for reasonable modifications for seniors with a disability, funding could also be made available for modest modifications for seniors who did not meet the applicable disability definition.[1]

Objective 1.9: Implement changes to DC Zoning Law recommended by the Office of Planning in their September 2012 draft zoning revisions that would permit accessory dwelling units (ADUs, or "granny flats") by right in most residential zones, with certain restrictions.

Objective 1.10: Explore home-sharing as a strategy for enabling older adults who are physically, mentally and emotionally capable of maintaining their residency in a safe and mutually beneficial partnership.

Goal 2: Improve access to and availability of assisted living, supportive and affordable housing options.

Objective 2.1: Encourage preservation and improvement of existing, affordable senior housing proximate to mass transit (bus or metro).

Objective 2.2: Consider using Housing Production Trust Funds to produce new affordable, transit-oriented, universally designed units that are welcoming to all seniors and supportive of special needs populations.

Objective 2.3: Ensure consistent enforcement of the Fair Housing Act. Review impediments and recommendations included in the District of Columbia Analysis of Impediments to Fair Housing Choice 2006-2011, paying particular attention to Impediments 6, 8, and 9 and the associated recommendations. (Impediment 6 relates to accessory dwelling units; impediment 8 relates to ensuring the planning process complies with the Fair Housing Act and Americans with Disabilities Act; Impediment 9 addresses community-based residential facilities.)

Objective 2.4: Amend Medicaid waiver and/or State Plan to promote real assisted living options for low income seniors and promulgate more realistic Medicaid reimbursement rates that are high enough to attract investment and flexible enough to provide for seniors with greater ADL needs.

Objective 2.5: Devote more units to assisted living.

Objective 2.6: Investigate opportunities to use "Pay for Success" partnerships, such as the assisted living model being pursued by Ohio-based National Church Residences, to take on the financial risk of expanding permanent housing and assisted living, as described above.

Objective 2.7: Champion and advance a revised version of the visitability bill that was developed in consultation with developer and advocate communities that requires first floor bathrooms, 31.75 inch doorways, zero step entryways, and accessible controls and is on par with neighboring jurisdictions' visitability requirements and incentives.

Objective 2.8: In those projects where inclusionary zoning goals apply, 5% of the set asides should be suitable for households where at least one member is 60 years of age or older and the household's income is at or below the appropriate thresholds.

Objective 2.9: Recognizing that older LGBTQ residents still face unwelcoming environments in age-friendly housing settings, ensure that a range of safe, welcoming housing options exist for LGBTQ residents across the continuum of housing needs for aging populations.

> Objective 2.9.1: Recognizing that older LGBTQ residents still face unwelcoming environments in age-friendly housing settings, ensure that a range of safe, welcoming housing options exist for LGBTQ residents across the continuum of housing needs for aging populations.
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> Objective 2.9.2: Encourage development of new group (congregate) or other age-friendly housing projects that are committed to welcoming and including LGTBQ seniors and work with operators of existing housing to create more welcoming environments.

Goal 3: Maximize awareness and utilization of age friendly housing opportunities through education

Objective 3.1: Charge a position or office with responsibility for the above function, and ensure this entity is adequately resourced and empowered. Consider direct reporting lines to the Deputy Mayors of Health and Human Services and Planning and Economic Development. This entity could lead or support many of the recommended actions below.

Objective 3.2: Ensure greater awareness and increase utilization of programs and tax expenditures available to seniors

Objective 3.3: Increase awareness of changes to the Property Tax Credit made in 2014 and its applicability to and utilization by renters.

Objective 3.4: Require housing-related agencies to conduct affirmative marketing of affordable, safe, and welcoming housing options to LGBTQ seniors and other groups as needed.

Objective 3.5: Provide training for managers of existing publicly-owned and private projects (including those tenant-owned projects) in resources available and best practice strategies for dealing with needs of aging residents, including LGTBQ cultural competency training.

Objective 3.6: Utilize home inspectors and HUD certified housing counselors to train older adults on how to avoid and prevent home repair scams from unscrupulous contractors.

Objective 3.7: Require continuing education on aging in place, and universal design for architects and designers working in related areas.

Objective 3.8: Stimulate increased use of volunteering, possibly using tools such as timebanks and service learning programs, to improve services available to older adults to support aging in place and address issues affecting all ages.

Objective 3.9: Use an intergenerational lens to review existing timebank activities in DC and insert intergenerational language to encourage time exchanges across generations.

Objective 3.10: Build partnerships with local universities and professional associations to leverage pro bono design services and support that encourage universal design and aging in place. Consider the following possible opportunities: facilitate design competitions with students and/or professionals, create a fellowship program that pairs students with community based organizations, and generate research that informs design and production of age-friendly housing.