

PROJECT 2015

Shaping Public Policy

Preparing for Demographic Change



NEW YORK STATE AGENCIES: STATUS REPORT 2005

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*Individual Project 2015 Status Reports for 2005 from the participating
New York State Government Agencies are available upon request.*

ACKNOWLEDGEMENTS

This *Project 2015 Status Report* for 2005 marks the third year since New York State launched its comprehensive initiative to prepare New York state government agencies for the future impact of major demographic change. Through Project 2015, the participating agencies have gained an understanding of the major demographic forces that will shape New York State during the years to come. The state agencies deliberated the impact of those major demographic changes on individual agencies' policies, programs and products; they identified strategies, action steps, and collaborations to assure that their agencies would be prepared to meet the impact of our State's dramatically shifting population profile.

In the years since the initial strategic planning took place, agencies participating in the Project 2015 initiative have successfully used their planning document (agency brief) as the basis for adopting new approaches to better serve our aging, more diverse population. This *Project 2015 Status Report for 2005* includes tangible results that state agencies identified as being attributable to their Project 2015 planning, within six domains of change: (1) internal organizational changes; (2) new laws, acts and programs; (3) advocacy, education and outreach to the public; (4) new or modified Webs sites and products; (5) new coalitions and collaborations that state agencies have engaged in as a result of the Project 2015 planning work initiated in 2002; and (6) new funding. The New York State Office for the Aging would like to thank the state agencies for their participation and responses to the Status Report survey to collect information about their Project 2015-related agency activities that took place during 2005.

Additional information about Project 2015 is available at the following Web site:
<http://www.aging.state.ny.us/explore/project2015/index.htm>.

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**PROJECT 2015 –
Introduction**

The first wave of Baby Boomers turns 60 years old during 2006. This watershed event has been the subject of increasing discussion over the past several years, and media attention has made us all aware of the “graying” of society. Yet, we, as a country, have been slow to take the next steps and examine what our aging population will mean to society and what planning must occur to prepare for the impact of major demographic change.

In New York State, the impacts of the aging of the Baby Boom population into the elder cohort – together with population diversity – have been an area of focused attention in state government, through the Project 2015 initiative.

New York State recognized that its population profile was beginning to shift dramatically, and these trends were expected to continue for much of this century. Before the Project 2015 initiative, state government was not well-prepared for the impact this would have on existing policies, programs, and products, particularly as they affect our ability to support vital communities in which New York’s

residents can live, grow, work and age well.

Project 2015 was established as a strategic planning model designed to take multiple, diverse agencies through a structured process to analyze and understand the impact of demographic change and, through action steps, prepare to meet the challenges and take advantage of the opportunities presenting themselves to governments, organizations and communities.

The Project 2015 initiative has provided a process of planning, engagement and action by 36 participating New York State government agencies to prepare for the impact of the aging and increasing diversity of our state’s population.

This *Project 2015 Status Report for 2005* describes the history of the Project 2015 initiative, its current status, and action steps and developments that New York State government agencies have undertaken during 2005 as they prepare for the impact of an aging, more diverse population through this initiative.

**Demographic
 Change
 –
 A Driving Force**

New York State’s population profile is shifting significantly due to several major demographic trends: (1) the aging of the State’s population, due to increasing longevity among the State’s already large number of elderly people, as well as the impending passage of the large Baby Boom generation into the elder cohort,

Aging – Baby Boomers	
2024—All Boomers in Elder Cohort	
<u>Oldest Boomers</u>	<u>Youngest Boomers</u>
2006 – age 60	2024 – age 60
2031 – age 85	2049 – age 85

and (2) the increasing diversity of the state’s population because of New York’s very strong immigration and migration patterns, growth in the number and types of minority subgroups, and increasing longevity among various ethnic and special needs populations.

Population Change by Race/Ethnicity in NYS			
	1990	2000	Change
All groups	17,990,455	18,976,457	5.5%
White	12,460,189	11,760,981	- 5.6%
Black	2,569,126	2,945,427	14.6%
Hispanic	2,214,026	2,867,583	29.5%
Asian	693,760	1,191,050	71.7%

These evolving trends will result in dramatic changes in the characteristics and needs of the State’s population, and these changes will have an impact on the policies, constituency make-up, programs, services, products and practices within our state.

For example, workforce, caregiver, language, and dependency ratio issues; health, long term care, housing and transportation issues; service, program, and product design issues; opportunities for volunteers, intergenerational support, and technology; reliance upon preventive health care, nutrition, and wellness approaches to well-being; preferences for second careers and continued working during the retirement years will be affected by our changing population profile.

New York State recognized that the State's changing profile would have a significant, interactive impact across the State— creating both challenges and opportunities for individuals of all ages, for all population groups, and across all community sectors. The major elements of demographic change that were identified, and examples of the issue areas that would 'feel' a significant impact from these changes, included:

Aging and Longevity: New York has the third largest population of elders in the nation. Due to the aging of the Baby Boomers and continuing increases in longevity, the State will experience increasing numbers of older people and growing numbers of elderly people with frailties. It was recognized that these increases would require state government to rethink how to more effectively and cost-efficiently deliver services and products across all sectors (transportation, health, long-term care, housing, recreation, mental health, the financial sector, the prison system, the business community, etc.).

In addition, state government agencies were not familiar with the characteristics of the aging Baby Boom generation that distinguish it from our traditional conceptions of the elderly population. Greater understanding of the increased health, education, financial status, technological sophistication, and worldliness of the Boomers, as compared to previous elderly

cohorts, was needed to help policy makers and program developers respond appropriately to this new elder-cohort picture and, in creative ways, build upon the skills, knowledge, strengths, and assets inherent in the growing older population.

Shift Among the Generations: As the elderly population increases in New York State, it was recognized that there would be a substantial shift in the proportional balance between the elderly and non-elderly populations (a growing proportion of older people relative to a declining proportion of non-elderly people). State agencies identified the economic and social impacts of this shift and considered how to effectively respond to changes in dependency ratios, availability of caregivers, workforce gaps, attitudes about older workers, attitudes of older people regarding civic engagement responsibilities, education issues, local budget issues, resource allocation among different age groups, interdependence among the various age groups, and others.

Community Diversity: In addition to the aging of the Baby Boom population, several additional strong demographic trends were identified that would significantly increase the diverse nature of our State's population: robust immigration and migration patterns, increasing disability rates, dramatic growth in racial and ethnic groups, and rapid

increases in non-traditional family/household structures. The services and work of many sectors would be affected by the changing make-up of our residents, including the health care system, the faith community, the education sector, the services sector, the business community, etc.; in addition, many issue areas that have an impact on the daily lives of the State's residents would be affected, including the health care work force, economic development, the political environment, relationships among resident groups and community-building efforts across population groups, disaster preparedness, appropriateness of living environments, environmental and consumer protections, civil rights, and many others.

Optimal fit: It was recognized that the dynamics of population change would require state agencies to adopt a working approach to *appropriately* meet the needs and preferences of the state's citizens and to build upon the opportunities resulting from anticipated demographic changes.

New York recognized the need to prepare government agencies for these demographic changes to assure an optimal fit between the goods and services provided by government agencies . . . and the citizens who use those goods and services. Project 2015 was created to enable state government agencies to plan and prepare to effectively achieve this optimal fit.



1998
–
Raising Awareness

In a 1998 planning meeting held by the State Society on Aging of New York State (SSA) and the New York State Office for the Aging (NYSOFA), Dr. Joanna Mellor, Past President of SSA, and Dr. Patricia Pine, Past Director of NYSOFA, convened a group that identified the need to focus on the impact of New York State's aging population and, particularly, on the looming progression of the large Baby Boom population into the elder cohort.

"As we look to the future of our state, it will take the effort of many people to help prepare our communities to be vital places for all residents to live, work and grow old." Dr. Patricia P. Pine, former director of the New York State Office for the Aging.

From this meeting, a joint initiative was instituted by SSA and NYSOFA, which resulted in the development of the publication, *Project 2015: The Future of Aging in New York State: Articles and Briefs for Discussion*, which was produced by the New York State Office for the Aging in 2000 and widely distributed.

This publication includes 24 articles and briefs written by over 40 professionals in the field of aging who discussed the future impact of an aging population in a wide variety of topic areas such as health, mental health, housing, informal caregiving, role transitions, legal services, trauma and aging, transportation, and other quality-of-life issues.

Following distribution, the publication formed the basis for discussions in community forums that were conducted across New York State in 2001 by NYSOFA and SSA to discuss the topics presented in the Project 2015 articles and briefs.



The interest created around the impact of the State's changing age profile prompted a discussion among NYSOFA, the Governor's office and state agencies regarding a planning process to prepare state government for significant demographic profile changes anticipated through the coming years.

In 2002, the Governor designated NYSOFA as the lead agency to design a government-wide policy

and planning initiative, convene 36 cabinet-level state agencies to participate in the initiative, and manage the overall project. Initial activities (1998-2001) in the Project 2015 effort focused on the impact of the aging of New York's population. In 2002, the areas for analysis for the Project 2015 planning process were expanded beyond the impact of the aging of New York's population to include the impact of several major demographic trends in addition to aging (immigration, migration, ethnic and racial diversity, changing family structure and disability), which have been incorporated into the ongoing activities of the project.

This wider umbrella more accurately portrays the State's dramatically shifting population profile, and each of the major demographic elements will have a profound individual, as well as interactive, impact on how the state agencies meet their future obligations. The issues to be addressed were stated in specific terms, and were common to all participating agencies. This promoted unity of purpose, provided a shared basis for collective discussion among the agencies, and resulted in a collection of agency Briefs that formed a cohesive, clear policy document for practical use.

The design of Project 2015 was intended to address two specific challenges to state government: (1) Demographic change as a common issue: Significant

population changes facing the State, and the direct impact of these changes, was a common issue affecting all state agencies, and all state agencies needed to *purposefully* prepare for the future impact of the anticipated changes.

(2) Cross-Agency Communication and Common Language for Discussion:

The discrete structure, functions, missions, and work of the 36 agencies underlay their traditional operating approach to meeting individual agency mandates. New York needed to create a unifying, government-wide approach for preparing for the impact of demographic change, an issue common to all agencies, and to tackle the challenges of this issue as a cohesive, interactive, collaborative body.

The purpose of Project 2015 is to create a process to prepare for the future, and to do this by: bringing attention to the increasing diversity and overall aging of our population and raising awareness of the issues of major demographic change; and initiating a mode of planning that will consistently respond, across disciplines and across areas of responsibility, to the evolving impact of our changing population on our policies, programs and products.

In 2002, the leaders and key decision-makers of 36 cabinet-level New York state government agencies were convened and, as a cohesive entity, guided through a future-based, highly structured nine-month planning initiative to prepare state government for the dramatic impact of the aging and

increasing diversity of the State's population. The 36 state agencies also established a workgroup with representation from senior staff of the agencies.

PROJECT 2015 – New York State 36 Participating State Agencies:
Advocate for Persons with Disabilities
Aging
Agriculture and Markets
Alcoholism and Substance Abuse Services
Banking Department
Budget
Council on Children and Families
Office of Children and Family Services
Civil Service
Consumer Protection Board
Correctional Services
Education
Empire State Development
Employee Relations
Environmental Conservation
General Services
Health
Housing and Community Services
Insurance
Labor
Mental Health
Mental Retardation and Developmental Disabilities
Motor Vehicles
Parks, Recreation and Historic Preservation
Public Service Commission
Quality of Care for the Mentally Disabled Commission
Real Property Services
State Emergency Management Office
State Police
State University of New York
Department of State
Taxation and Finance
Technology
Temporary and Disability Assistance
Transportation
Veterans' Affairs

Each state agency (1) *analyzed the impact* of projected demographic changes on their mission, policies, products and services, constituent make-up, and day-to-day work; (2) *prioritized the issue areas* emerging from the analysis; (3) *identified action steps*, strategies, and creative collaborations each would take to address these issue areas; (4) *articulated the outcomes* expected from these actions; and (5) following the nine-month process, the agencies *continue to implement their action steps* and to integrate the Project 2015 planning approach into their daily routines.

The Governor's Office of Employee Relations and Office of Parks, Recreation and Historic Preservation provided valuable assistance in facilitation, as well as workgroup and meeting organization, and the Empire State Development State Data Center contributed significant demographic data projections to assist the agencies in their deliberations and planning. Additional participating agencies provided critical services to the project, including covering the costs of meeting space, printing Braille transcriptions of all documents, and conducting a project documentation process.

Project 2015 – White Paper for Discussion

Each New York state agency participating in the initiative wrote an agency-specific Brief identifying

their priority issue areas and action steps to be considered by their agency to better meet the challenges and capitalize on the opportunities presented by these population changes in New York. The first major product of the 2002 state government initiative was a policy document, *Project 2015: State Agencies Prepare for the Impact of an Aging New York: White Paper for Discussion (2002)* (hereafter referred to as the White Paper). The Briefs can be considered both individually and collectively as a compendium of issues important in the state.

In the analysis and summary of the agencies' 36 briefs included in the White Paper, it was found that, through their participation in the activities of Project 2015, an unanticipated consensus had arisen among the agencies in identifying the initiative's ultimate goal: to create an optimal fit between the goods and services provided by New York State government agencies and the needs and preferences of the people being served by those agencies. As we learned from an analysis of the Project 2015 initiative, multi-group planning, in concert, around a unifying common issue, and in a cohesive, organized manner: (1) established a common bond among the participating groups, (2) had groups working toward a common goal, (3) encouraged sharing and collaborating among groups that had not occurred before, (4) produced ideas and strategies that would make the most out of the

opportunities presented by the changing demographics, and (5) promoted creativity in identifying effective ways of meeting the challenges inherent in changing demographics.

The results of the initial work continue to have significant implications, and the White Paper is being used as a basis for further, ongoing discussion and action steps by policy makers, citizens and groups across the State.

Guide to New York State Government's Planning Initiative

During the 2002 planning year by New York State government agencies, the *process* of designing and implementing Project 2015 and the *perceptions* of the agencies' leaders and staff who participated in the project were documented in a joint effort by the New York State Office for the Aging and the University at Albany's Center for Excellence in Aging Services. Several methods were used by the Center to collect information about the Project 2015 process and product development being used in the initiative: (1) in-depth interviews and focus groups of selected agency leaders and key state government agency staff who participated in Project 2015; (2) in-depth interviews of NYSOFA's agency leaders and members of the Project 2015 Management Team; (3) a personal interview with the Governor's oversight staff to Project 2015; (4) observation at several of the regularly scheduled

Project 2015 interagency work group meetings; and (5) observation at the day-long Governor's Project 2015 Symposium, which took place at the conclusion of the Brief development process.

This information was used to develop a publication that NYSOFA released in 2003, *Project 2015: State Agencies Prepare for the Impact of an Aging New York – Guide to New York State Government's Planning Initiative (2003)* (hereafter referred to as the Project 2015 Guide), which describes the framework of Project 2015. It is being used and adapted by other states and by community leaders who are seeking to engage in a multi-agency or community-wide planning process around a common issue. The Project 2015 Guide provides information about the overall design, management, and implementation of Project 2015; it includes the perceptions of the participating agencies' leaders and staff about the initiative; and it includes the key elements of the Project 2015 initiative that have made it an ongoing success.



Several aspects of Project 2015 distinguish it from traditional forms

of planning by government agencies; these aspects maximized its potential for systemic integration and sustainability:

Cohesive planning among distinct partners: The Project 2015 model is specifically designed to successfully *bring together entities* that traditionally do not act in concert, forming a cohesive group for deliberation and action planning. The model results in an on-going, systems-change approach to shaping public policy.

Future-oriented analysis and planning: In Project 2015, analysis of the implications of demographic change and action planning for these changes are based upon demographic *projections to the year 2015*, in place of traditional planning efforts that are based on present or past demographics.

Going beyond “aging”: Other state governments have looked at the impact of the aging of the Baby Boom, specifically focusing on major aging-related issues such as long-term care.

In Project 2015, New York’s state agencies looked at “aging” as it is occurring within a broader context of *overall dynamic population change*. It was determined that there was an interactive impact among the three aspects of aging and five aspects of diversity . . . that it was simply too limiting to look only at “aging.” Older people do not exist in a vacuum; what

happens to one age group or one sector or one population segment has a direct impact on what happens to the others and is directly linked to well-being of all ages, groups, and sectors.

2005 New York State Workforce Champion award: Project 2015

In 2005, Project 2015 was honored to receive the 2005 New York State Workforce Champion award. The award recognized the Project 2015 multi-agency team, convened by the New York State Office for the Aging (NYSOFA), and which guided 36 New York State government agencies during the project year. The team was recognized as an excellent example of interagency collaboration and for the demonstration of innovative and outstanding accomplishments by a multi-agency group to carry out the project's activities.



Overview

New York State continues to expand and develop Project 2015 planning and action steps at the state, local and national levels. Project 2015 publications are being used by government agencies and local communities for their work in preparing for the impact of

demographic change. The Project 2015 materials are being used in a variety of venues – including conferences, university classrooms, community forums, various media, and professional training sessions – to educate and to stimulate discussion about the State’s changing demographics and the implications of these changes.

Project 2015 – New York State

Project 2015’s highly structured planning process was successfully completed within the pre-determined nine-month time frame by New York State government agencies in 2002. Since then, the annual State Agency Status Reports have described how the participating agencies have been moving forward in implementing action steps, strategies, and non-traditional collaborations specified in their Project 2015 planning briefs.

In its continuing role as manager and coordinator for New York State’s Project 2015 initiative, NYSOFA is tracking the progress of activities and collaborations among New York State government agencies, whose Project 2015 activities continue to expand and evolve.

In early 2006, NYSOFA conducted the third annual Status Report survey to gather information from individual state agencies about activities and developments that the agencies have been engaging in as a result of Project 2015. The

Status Report survey asked the participating state agencies to describe initiatives that directly resulted from their Project 2015 participation during 2005. The survey responses form the basis for the “2005 – Tangible Results” section of this Status Report (see pp. 12-19).

Project 2015 – Community Level

In 2003, the Project 2015 initiative grew to include a community-based component. NYSOFA held a series of regional summit meetings across New York in the Fall 2003, in partnership with host agencies (Clinton County Office for the Aging; Onondaga Department for Aging and Youth, Finger Lakes Geriatric Education Center, and Westchester County Department of Senior Services), and the New York State Association of Area Agencies on Aging. Over 150 participants from area agencies on aging, representing 46 counties, participated in the five regional summit meetings.

NYSOFA also formed a partnership with the New York State Association of Area Agencies on Aging and the New York State Coalition for the Aging to create a tool kit of materials for use by the AAAs -- *Project 2015: Tool Kit for Community Action (NYSOFA, 2003)*.

NYSOFA then trained the State’s 59 Area Agencies on Aging (AAAs) on the Project 2015 strategic

planning process and uses for the Project 2015 community Tool Kit in educating and engaging community leaders, decision-makers, and citizens about the implications of dynamic population change and also in implementing a community-based planning process for preparing local organizations and governments for the impact of these changes. NYSOFA continues to provide AAAs with ongoing technical assistance as they implement Project 2015 planning and action steps within their counties.

Project 2015 – National Initiative

The success of Project 2015 has garnered attention from other states. New York's communities are not alone in experiencing profound shifts in the make-up of their resident populations -- the populations of communities and states across the country are aging, and are becoming increasingly diverse. Immigration patterns in the United States, including the in-migration of people from foreign countries and movement of these populations between states, have dramatically increased the diversity of many states' populations.

These shifts in states' demographic profiles present opportunities (skills, talents, a pool of new workers, etc.) and challenges (fewer caregivers, educational needs, communication gaps, etc.).

New York has made a commitment to share information across the country so that other states and organizations may replicate or adapt New York's planning approach to preparing for significant demographic change. On a regular basis, the Director of the New York State Office for the Aging and two members of the Project 2015 Management Team are training others across the country on the Project 2015 process and its outcomes in New York—at national conferences and at professional meetings. To date, New York has shared information and conducted training about its Project 2015 initiative in local, state and national presentations, including the National Governors' Association Health Policy Advisors (2003), the American Society on Aging/ National Council on Aging's annual conference (2003, 2004, 2005), the Southern Governors' Association conference (2004), the Quality Health Care for Culturally Diverse Populations Conference (2004), the State Society on Aging of New York conference (2002, 2003, 2004 and 2005), and the New York State Aging Concerns Unite Us conference (2002, 2003, 2004).

Several other states have been in contact with New York to look into how they may use or adapt New York's model as they conduct their own state activities to prepare for the impact of population change. These states include Arizona, Kentucky, Missouri, Nebraska (AAA), Pennsylvania, Tennessee,

Texas, Utah, Vermont, Washington (AAA) and West Virginia.

At the Governor's direction, NYSOFA convened a collaborative of diverse national organizations to serve as a vehicle to bring the Project 2015 model to scale for future-based planning around social and demographic change. National organizations were identified, contacted, and their agreement received to participate as members or as an affiliate of a National Collaborative, which will be used as a mechanism for implementing the Project 2015 National Initiative. The New York State Office for the Aging designated two members of the original Project 2015 management team as Project 2015 Principals, with responsibility for designing a framework for taking Project 2015 to national scale.

The Project 2015 National Initiative consists of three major components: (1) training state governments across the country in replicating/adapting New York's approach to preparing for the impact of dynamic population change, together with the provision of technical assistance in seeing them through the structured planning process, (2) training communities across the country in Project 2015's inclusive approach to bringing disparate sectors together for the purpose of future-based planning around demographic change; and (3) educate organizations and the

general public about the value of preparing for major demographic change.



The Project 2015 initiative has been extremely valuable to New York state government agencies, and the planning initiative has resulted in tangible outcomes within New York State government. These outcomes include changes within state agencies, changing practices in interacting with the public, and the introduction and/or modification of laws, policies, programs and products.

The range and scope of the initiatives that have resulted from the Project 2015 program during 2005 are presented within six domains in this Report:

- (1) Internal organizational changes;
- (2) New laws, acts and programs;
- (3) Advocacy, education and outreach to the public;
- (4) New or modified Webs sites and products;
- (5) New coalitions and collaborations, and
- (6) New funding.

These initiatives were identified by state agencies participating in Project 2015, in response to the

Project 2015 Status Update survey
of February, 2006.

1. Internal Organizational Changes

The **Department of Insurance** has established dedicated staff to handle senior issues, focusing on the products purchased by seniors, such as Medicare Supplement insurance, long-term care insurance, and Medicare Part D.

The **Commission on Quality of Care and Advocacy for Persons with Disabilities**: In 2005, the Commission on Quality of Care for the Mentally Disabled merged with Office of Advocate for Persons with Disabilities--- to create a new state agency: New York State Commission on Quality of Care and Advocacy for Persons with Disabilities. This merger allowed consolidation of functions and combining the expertise of both agencies' staff. One result was that the agency workforce is more culturally diverse and disability-diverse, and better equipped to respond to the needs of diverse New Yorkers.



2. New Laws / Acts / Programs

Geriatric Mental Health Act – 2005: In 2006, the **Office of Mental Health's** Commissioner

and the Director of the **Office for the Aging** will co-chair the newly created Geriatric Mental Health Planning Council. The Council will work to develop strategies to improve care and treatment of older adults with co-morbid health and mental health conditions and establish program demonstrations for geriatric mental health services. The demonstration programs, developed in response to the 2005 Geriatric Mental Health Act and 2006-2007 Budget, will be administered by the Office of Mental Health in cooperation with the State Office for the Aging.

Department of Health – Healthcare Efficiency and Affordability Law for New Yorkers (HEAL-NY): This 2005 law supports the restructuring of the acute care and long term care systems, including the development of new models of institutional and community-based care. Part of the restructuring of the long term care sector includes the establishment of a new Point of Entry assessment and management approach for long term care clients, as well as services to older adults in less restrictive settings appropriate to their individual needs.

Department of Environmental Conservation's Universal Access Program: Through this program, the New York State Department of Environmental Conservation now has 140 accessibility projects completed on state lands across the state. This

provides opportunities for outdoor recreation to our aging population and people of all ages with disabilities.

Department of Insurance Long Term Care Insurance

Campaign: The Department of Insurance launched a long-term care insurance education and awareness state-wide campaign, highlighting the need for New Yorkers to understand long-term care insurance as an important aspect of financial planning, and to learn about the 17 insurance companies offering policies in New York. This campaign includes a dedicated web site:

www.planaheadny.com and a new long-term care insurance helpline at 1-866-950-PLAN, as well as television and radio commercials; print advertisements; direct mailings to the public; and Long-Term Care Insurance Resource centers located in every county of the state.

Office of Mental Retardation and Developmental Disabilities (OMRDD):

Project 2015 heightened OMRDD's awareness of aging issues in their service system. In particular, OMRDD is paying special attention to the residential and day activity needs of the older people they serve.

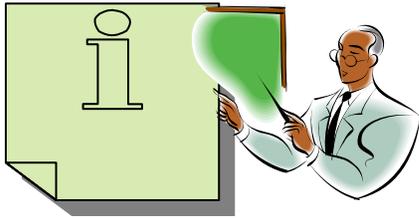
OMRDD is addressing physical plant accessibility issues to allow people to "age in place." The special needs of older people who wish to retire from their day and

vocational programs also are being met.

Services and support needs are being provided for older people with dementia, those who are medically frail or who have chronic medical conditions through a special New York State initiative known as Options for People Through Services (OPTS). OPTS promotes the kind of systems change needed to maintain older people in the community. Through OPTS, OMRDD is providing enhanced individualized residential support to address special medical needs.

An exciting OPTS project in the Finger Lakes region is using telemedicine to reduce multiple visits to hospital emergency rooms and doctors' offices by older people with chronic medical conditions who reside in a residential program. The project design includes evaluation of the medical outcomes of the participants.

OMRDD's OPTS initiative has removed many barriers previously experienced in meeting the special needs of an aging population. As OPTS unfolds, the agency is seeing significant improvements and refinements to the developmental services system which are making "aging in place" a realistic outcome for the people they serve.



3. Advocacy / Education / Outreach to the Public

The **Public Service Commission** has integrated the agency's Project 2015 goals into their consumer education efforts. They have developed programs to help educate seniors and Spanish-speaking people about how to be energy-smart, and to promote "Green Power" to decrease our dependence on fossil fuels.

The **Consumer Protection Board** has expanded the issues they address in their outreach programs and more directly address the concerns of ethnic minority communities. The Consumer Protection Board also is partnering with the Governor's Citizenship Unit and the Office of Temporary and Disability Assistance's Translation Unit to further improve their outreach to non-English speaking communities on consumer fraud issues.

The **Department of Environmental Conservation** (DEC) has increased the diversity of its staffing and presentations at more than 100 outreach programs and activities that serve New York communities. DEC also has improved accessibility to physical facilities of camps/centers. For

example, a new self-guided trail was created at the Mt. Loretto Unique Area, Staten Island, and accessibility trails have been added at Stony Kill and Rogers Environmental Education Centers.

For the "Help America Vote Act," the **Commission on Quality of Care and Advocacy for Persons with Disabilities** staff has begun a series of trainings for poll workers to sensitize them to the needs of elderly voters and voters with disabilities. The Commission also has provided training on accessibility provisions of the Building Code to developers, building inspectors, local code enforcement officers, engineers and architects. This important activity is designed to help ensure that appropriate numbers of accessible housing units are being constructed for persons who are elderly or have a disability.

The **Office of Parks, Recreation and Historic Preservation** is conducting two surveys – one directed to all municipalities in the state, and the second to citizens, to gather information about recreation needs, including needs for people over age 50. This information will be used to update the Statewide Trails Plan, to provide future policy and program direction for parks.

The **Office of Temporary and Disability Assistance** has initiated an in-depth examination of local social services district practices for cases where there is a

grandparent as a caregiver for children who are 'child-only' cases (a parent is not part of the welfare grant). The purpose of this review is to better understand what services are currently provided and what services are needed by these families e.g., access to Earned Income Tax Credit).

The **Office of Mental Retardation and Developmental Disabilities** held eight Constituent Forums throughout New York. Aging issues were raised by many members of the public who spoke. There was a particular focus on services and supports for older people with dementia, those who are medically frail or who have chronic conditions. OMRDD is addressing the needs identified through the initiative, Options for People Through Services (OPTS) (Note: see New Laws/Acts/Programs section for details about OPTS).



4. Web Sites/ Product Changes

The **Department of Insurance** has added a Senior Citizens Insurance Resource Center to its Web site [www.ins.state.ny.us/cseniors.htm]. The Web site provides up-to-date information to help New York seniors evaluate and compare

insurance options, costs, and companies to get the most from their insurance dollar.

- Text on their Web site is now larger and bolder-- easier to read.
- The Long-Term Care section has been expanded and updated.
- There is new information now available about Medicare, Part D.

The **Department of Motor Vehicles** Web site now includes Spanish language content, as does the **Department of Environmental Conservation's** Web site.

The **Department of Environmental Conservation** publishes a magazine, called The Conservationist magazine. Changes they've made to better serve an older and more diverse population include: upsizing its type, tailoring the text reading level and adding content to serve senior citizens, urban residents, disabled readers, and minorities. Diverse groups are now represented in photo illustrations. Plans include expanding content to serve minorities and urban residents. They also plan to partner with non-governmental organizations such as museums and environmental groups to recruit new and diverse readers.

The **Department of Taxation and Finance** is utilizing e-commerce software to provide authentication services to customers. While not directed solely at the aging population of New York, a statewide authentication network

(SWAN) will allow customers single point of access to government services without regard to which agency provides the services.

The **Office of Temporary and Disability Assistance (OTDA)** created an internet browser-based electronic process to increase the ease of applying for the Home Energy Assistance Program (HEAP), particularly for elders and people with disabilities who are not currently receiving HEAP. This new tool, called the HEAP Benefit Calculator Application (HBCA) also saves local district staff time and reduces the amount of time needed to determine eligibility for a HEAP benefit.

In addition, OTDA has continued the New York State Nutrition Improvement Project, which provides automated Food Stamp eligibility for significant numbers of Supplemental Security Insurance (SSI) recipients, many of whom are elderly, who might not otherwise apply for Food Stamps.



5. Coalitions and Collaborations

The **Department of Health and New York State Office for the Aging** are collaborating to implement the NY ANSWERS program, emphasizing Point of

Entry (POE) assessment and management of long term care clients along a continuum of least restrictive care. The approach focuses on the integration of institutional, home and community-based services to meet clients' needs.

The **Department of Agriculture and Markets** is looking to increase support for farmland protection programs, for farmers in highly developed areas, and to strengthen programs such as FarmLink to match older farmers who do not have family members to pass the farm to, with young, prospective farm operators who are looking to enter this enterprise.

The **Banking Department** has been collaborating with **Empire State Development**, New York City's Departments of Small Business Services, City Planning, and Finance to promote an initiative to encourage banks to open branches in underserved communities in New York.

A public – private collaboration has been established between International Paper, Paul Smith College and the **Department of Environmental Conservation** to manage a section of the Adirondack Park developed with universal access features. The Park will provide a wilderness opportunity for people with disabilities including camping, hiking, fishing, and boating through its universally designed trails, lean-tos, boating docks, and

fishing piers in John Dillon Park near Long Lake, New York.

The **Consumer Protection Board** and the **Department of Insurance** are partnering to disseminate information on subjects such as: how to purchase long- term care insurance, how to purchase life insurance, and how to purchase health insurance.

The **Department of Correctional Services**, with the **Office of Mental Health**, is developing a new cognitive disorder unit for inmates with Alzheimer's. It is on schedule to begin operations in October, 2006, at the Fishkill Correctional Facility Regional Medical Unit.

The **Council on Children and Families** and the **Office for the Aging** are collaborating on the development of a new comprehensive data resource about New York's adults age 50 and over entitled, *Facts About 50 Plus in New York*, which will include indicators of elderly well-being in six life domains. This initiative is intended to address the gaps in community-level data about adults age 50 and older; this resource will be invaluable in assisting our ability to plan, to formulate policy, and to develop programs and products.

The **Office of Alcoholism and Substance Abuse Services** is collaborating with the **Office for the Aging** to raise awareness and identify issues related to seniors and chemical-dependency issues.

One result of these efforts is the establishment of local senior work groups that are collaborating to improve seniors' access to prevention, intervention, treatment, and recovery services.

The **Commission on Quality of Care and Advocacy for Persons with Disabilities**, in collaboration with the **Motor Vehicle Medical Advisory Board**, developed Med-Cads—a standardized tool to determine medical conditions affecting driver safety.

The **Office of Parks, Recreation and Historic Preservation** has been working with the **Department of Health** to make the public more aware of skin cancer and ways to reduce exposure to the sun.

The **Department of Insurance** with the **Office for the Aging** developed information and technical assistance on the Health Insurance Information Counseling and Assistance program (HIICAP) for the training of HIICAP counselors and volunteers.

The **Department of Insurance**, together with the **Office for Aging** and **Department of Health** completed a comprehensive study to analyze current long-term care insurance offerings in New York. The study focused on the affordability and adequacy of policy benefits with an emphasis on assisting individuals to remain in their own homes, evaluation of the effect of pre-existing medical conditions on the availability and

affordability of long-term care insurance benefits, and evaluation of the adequacy of the process by which disputes related to policy benefits between insurers and consumers of long-term care insurance policies are resolved.

6. Funding

Administered by the **Department of Health**, a total of \$53 million in **Healthcare Efficiency and Affordability (HEAL-NY)** funds (*awarded in May 2006) will support the development of health information technology systems for hospitals, nursing homes, physician practices and other providers throughout New York. An additional \$269 million in HEAL-NY funds are being made available for the restructuring of hospitals and nursing homes, including measures to reduce unneeded nursing home beds ("right-sizing" of nursing homes) and encourage the growth of non-institutional alternatives to nursing home care.

The 2006-2007 New York State Executive Budget included \$2 million to support demonstration programs under the **2005 Geriatric Mental Health Act**. These will be co-administered by the **Office of Mental Health** and the **State Office for the Aging**.

New York's state-funded home care program, the Expanded In-home Services for the Elderly Program (EISEP) is a vital, effective program in delivering case management and home care services to New York's non-

Medicaid elderly population across the state. This program's budget will be *doubling* in a 2-year period.

The **Office of Temporary and Disability Assistance (OTDA)** participates in the Kinicare Coalition, and is assisting with information for grandparents who are providing care to their grandchildren. OTDA released a policy bulletin, "Temporary Assistance Policy: Non-parent Caregiver Cases and Temporary Assistance" in 2005, as part of this collaboration.



Project 2015 provides an effective approach to focusing attention around the importance of preparing for the impact of demographic and social change. With the advent of Project 2015, New York has made a great deal of progress in better matching policies, products, and practices with the consumer profile of our State.

New York continues to build upon Project 2015's comprehensive, future-oriented, evidence-based strategic planning approach to preparing for the impact of demographic change and to shaping the direction of our programs and services to best fit the services available to the people who need those services.

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This initiative provides a central framework and means to inform the public and to engage collaboratively and creatively as we continue to make New York communities vital, quality places for all its residents to live. As with all long-term initiatives, a challenge for this initiative is sustaining the momentum across all government sectors. Committed leadership is a key factor to enabling ongoing engagement across cabinet agencies.

Project 2015 materials may be viewed on the New York State Office for the Aging's Web site:
<http://www.aging.state.ny.us/explore/project2015/index.htm>

TIME LINE

PROJECT 2015: New York State Government's Initiative

January, 2002:

Managing agency: Governor George Pataki charged the New York State Office for the Aging with responsibility for designing and managing the Project 2015 planning initiative. This responsibility built upon a project conducted in 1998 between the State Office for the Aging and the State Society on Aging of New York, in which a series of 24 articles about topics related to the aging of the baby boom population was developed. For Project 2015, the State Office for the Aging designated four professional and two support staff as a Project 2015 Management Team, which designed and coordinated the initiative.

February, 2002:

The initiative was launched: The Governor convened 36 cabinet-level agencies and explicitly charged them with fully participating in the Project 2015 planning initiative, following the directives of the Office for the Aging, and completing the assigned tasks within the scheduled time frame.

Major work product of the initiative--written briefs: As a means for assuring overall consistency among the agencies in carrying out the work of the nine-month process, each agency was required to write an eight-page brief, which was based upon a set of five questions. The briefs consisted of three parts, completed over three specified time periods: (1) an analysis by each agency of the impact of the aging and increasing diversity of the state's population on its own mission, policies, products and services, constituent make-up, and day-to-day work; (2) prioritization of the issue areas that emerged for the agency from the impacts; and (3) identification of action steps and strategies that the agency would

take over the following five years to address the issue areas, together with anticipated outcomes expected from the action steps.

Work group meeting: All 36 agencies met to (1) receive a complete description of the nine-month project, including deliverables and time line, (2) receive a comprehensive presentation by the State's Chief Demographer about the projected demographics facing the State, and their implications, (3) receive detailed instructions on completing their agency work plans, and (4) receive detailed instructions for carrying out Part 1 of the written briefs.

February through October, 2002:

Technical Assistance: The State Office for the Aging Project 2015 Management Team divided the 36 agencies into four groups of nine agencies each, and assigned a team member to each of the four groups. Each liaison served as a consistent technical assistance liaison to her assigned nine agencies throughout the nine-month process.

March, 2002:

Work plan: Each agency submitted an agency-specific work plan to the Management Team. The plan spelled out the agency's assigned lead designee and project staff for the initiative, the process and staff the agency would use for each of the tasks required for the initiative, and its agency time line for completing each of the tasks for the nine-month process.

Status report: Each agency provided a status report to the Management Team, spelling out the agency's progress in writing Part 1 of its written brief, which was due on April 16.

Work group meeting: The 36 agencies met together to peer-review their progress and to share the preliminary results of their Part 1 analyses with each other. The group received instruction on creating and maintaining effective collaborations and the

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tangible benefits of including non-traditional collaborative partners.

April, 2002:

Brief Part 1: Each agency submitted Part 1 of its agency brief to the Management Team.

Work group meeting: The 36 agencies met together to receive detailed instructions on conducting Part 2 of the written briefs and to engage in a discussion of effective alternative methods of prioritizing issue areas.

May, 2002:

Brief part 2: Each agency submitted Part 2 of its agency brief to the Management Team.

Review: The Governor's office reviewed Parts 1 and 2 of the agencies' briefs.

Work group meeting: The 36 agencies met together to share results of their prioritization process with each other, to receive detailed instructions about developing response strategies and action steps for Part 3 of their written briefs, and to receive training about identifying indicators and defining anticipated outcomes.

June, 2002:

Brief Part 3: Each agency submitted Part 3 of its agency brief to the Management Team.

Work group meeting: The 36 agencies met together to share action steps and outcomes indicators and to discuss preparations for the Governor's Symposium that would conclude the nine-month structured planning process.

Review: The Governor's office reviewed the completed briefs, and each agency finalized its product.

July, 2002:

Work group meeting: The 36 agencies met together to review feedback from the Governor's office, hear about publication of the 36 briefs into a policy document for future work, and to continue Symposium preparation.

Supplemental articles: The Management Team received agreement from the State's Chief Demographer, the Director of the State Office for the Aging, and a Professor from the State University of New York—New Paltz to write three articles that would serve as an introduction to the 36 briefs when they were published as a policy document.

Analysis: A member of the Management Team analyzed the content of the 36 agencies' briefs and wrote an analysis and summary of the work to be included in the published policy document.

August and September, 2002:

Publication: The Management Team prepared all briefs, all supplemental articles, and all appendices for publication and oversaw all printing tasks. The published policy document was entitled, *"Project 2015—State Agencies Prepare for the Impact of an Aging New York: White Paper for Discussion."*

White Paper: Each brief reflects that agency's own mission and function and stands alone as a basis for action by the agency. Together, the 36 briefs form one cohesive policy document and a practical framework for New York State to prepare for the future.

September and October, 2002:

Symposium: The Management Team finalized preparations for the Symposium, including identifying speakers, arranging a breakfast for the Governor and agency Commissioners, and planning the Symposium workshops that would train the agencies on effective ways of reaching out to their constituent networks and to the

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general public about the impact of anticipated demographic change and about their own analysis and action steps.

October 30, 2002:

The Symposium: At the day-long Symposium, the Commissioners presented the *White Paper* to the Governor. The agencies were charged with implementing their identified action steps following the Symposium.

August through December, 2002:

Evaluation: A researcher from the Center for Excellence in Aging Services, University at Albany, conducted personal interviews of the agencies' Commissioners and focus groups of the agencies' Project 2015 work staff to document the agencies' experiences, perceptions, and attitudes regarding the Project 2015 process, the work assignments, and the management process. Two members of the Management Team analyzed the entire initiative and identified 19 core elements of the process that were deemed to have been necessary to assure its success and its completion within the allotted time frame. All these findings were published by the State Office for the Aging in a document, entitled "*Project 2015—GUIDE to New York State Government's Planning Initiative.*" This document has served as a "how-to" manual for others who wish to replicate New York's process, and it will serve as the basis for the curriculum that is being developed to train government teams from other states under the Project 2015 National Initiative.

2003:

Distribution: The State Office for the Aging distributed the *White Paper* and the *GUIDE* across the state, as well as to the Governors, state legislative leaders, state units on aging, state data centers, and other state and national agencies across the country.

Community-based replication: The State Office for the Aging trained the State's

59 Area Agencies on Aging (AAAs) on the Project 2015 process and developed a Project 2015 Community Tool Kit for use by the AAAs to: (1) educate community leaders, decision-makers, and citizens about the implications of dynamic population change, and (2) implement a community-based planning process for preparing community organizations and local governments for the impact of these changes.

2003-present:

New York State agencies: State government agencies are implementing the identified action steps, strategies, and collaborations identified in their agency briefs; are training their staff about the implications of demographic change and the Project 2015 process for preparing for these changes; and are integrating the new planning approach into their routine planning activities.

2003-present:

Outreach: Project 2015 materials are used in a variety of venues to educate and to stimulate discussion about the State's changing demographics and the implications of these changes, including conferences, university classrooms, community forums, various media, and professional training sessions.

The various New York State agencies discuss the Project 2015 planning approach with their own constituent networks, at various professional meetings, and with consumers.

On a regular basis, the Director of the New York State Office for the Aging and two members of the Project 2015 Management Team train others across the country on the Project 2015 process and its outcomes in New York—at national conferences and at professional meetings.

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2003 - 2005:

Status Reports: Each year, the State Office for the Aging conducts a survey of the 36 state agencies to document the activities and actions implemented by each agency that can be directly attributed to the Project 2015 process. The findings from these surveys are published by the State Office for the Aging under the titles, "Project 2015 Status Report, 2003," "Project 2015 Status Report, 2004," and "Project 2015 Status Report, 2005."

2005:

Project 2015 National Initiative: In response to strong interest from other states and organizations across the country, the State Office for the Aging designated two members of the Management Team as Project 2015 Principals, with responsibility for designing a framework for taking Project 2015 to national scale. National organizations were identified, contacted, and their agreement received to participate as members, or as an affiliate, of a Project 2015 National Collaborative, which will be used as a mechanism for implementing the Project 2015 National Initiative.

The Project 2015 National Initiative will consist of two components: (1) training state governments across the country in replicating/adapting New York's approach to preparing for the impact of dynamic population change, together with the provision of technical assistance in seeing them through the structured, future-oriented planning process, and (2) training communities across the country in Project 2015's inclusive approach to bringing disparate sectors together for the purpose of future-based planning around demographic change. The National Initiative will draw upon the National Collaborative members to engage their local constituent members in implementing Project 2015 at the community level. The member organizations and one affiliate member of the National Collaborative are:

National Governors Association; AARP; National Association of Area Agencies on Aging; Corporation for Public Broadcasting; Dr. John Logan, Demographer, Brown University; The National Human Services Assembly; U. S. Chamber of Commerce; Consortium for Citizens with Disabilities; The Council on Foundations; American Library Association; National Association of State Units on Aging; The John A. Hartford Foundation; The National Association of Counties; Temple University Center for Intergenerational Learning; The Atlantic Philanthropies; Generations United; American Society on Aging; and Affiliate: The Council of State Governments.

Project 2015 Publications

Project 2015: The Future of Aging in New York State – A Tool Kit for Community Action (2003, New York State Office for the Aging, 2003). The Project 2015 Tool Kit is a compendium of materials developed through a partnership of the New York State Office for the Aging, New York State Association of Area Agencies on Aging and the New York State Coalition for the Aging, as part of the continuing commitment to plan for the impact of our State's changing demographic profile. The Tool Kit provides local conveners – the State's 59 Area Agencies on Aging – with the materials and the ability to engage community stakeholders in preparing for the impact of our changing demographics on communities across the state.

Project 2015: Guide to New York State Government's Planning Initiative (2003, New York State Office for the Aging, 2003). Documented in a joint effort by the New York State Office for the Aging and the University at Albany's Center for Excellence in Aging Services, the *Guide* describes the Project 2015 strategic planning process and identifies the core elements of success in this initiative. It provides information about the overall design, management, and implementation of Project 2015, and can be used by government and community leaders who are seeking to engage in a multi-agency or community-wide planning process to develop action steps around a common issue.

Project 2015: State Agencies Prepare for the Impact of an Aging New York: White Paper for Discussion (2002, New York State Office for the Aging; on the Web at <http://www.aging.state.ny.us/explore/project2015/index.htm>). The Project 2015 White Paper includes a compendium of Briefs developed by each of the 36 participating state government agencies in the strategic planning process that was launched in 2002. The publication also

includes introductory articles about the changing face of New York – the people and the numbers, and an analysis and summary of the 36 state agency policy briefs. The publication provides both a basis from which individual state agencies are continuing to take concrete actions and a practical framework for New York State to prepare for the future impact of population change.

Project 2015: Population Characteristics by County (2002, New York State Office for the Aging; on the Web at <http://www.aging.state.ny.us/explore/project2015/index.htm>). Developed by Empire State Development's State Data Center and published by the State Office for the Aging as a companion document to *Project 2015: State Agencies Prepare for the Impact of an Aging New York: White Paper for Discussion*. It provides population projections for New York State (all ages) based on the 2000 Census.

Project 2015: The Future of Aging in New York State: Articles and Briefs for Discussion (2000, reprinted 2002, New York State Office for the Aging; on the Web at <http://www.aging.state.ny.us/explore/project2015/index.htm>). This publication was produced as a joint effort by the State Society on Aging of New York and the New York State Office for the Aging. This publication, written by researchers, service providers, policy analysts, and other professionals with expertise in the field of aging, includes 24 articles and briefs on the future of a variety of aging issues.

Demographic Projections to 2025 (1999, reprinted 2002 New York State Office for the Aging; on the Web at <http://www.aging.state.ny.us/explore/project2015/index.htm>). Developed by the New York State Office for the Aging as a companion document to *Project 2015: The Future of Aging in New York State: Articles and Briefs for Discussion*, it provides aging-related population projections for New York State based on the 1990 Census.