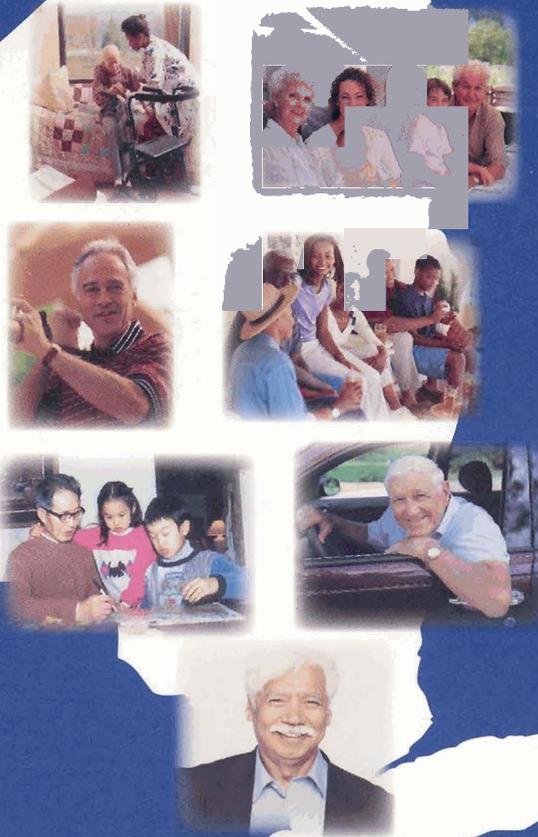


# Guide

## to New York State Government's Planning Initiative

# Project 2015



**State Agencies Prepare for  
the Impact of an Aging New York**

NEW YORK STATE

George E. Pataki, Governor - Patricia P. Pine, Ph.D., Director, NYS Office for the Aging

# **Guide to New York State Government's Planning Initiative**

***Project 2015:  
State Agencies Prepare  
for the Impact of an Aging New York***

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## New York State Office for the Aging

2003

Dear Colleague,

I am pleased to present to you this publication, *Guide to New York State Government's Planning Initiative*.

This Guide describes *Project 2015: State Agencies Prepare for the Impact of an Aging New York*, which is a planning initiative involving 36 New York State government agencies. Through this initiative, the agencies gained an understanding of several major demographic changes that our State will experience over the next 10 to 15 years -- particularly the aging of our population. They deliberated the impact of these demographic changes on their agencies; and they identified strategies, action steps, and collaborations they could employ to assure that their agencies would be prepared to meet the impact of our State's dramatically shifting population profile.

The initiative described in this Guide was carried out in 2002 and is one component of PROJECT 2015, which is an ongoing series of activities that began in 1998 and will continue to unfold as a living process to engage New York State in planning for the future. The 2002 initiative was extremely successful and set the stage for further activities by the state agencies and communities across the State. For those who may wish to engage in a similar multi-agency or community-wide planning process around a common issue, the framework described in this Guide offers a very useful model.

I am pleased to share our experience with you.



**Patricia P. Pine, Ph.D.**

# Guide to New York State Government's Planning Initiative

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# **Guide to New York State Government's Planning Initiative**

## **INTRODUCTION**

Project 2015: State Agencies Prepare for the Impact of an Aging New York (hereafter referred to as Project 2015) was a nine-month planning process involving 36 New York State government agencies. It was carried out in 2002 at the direction of the Governor and managed under the leadership of the New York State Office for the Aging (NYSOFA). The aim of this planning project was to help state government agencies prepare to appropriately meet the needs of New York's citizens as the State's demographic profile shifts significantly through the coming years. The 2002 planning project is one component of a larger effort carried out under the general rubric of PROJECT 2015. PROJECT 2015 is an ongoing series of future-oriented activities that began in 1998 and which will continue to unfold as a living process to engage all of New York State in planning for the future.

For the 2002 planning process, each agency conducted an agency-specific analysis of major demographic trends shaping New York's population profile (increasing -- aging, disability, immigration, migration, and diversity). The agencies assessed the impact of these trends on their agencies' mission, programs, services, constituency make-up, and day-to-day administration and recommended strategies and action steps they each could implement to address these impacts. Each agency's assessment and planning strategies were recorded in a policy brief, and the 36 briefs were assembled into a policy document entitled *Project 2015: State Agencies Prepare for the Impact of an Aging New York: White Paper for Discussion*. This White Paper is being distributed to be used across the state as a basis for discussions by government agencies, citizens, and community leaders and groups to further help New York State prepare for the impact of the anticipated demographic changes.

**Guide --** This *Guide to New York State Government's Planning Initiative* describes the framework of New York's Project 2015 planning initiative. It can be used by government and community leaders who are seeking to engage in a multi-agency or community-wide planning process around a common issue. The 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 a list of all the publications that have been developed through the series of PROJECT 2015 activities that began in 1998.

The process of designing and implementing Project 2015, as well as the perceptions of the agencies' leaders and staff who participated in the

project, was 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. Throughout the initiative, several methods were used by the Center to collect information for the Guide: (1) in-depth interviews and focus groups of selected agency leaders and key 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.

Personal interviews were conducted with the Commissioners of six agencies randomly chosen from the 36 participating agencies and with the Project 2015 Designees of six additional randomly chosen agencies. For the remaining 24 participating state agencies, staff members who were directly involved in their agency's Project 2015 tasks were asked to attend one of three focus groups. One focus group was held with representatives from eight small (150 or fewer employees) agencies, and two were held with representatives from 14 large agencies (over 150 employees). Representatives from two large agencies were unable to participate in the focus groups. A standardized, structured interview and focus group protocol was used to insure uniformity of response categories. In addition, an open discussion format followed the structured segments to enable interview and focus group respondents to discuss any perceptions and areas they felt were relevant to the project but were not included in the structured protocol.

*The planning process designed for Project 2015 was a unique one for state government agencies. At the start of the initiative, the Management Team included a documentation process in the initiative's design in order to use the findings to create a Guide that would outline the elements of the process for others to replicate or adapt. The Management Team chose an impartial outside-the-process organization (non-government) to collect the perceptions of project participants in order to assure maximum candor and openness in the participants' responses, as well as unbiased interpretation of those responses.*

## **SUMMARY of MAJOR COMPONENTS**

These 13 components can be characterized as the major building blocks, or basic framework, of the Project 2015 planning initiative. These, and other aspects of the initiative, are discussed in detail in this guide.

<b>36 Participating Agencies</b>	<i>Cabinet-level, selected by the Governor</i>
<b>One Lead Managing Agency</b>	<i>Designated by the Governor</i>
<b>Dedicated Management Team</b>	<i>Remained constant throughout project</i>
<b>Kick-Off Meeting</b>	<i>Initial charge to Commissioners given by the Governor</i>
<b>Agency's Project Designee</b>	<i>Selected by each Commissioner</i>
<b>Agency-Specific Work Plans</b>	<i>Completed/submitted 1st month of project</i>
<b>Current and Projected Demographic Data</b>	<i>Provided to all agencies</i>
<b>Monthly State Agency Work Group Meetings</b>	<i>Attended by all Designees</i>
<b>Individualized Technical Assistance</b>	<i>Provided by Management Team</i>
<b>Three-Part Brief</b>	<i>Written by each agency</i>
<b>White Paper Developed and Printed</b>	<i>Compilation of 36 briefs and articles</i>
<b>Governor's Symposium</b>	<i>Project 2015's next steps deliberated</i>
<b>White Paper Distributed to Wider Audience</b>	<i>As basis for further discussion</i>

## CORE ELEMENTS – MAKING THE INITIATIVE WORK

Analysis by the Management Team determined that certain factors assured the success of Project 2015. Without these core elements, the initiative could not have been completed within the allotted time frame.

<p><b>EXECUTIVE LEADERSHIP</b> – There was ongoing, direct leadership and involvement of the top executive. For Project 2015, this was the Governor.</p>
<p><b>PARTICIPATING AGENCIES: INTERNAL DECISION-MAKING LEVERAGE</b> – Each Commissioner was required to designate a top-level individual to lead/manage the agency’s Project 2015 work (the Designee). For each agency, this was critical to assure the project’s priority status within the agency, to command reallocation of necessary resources, to keep information flowing, and to achieve timely completion and sign-off of all products.</p>
<p><b>CLEAR PURPOSE AND GOALS</b> – The purpose and goals of Project 2015 were very clearly stated in the initial charge to the Commissioners. The purpose and goals were fully defined and described for agencies’ Designees and project work staff at the first interagency work group meeting.</p>
<p><b>COMMON ISSUE</b> – While the participating agencies have disparate missions, products, and consumer constituencies, the issue addressed by Project 2015 (the impact of demographic change) was common across all agencies and formed a common basis for deliberation.</p>
<p><b>LEAD AGENCY: GIVEN MANAGEMENT LEADERSHIP AND AUTHORITY</b> – From among the 36 cabinet-level agencies participating in Project 2015, one was designated by the Governor to design and manage the overall initiative. The Governor’s designation provided the necessary authority required for the lead agency to prescribe and direct the activities of its peer agencies.</p>
<p><b>CLEARLY DEFINED MANAGEMENT TEAM</b> – Within the lead agency, eight individuals were selected to form the Project 2015 Management Team, responsible for all aspects of the initiative’s design, activities, materials, implementation, technical assistance, and management. This team remained intact from the beginning through the end of the initiative.</p>
<p><b>EFFECTIVE MANAGEMENT/TRACKING STRATEGIES</b> – Several “management tools” were used to keep all agencies on track and all products completed with the tight time frame: an assigned high-level Designee, required attendance at monthly meetings, assigned technical assistance liaisons, structured time line and firm due dates, standardized instructions, and a structured framework for the written brief.</p>

## CORE ELEMENTS – MAKING THE INITIATIVE WORK, continued

**COMMON FRAMEWORK FOR DISCUSSION** – Very early in Project 2015, a demographer provided an oral presentation and printed information to all Designees and project work staff on the five major demographic changes that would anchor the issue to be considered by the agencies. This was critical for articulating a common, consistent platform for each agency’s deliberations for Project 2015.

**COMMON FRAMEWORK FOR ANALYSIS** – A set of five questions and a three-stage writing structure were developed at the *start* of the initiative as the defined framework for all agencies to conduct the analysis and planning necessary for writing their policy briefs.

**CLEARLY ESTABLISHED DELIVERABLES** – All interim and final products for Project 2015, and their due dates, were prescribed and clearly defined for all agencies at the *start* of the initiative. These included an agency work plan, attendance at all state agency work group meetings and the symposium, a status report, and a three-part written brief.

**STRUCTURED TIME TABLE** – A tight, but manageable, time frame was established for the entire initiative and was provided to agencies in the initial charge. The time table was displayed in chart format as a one-page work plan (which could be used by agencies as an easy reference guide) and included deliverable products, major meetings, and due dates for each.

**MEETING CALENDAR SET EARLY** – The calendars of high-level, busy individuals fill quickly. To assure committed presence at the required monthly state agency work group meetings, the entire calendar of meetings was set prior to the start of the project and provided to participants in the initial charge. Meetings were held on a regular basis to maintain enthusiasm and sustained commitment to the project.

**AGENCY-SPECIFIC WORK PLAN** – Within the first month of the project, as their first deliverable product, each agency was required to submit an agency work plan outlining the details of how and when each activity of their Project 2015 work would be completed and who would be involved. This strategy forced participants, prior to starting their analysis and planning, to think through their work steps for the entire initiative and to plan ahead for the allocation of resources and the timing required for each part of the work. This strategy was instrumental in assuring the agencies’ sustained engagement in the project.

**STRUCTURED FRAMEWORK / FLEXIBLE IMPLEMENTATION** – The initiative’s macro framework was highly structured; but each agency established its own internal process to assign workers and other resources, and each designed its own process for carrying out the necessary tasks, activities, and products. This allowed the agencies to conduct the work according to what worked best for each of them.

## CORE ELEMENTS – MAKING THE INITIATIVE WORK, continued

**MAKE IT MANAGEABLE** -- To complete the work of Project 2015 within the stated time frame and keep the agencies on track, both the project's products and time line were divided into manageable pieces. Specific directions and an assigned due date accompanied each piece. This kept participants from feeling overwhelmed by the total responsibilities involved and eliminated time slippage.

**LIGHT AT THE END OF THE TUNNEL** – Maintaining the requisite work pace with no supplemental resources could only be kept up because the initiative had a defined start and end date, and the initiative's total dedicated time period (nine months) was viewed by agencies as a feasible one for sustaining the pace.

**TECHNICAL ASSISTANCE PROVIDED** – Directions and technical assistance were provided at monthly group meetings. However, four members of the Management Team were each paired with nine specific agencies to respond quickly to agencies on an individual basis regarding any issues and problems that emerged as the agencies moved through the initiative's process. These pairings remained constant throughout the nine-month period.

**SUPPORT FROM PARTICIPATING AGENCIES** – A number of the participating agencies were solicited to provide various types of assistance (skills, capacity, resources) to the Management Team throughout the initiative. This helped spread the financial costs of the project, it capitalized on needed skills and resources that existed in other agencies, and it provided a means for the other agencies to realize a tangible investment in the outcome and success of the initiative.

**THINK OUTSIDE-THE-BOX** – When assembling agencies into small groups for joint activities, agencies were not grouped by traditional themes/missions (such as health, human services, infrastructure, economic development, etc.). Instead, agencies were randomly assigned for small-group activities and multiple work staff from any one agency were dispersed among tables for large-group discussions. This resulted in (1) cross-sharing of information among agencies that had not generally done so before, (2) understanding the overlap that exists among all agencies, and (3) stimulation of non-traditional collaborative efforts.

## **PARTICIPANTS' CONCLUSIONS HAVING IMPLICATIONS for POLICY MAKERS**

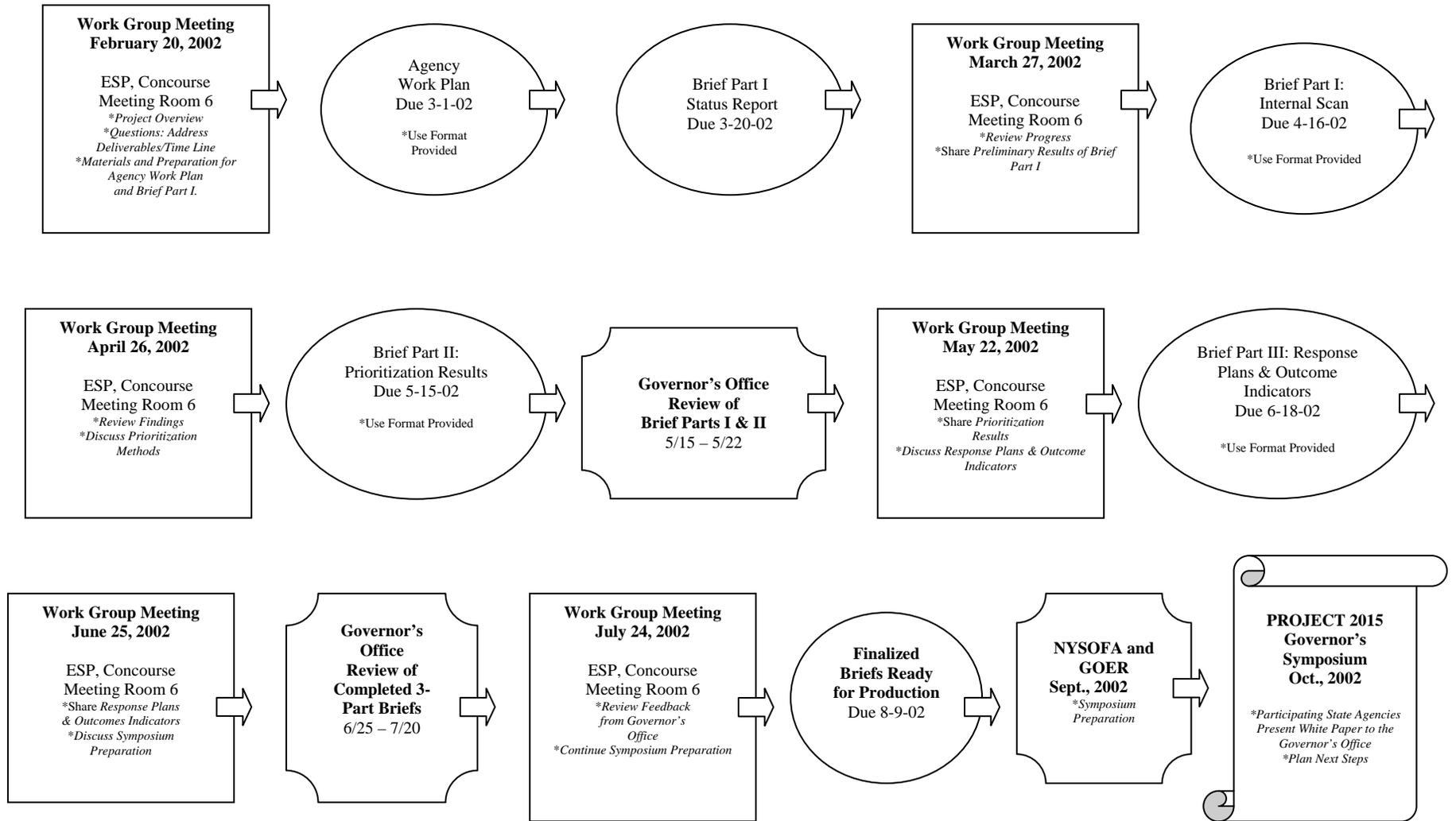
The 36 Project 2015 agency briefs were analyzed, and interviews and focus groups were conducted with Project 2015 participants. Several collective opinions emerged from these procedures that have significant implications for policy makers.

**GOAL** – An analysis of the agencies' 36 briefs 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.

**INSTITUTIONALIZED PLANNING MODE** – Participants expressed a concern that Project 2015 would become just another well-intentioned government initiative that is never fully implemented. General agreement was expressed by the Commissioners and Designees that Project 2015 needs to be kept alive and become institutionalized within state government as a way of planning and doing business.

**INTERNALIZED SENSITIVITY** – Participants suggested various means of achieving an internalized sensitivity to the importance of continued planning around the critical issues agencies identified through Project 2015: agencies must (1) raise awareness about the changing demographics throughout their agencies, (2) take concrete steps to follow through with the action steps provided in their briefs, and (3) bring the discussion of Project 2015 issues and action steps to consumers, organizations, and leaders in the outside community.

## Project 2015 – State Agency Briefing Paper Preparation Process (Project 2015 Work Plan)



The Project 2015 Work Plan served as a reference document for the agencies as they implemented the Project 2015 initiative. The reverse side of the Project 2015 Work Plan contained the names, phone numbers, and email addresses of the Management Team members for technical support, as well as the email address, phone number, and fax number for the Management Team's primary support staff person, who served as the centralized point for receiving written materials.

# **Guide to New York State Government's Planning Initiative**

## **BACKGROUND**

Project 2015 is one initiative among an ongoing series of activities in New York State that are intended to raise awareness of the State's shifting demographic profile and to help governments and communities use a "future-oriented" planning process to prepare for these expected changes. Activities conducted under the larger PROJECT 2015 effort began in 1998.

**1998 – 2001 Activities** -- In a 1998 joint conference-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, Director of NYSOFA, 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. From this meeting, a joint initiative was instituted by SSA and NYSOFA, which resulted in the development of the document, *Project 2015: The Future of Aging in New York State: Articles and Briefs for Discussion*, which was published by the 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.

**2002 Activities** -- The interest created around the impact of the State's changing age profile prompted a dialogue between the State Office for the Aging and the Governor's office to consider strategies for engaging state agencies in a planning process that would prepare them for various significant demographic profile changes anticipated through the subsequent ten to 15 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. The major product of this initiative was a policy document, *Project 2015: State Agencies Prepare for the Impact of an Aging New York: White Paper for Discussion* (hereafter referred to as the White Paper), which will be used as a basis for further, ongoing discussion among all citizens and groups across the State.

## PROJECT 2015 – THE 2002 INITIATIVE

### Intent:

**Issue Identified** -- 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 elderly population and the impending passage of the large Baby Boom generation into the elder cohort, 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. 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, and practices of state government agencies. The issue identified as the basis for Project 2015 was: how can state government agencies plan and be prepared for the impacts of these specifically identified demographic changes.

*The issue to be addressed was stated in specific terms, and it was 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 briefs that formed a cohesive, clear policy document for practical use.*

**Purpose, Objectives, and Goals** – The purpose of Project 2015 was to create a **process** for state agencies to prepare for the future—and to do this by: (1) bringing attention to the increasing diversity and overall aging of our population and raising awareness of this among all agencies' staff, and (2) initiating a mode of planning by state government that will consistently respond, across disciplines and across areas of responsibility, to the evolving impact of our changing population.

The process included major steps designed to achieve the purpose: (1) agencies were educated about the State's major projected demographic trends and were asked to conduct an internal scan of the overarching issue areas in their agencies that would be affected by these trends, (2) agencies were asked to deliberate and prioritize the impact of the demographic trends on these issue areas, and (3) agencies were asked to identify strategies and action steps for addressing these impacts.

*Initial activities under the larger PROJECT 2015 effort focused on the impact of the **aging** of New York's population. The areas for analysis for the 2002 Project 2015 planning process were expanded beyond the impact of the aging of New York's population to include the impact of several additional major demographic trends (immigration, migration, diversity, and disabilities).*

*This wider umbrella more accurately portrays the State's dramatically shifting population profile, and each of the five demographic elements will have a profound individual, as well as interactive, impact on how the state agencies meet their future obligations. In addition, focusing on the wider demographic picture would lessen the inclination of many agencies to dismiss the single-issue analysis of "aging" as falling under the purview of a few specific agencies.*

A major objective of the initiative was to engage the 36 participating agencies in carrying out these steps *in concert* in order to raise their collective awareness of the shared commonality that exists among the agencies regarding the project's stated issue (preparing for the impact of the shifting demographics) and purpose (institute a new way of planning). The initiative was successful in increasing the agencies' realization of the extent to which the impact of one agency's policies and services are affected by, and have an effect on, the policies and services of the other agencies, as well as the extent to which an individual agency's policies and services could be positively reshaped through increased communication and collaboration with the other agencies. Through the Project 2015 initiative, the 36 agencies were guided through an unconventional framework that encouraged planning as a cohesive, unified entity.

The Project 2015 planning initiative was designed as a nine-month project. An initiative objective was for each agency to record the results of its internal scan, prioritization, and identification of action steps in an agency-specific brief, which would serve as a tangible basis for each agency to continue its planning process. A goal of the initiative was the compilation of the 36 briefs into a White Paper policy document to be widely distributed to serve as a basis for further, ongoing discussion among citizens and groups across the State, as well as to serve as a basis for subsequent activities under PROJECT 2015.

These subsequent activities would include: (1) agencies would discuss the contents of their briefs with their constituent groups (regional and community offices, line workers, and direct consumers of their services); (2) discussions regarding issues of mutual interest would be initiated among state government agencies to explore possible collaborative efforts in implementing recommended action steps included in the agencies' briefs; and (3) community forums would be held among the general public and general stakeholder groups (such as academicians, elected officials, community leaders, legislators, interest groups, etc.) to gather responses to the recommended action steps and gather additional input about the various

issues raised. Input received from the discussions and forums would help agencies revise and refine their recommended action steps.

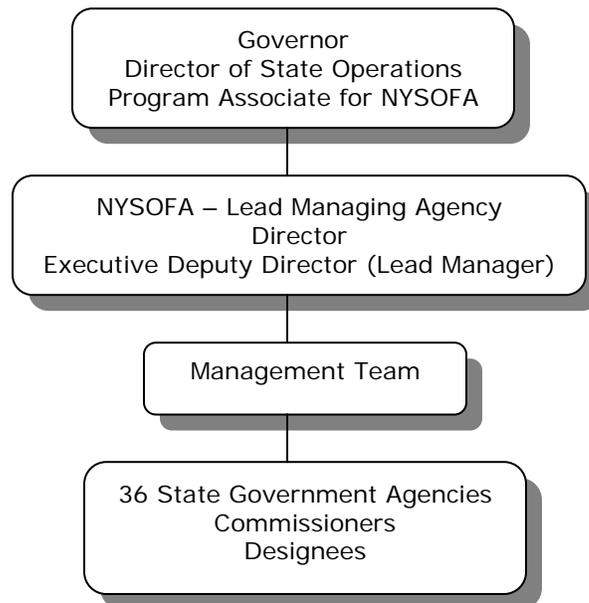
**GOAL:** *Through the initiative's initial and subsequent steps, the ultimate goal of Project 2015 was identified by the agencies themselves: to create an optimal fit between the goods and services provided by New York State government agencies and the needs and preferences of the people being served by those agencies.*

The major aspects of the nine-month Project 2015 initiative are described in the following sections. Participants' perceptions of the initiative's aspects, as well as insights identified by the Management Team that emerged throughout the implementation of the initiative, are included throughout the sections in indented italic text.

### Organization:

**Project 2015's Organization Chart** – The following chart portrays the overall organizational structure of Project 2015:

#### New York State – Project 2015 ORGANIZATION CHART



**Executive Leadership** -- The Governor, as the head of all state agency operations, identified the 36 agencies to be involved in Project 2015 and explicitly charged them with fully participating in the initiative and completing the assigned tasks within the scheduled time frame.

*The Executive's role in Project 2015 was a critical element ensuring the initiative's success. Initial and sustained cooperation of a large group of diverse, busy agencies could not be realized without the visible presence of the primary leadership office. For those replicating the model in other venues, the involvement of the relevant key leader (executive director, county executive, mayor, college president, Dean, Department Chief, CEO, etc.) is crucial to achieving initial and sustained commitment.*

Agencies were not given additional resources to carry out the work of Project 2015 but, rather, incorporated this added responsibility into their existing full schedules, using existing time and staff resources. While agencies were expressing the value of the project's activities and intent by midway into the project's time line, no tangible incentives were evident at the start of the initiative to encourage agencies to willingly engage in Project 2015, given their limited resources.

*Though agencies' Commissioners and project work staff agreed that they **do** engage in strategic planning, they typically do not look further out than three to five years, and they generally would not have addressed the impact of shifting demographics. Project 2015 placed aging, diversity, and other changing demographics within the agencies' priority planning areas.*

Agencies' Commissioners and Project 2015 work staff agreed that the directive by the primary executive office achieved engagement where little or none would have occurred in the absence of this charge.

**Managing Agency** -- The State Office for the Aging (NYSOFA) was assigned by the Governor as the managing agency to design the Project 2015 initiative and to assign work activities, product guidelines, and time lines. NYSOFA had two differentiated roles in Project 2015: (1) as the managing agency, NYSOFA was responsible for designing the initiative and for convening and leading the 36 participating agencies through the implementation process; and (2) as one of the 36 participating agencies, NYSOFA was responsible for completing the tasks and products required of each individual agency.

The tasks and responsibilities required for the two roles were assigned to two separate NYSOFA work teams, both of which incorporated their Project 2015 tasks into their existing work responsibilities: (1) the NYSOFA "Management Team," responsible for managing the overall Project 2015 initiative; and (2) the NYSOFA "Agency Team," responsible for completion of NYSOFA's agency-specific activities and written policy brief.

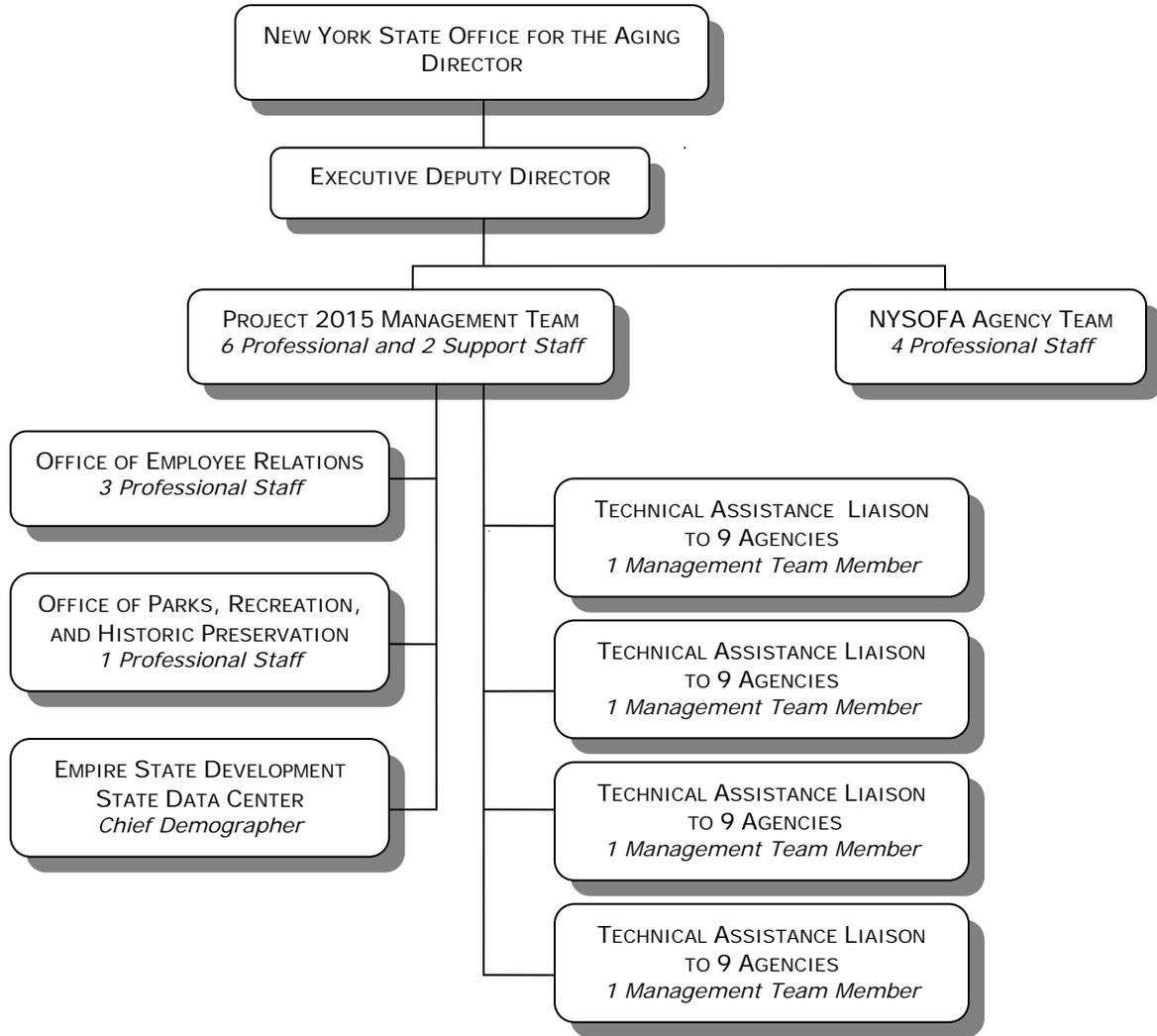
*Assigning two distinct work group teams in the lead managing agency resolved two significant challenges: (1) the substantial work load was spread among more individuals, and (2) the divergent goals and expectations characterizing each team's set of responsibilities would have created decision-making conflicts if lodged in the same set of workers.*

Both teams operated under the coordinating leadership of NYSOFA's Executive Deputy Director. Under a directive by NYSOFA's Director, the Executive Deputy Director assumed the dual roles of (1) lead manager for the overall initiative, responsible for overseeing the Project 2015 Management Team; and (2) NYSOFA's Project 2015 Designee, responsible for overseeing NYSOFA's Agency Team.

*Lodging both roles in one individual enhanced coordination of the disparate activities of the two work teams and made communication between the two teams more efficient under the initiative's tight time frame.*

**Managing Agency’s Organizing Framework** – The following chart portrays the organizing framework employed by the managing agency to implement the Project 2015 initiative:

**New York State -- Project 2015  
MANAGING AGENCY’S ORGANIZING FRAMEWORK**



**Management Team** – NYSOFA’s Executive Deputy Director selected six NYSOFA professional staff and two support staff to comprise the Project 2015 Management Team. One individual from the team was designated as the Project 2015 Lead Coordinator, who was responsible for the overall implementation of the initiative; and the team was accountable to the Executive Deputy Director. Individual members of the Management Team (both professional and support staff) were responsible for managing discrete components of the initiative’s activities and products, and regular weekly team meetings were used to maintain coordination of the progress of all

components. Four of the Management Team's professional staff members were each assigned as technical assistance liaisons to nine agencies.

The NYSOFA Management Team also enlisted support and resources from other participating agencies. Three professional staff from the Governor's Office of Employee Relations and one professional staff from the Office of Parks, Recreation, and Historic Preservation supplemented the NYSOFA Management Team to help with planning and facilitating the monthly state agency work group meetings. New York State's Chief Demographer, from Empire State Development's State Data Center, developed demographic materials on aging, migration, immigration, and diversity for use by the agencies in conducting their analysis and brief-writing. The Chief Demographer provided training to agencies in understanding the impact of the demographics and was available to agencies throughout the initiative for technical assistance. Additional support and resources for the initiative were provided by various other agencies and are listed in the Appendix, page 23.

*Involving other agencies achieved several important objectives: (1) it spread responsibility for project costs among several agencies, (2) it tapped existing resources and areas of expertise available in discrete agencies, and (3) it increased the level of commitment to the project among participating agencies and fostered a sense of collaboration in seeing the project through to successful fruition.*

## **Implementation:**

**Process Framework --** The NYSOFA Management Team designed a framework for the overall initiative, to facilitate communication and assure appropriate oversight of all work activities and products. The major elements of this framework included:

- The Governor charged the Director of State Operations (the person with administrative responsibility for supervising all the work of all the state agencies) with overall oversight of Project 2015.
- In New York State, each state agency is accountable to a Program Associate in the Governor's office, who reports directly to the Director of State Operations. The Governor's Program Associate for NYSOFA was assigned as the day-to-day liaison between the Governor's office and NYSOFA's Executive Deputy Director to provide direct oversight of all Project 2015 designs, activities, and products.

*Direct ongoing involvement of the Governor's key staff persons provided the necessary authority that enabled the lead managing agency to issue directions and expectations to its peer agencies and require that specified time lines be met.*

- Each agency's Commissioner was the agency's formal representative to Project 2015 and was present to receive the initial Governor's charge to engage the agency in the project.
- Each agency's Commissioner was directed by the Governor to assign responsibility for the agency's Project 2015 tasks and activities to a high-level staff person (termed the agency's Project 2015 Designee) who had sufficient authority to reassign work staff, adjust existing work schedules, and prescribe tasks and time frames to complete the required Project 2015 products.

*Completion of high quality work products in a fixed, tight time frame required that an individual within each agency be in charge whose authority could command the necessary realignment of resources. This is especially important in an environment of scarce resources (staff, time, and money).*

- Four of the Management Team's professional staff members were each assigned as technical assistance liaisons to nine agencies, to facilitate communication and provide individualized guidance and technical assistance in the most efficient manner. These pairings remained constant throughout the initiative's nine-month process.

*Maintaining a consistent pairing arrangement throughout the initiative for interactions between the agencies and the Management Team established a comfort level that encouraged communication and facilitated technical assistance discussions.*

**Appointing a Designee** -- The NYSOFA Management Team required each agency's Commissioner to submit a form specifying the name, title, and contact information for the high-level staff person appointed to be the agency's Project 2015 Designee. The Designee was responsible for:

- (1) determining which staff would be involved in carrying out the agency's Project 2015 tasks and activities;
- (2) overseeing the design of the process the agency would use to complete its required activities and products;
- (3) assuring rapid, responsive deployment of necessary resources;
- (4) overseeing each phase of the agency's Project 2015 activities and work products; and
- (5) approving all Project 2015 work products and achieving the Commissioner's sign-off.

*Having a senior staff person (the Designee) champion the project was an effective strategy that could be replicated*

*with similar projects in other venues. The authority of the Designee to approve or sign-off on completed work facilitated moving the process to each succeeding stage.*

Designees were required to participate in all Project 2015 state agency work group meetings and activities. Each agency's Designee served as the primary liaison between that agency and the NYSOFA Management Team, with all communications between NYSOFA and the agencies conducted through the Designees.

*Funneling all communications through one person (the Designee) assured that all directions, guidelines, and technical assistance were channeled to agencies' project workers in the most time-efficient manner, assured that directions to workers always came from the same internal-agency source, and assured that the Designee, as an agency's lead staff, received all information needed for well-organized coordination of activities.*

Commissioners selected Designees on a variety of bases: (1) some were members of the executive staff in the agency's policy and planning divisions; (2) some were Assistant Commissioners; (3) some were selected because their existing job descriptions included handling special projects or heading *ad hoc* committees; (4) some Designees, because of the initiative's tight time frames, were selected because of distinct criteria or abilities, such as their authority to sign off on products or reallocate staff resources, their ability to meet deadlines, their past successes on similar projects, or their excellent technical and/or writing skills; and (5) some were selected because their seniority status provided a resource for the agency's "institutional knowledge/memory," which added a level of practicality and historical context for the analysis and action steps necessary to complete the agency's policy brief.

(6) Others were selected because of intangible qualities that a Commissioner felt would facilitate the agency staff's willingness to engage in the new initiative. These included such traits as trustworthiness, leadership capabilities, ability to work well in a team endeavor, or the high regard the person enjoyed among staff throughout the agency. (7) For smaller agencies, scarcity of agency staff influenced the selection of the Designee; however, the constraint of limited staff did not prove to be a major barrier to completing the required work. Generally, in the small agencies, the Commissioner maintained ongoing direct involvement in the Project 2015 activities and work products, working through the Designee, who (regardless of position) had frequent contact with the Commissioner, exchanging information and decision-making on a regular basis.

**Structured Implementation** -- The Project 2015 Management Team organized the agencies around the unifying, common theme (planning for the impact of the State's dramatically changing demographic profile) and designed a structured process to guide the agencies, as a group, through the activities necessary to complete the required written product (agency brief). The major process steps included:

- A kick-off meeting was hosted by the Governor's office to launch the initiative. At this meeting, Project 2015 was described and the Governor charged the 36 Commissioners to engage their agencies in the initiative.
- A Project 2015 work plan specifying all major activities and deliverable products, with due dates, was created for use by all agencies to assure completion of the written policy document within the Governor's specified nine-month time frame (work plan: see page viii; initiative's time line: see Appendix, page 29).
- Each participating agency was required to develop an agency-specific work plan, and these were submitted to the NYSOFA Management Team within the first month of the initiative.
- Monthly state agency work group meetings were designed and conducted by the Management Team for the entire group of participating agencies, to provide consistent guidance and instructions to all agencies, to help in adhering to the task-completion schedule, and to establish a unifying bond among all participating agencies.
- Throughout the project, directions, technical assistance, and other communications between NYSOFA and each participating agency were provided via email, direct mail, and telephone, and at the monthly work group meetings.
- Each participating agency wrote an agency-specific policy brief. The Management Team divided the writing of the policy briefs into three stages, with specified due dates, and guided the 36 agencies through the analysis, prioritization, and strategizing required to develop these briefs.
- The Management Team oversaw the writing of four articles to accompany the 36 agency briefs and assembled the articles and briefs into one policy document (the White Paper).
- The Governor's office reviewed the completed policy document, and NYSOFA published the White Paper.
- The nine-month Project 2015 initiative culminated with a Governor's Project 2015 Symposium for agency Commissioners, Designees, and work staff.

- At a pre-symposium breakfast, Commissioners presented the published White Paper to the Governor's office.
- At the Symposium, Commissioners, Designees, and staff from the participating state agencies discussed strategies for taking next steps to further the aims and goals of Project 2015.
- NYSOFA distributed the White Paper to state legislators, libraries, governors and state units on aging across the country, federal agencies, and a wide range of interested individuals and organizations.

**Agency-Specific Work Plans** – The first product required of each agency by the NYSOFA Management Team was the agency-specific work plan, which served as a management tool for the agency to complete the necessary Project 2015 tasks and products within the allotted time frames.

*Developing a work plan as a first deliverable product forced agencies to quickly establish a Project 2015 work team and to immediately develop the logical sequence of all activities and work tasks necessary to complete the required products.*

Each agency's work plan specified (1) the agency's staff assigned to work on the initiative, (2) departments, groups, or individuals who would be involved in the analysis and planning discussions, (3) specific activities and steps the agency would engage in to carry out the necessary tasks for the project, and (4) the agency's time line for completing each aspect of the agency's internal Project 2015 process. The agency's internal due dates for completed products reflected the Project 2015 due dates that had been stipulated on the Project 2015 work plan established by the NYSOFA Management Team and provided to the Commissioners at the initiative's kick-off meeting.

*Each agency was able to complete and submit a work plan within the first month of the project's initiation, as was required. This assured an efficient, timely start on the project by each agency, kept all agencies on a consistent schedule, and minimized the natural tendency for time-slippage that could occur throughout such an initiative.*

**Structuring the Work** – Several elements of the Project 2015 initiative were standardized, such as designating a high-level agency-specific project Designee, requiring attendance at group meetings by all 36 agencies, specifying the demographic basis for agencies' analysis and planning, and formatting of the work products. However, no prescriptive directions were given to the agencies about how each should allocate its internal resources or

structure its internal process to carry out the activities and complete the work products for Project 2015. The individual agencies varied in how they organized, supervised, and carried out these activities, and the type of implementation model used was related to the size of the agency.

*Overall standardization assured consistency in project goals among all agencies and adherence to the project's intent, themes, and time frames. Giving self-determined responsibility to each agency for implementation allowed each to design a working and decision-making structure that best fit its own unique characteristics and resources.*

While some agencies modified their implementation methods during the process in order to meet changing internal circumstances within the agency, several distinct implementation models emerged:

#### MEDIUM – LARGE AGENCIES:

- *Representational Decision-Making Model:* In this model, the Designee convened a work group team that included staff from a cross-section of the agency's departments or divisions. In a similar model, the Designee asked division/department heads to solicit volunteers from their divisions/departments to staff the work group team. These models allowed for greater diversity in who participated in the Project 2015 analysis and planning process. A democratic decision-making method, involving all team members, was used in these work team models.
- *Representational Input Model:* Some agencies enlisted the participation of a cross-section of agency staff who were not members of the decision-making team, but who provided content expertise and a context for decision-making by the senior staff members who comprised the work team.
- *Senior Staff Decision-Making Model:* In this model, Designees selected a group of division or department heads to constitute the work team, with selections based upon the division's or department's perceived logical link to the intent of the Project 2015 initiative. This work team of senior staff was solely responsible for decision-making.

#### SMALLER AGENCIES:

- *Sole Participant Model:* The staff-reallocation strategies that large agencies used to carry out Project 2015 were not always a viable option for small agencies. A model often used by these smaller agencies entailed the Designee taking full responsibility for completing the required activities and products, with various agency staff informed and providing input and feedback to the Designee via email. This model removed a

layer of “bureaucracy” from the process, which was particularly useful because of limited staff resources and the project’s tight time frame.

*Regardless of the implementation model used, each agency effectively participated in all Project 2015 group activities and successfully completed all products within the stated time frames.*

**Policy Briefs** – The written policy brief required of each agency was meant to reflect the agency’s analysis and strategic planning completed for Project 2015. The extent to which each agency had previously engaged in “future-based” strategic planning varied. Several agencies, because of the nature of their responsibilities, routinely plan their activities, services, and products based upon demographic and economic projections. Some of these agencies, prior to the initiation of Project 2015, had already engaged in activities that focused on trends related specifically to the *aging* of the State’s population and, with Project 2015, expanded this previous work to include the additional demographic shifts related to immigration, migration, diversity, and disability. Other agencies, which generally develop services and programs based upon assessments of current issues and problems and upon existing service-implementation modalities, had to amend their planning processes to include future-based strategic planning around the expected demographic shifts identified for Project 2015.

To accommodate the variation in experience among agencies and to achieve a level of cohesiveness among the policy briefs, the Management Team separated the development of the briefs into three parts, three time periods, and three due dates. The standardized set of questions and instructions that formed the basis for each part, as well as the tri-part writing schedule, facilitated the organization of the 36 individual work products and guided the agencies through a structured process that resulted in a coherent assembled final policy document (the Project 2015 White Paper).

To develop their policy briefs, agencies’ work teams were required to engage in three activities: (1) using the demographic trend information on aging, immigration, migration, and diversity provided by Empire State Development’s State Data Center, assess the impacts of these demographic trends on their own agencies, (2) prioritize the issue areas that were identified through the assessment of the impacts, and (3) develop recommendations and action steps for their agencies to address these issue areas. The standardized questions underlying these activities and forming the basis for writing the agencies’ briefs were:

For Part I – *Internal Scan*:

- Consider the impact of the State’s changing demographics on your agency. What are your agency’s overarching policy issues,

direction, program considerations, changing constituency needs, and management issues related to these changing demographics?

- Some agencies may already have begun to address the impact. If yours has done so, please describe what your agency currently is doing to address or respond to these anticipated changes.

For Part II – *Prioritization Results*:

- Designees were instructed to prioritize the overarching policies, directions, programs, constituency needs, and management issues discussed in Part I; select *up to three* of the top priority items; and record them for the second part of the brief, together with a rationale for selecting these items.

For Part III – *Response Plans and Outcome Indicators*:

- What recommended actions could your agency take in the next five to seven years to address the priorities you have identified that reflect the impact of the anticipated demographic changes? Also, consider collaborative approaches among state agencies and how such collaborations fit into the overall state planning process.
- What are several goals (outcomes) you expect to achieve through your recommended actions?

A standardized format was required for agencies to use in writing the briefs. Each agency's brief could be no longer than eight double-spaced pages. Abbreviations and acronyms had to be spelled out the first time used. Formatting for footnotes, font type and size, and margin sizes were defined. Headings and subheadings were specified. In addition, Part I was to be written in narrative form, with minimal use of bulleted phrases, tables, and graphs, and had to include a brief statement defining the agency's mission. Part II could include no more than three of the top priority issues selected from those discussed in Part I. For Part III, a designated formatting template had to be followed—each priority issue listed in Part II was to be very briefly restated, with the relevant action step(s) specified immediately following the issue it was meant to address, together with the outcome(s) or result(s) that was expected from the action step.

*Limiting the page length required agencies to articulate clearly and concisely and to focus on the **key** issues. Each agency's brief can stand alone as a basis for discussion and action. However, an intent of Project 2015 was to compile all 36 briefs into one policy document (White Paper) that would (1) provide a practical basis for next steps within and across state agencies and*

*(2) provide an organized policy framework for discussions among community citizens, leaders, and groups. Limiting the page length kept the White Paper to a manageable size for readers. Standardization was used as a tool to create ease of readability and comparability across all briefs for readers.*

**White Paper** – The agencies’ briefs were the major written products from Project 2015. In order to facilitate sharing the content of all the briefs with a wider audience, the Management Team assembled the 36 briefs into one policy document, *Project 2015: State Agencies Prepare for the Impact of an Aging New York: White Paper for Discussion*, which was widely distributed.

Four supplemental articles, written by professionals with specific expertise, were included in the White Paper as a preface to the briefs: (1) an *Introduction* written by the Director of NYSOFA, which provides a brief history of Project 2015, explains the 2002 planning initiative, and describes the content of the White Paper; (2) *The Face of New York: The Numbers*, written by the State’s Chief Demographer, which provides a statistical picture of New York’s anticipated demographic changes; (3) *The Face of New York: The People* written by a university-based sociologist, which provides a sociological overview of the State’s future demographic profile; and *An Analysis and Summary of 36 State Agency Briefs* written by a NYSOFA senior policy analyst, which categorizes the overarching themes and cross-cutting topic areas that emerged from agencies’ analyses of issues, and summarizes the action steps and collaborations identified by agencies as strategies for addressing the issues.

The Commissioners of the participating agencies formally presented the White Paper to the Governor’s office at a breakfast held immediately preceding the Governor’s Symposium.

**Symposium** – The nine-month planning initiative culminated in a Governor’s Symposium for the Commissioners, Designees, and work staff of the 36 participating agencies.

There were several purposes for this day-long event: (1) to provide a formal opportunity for the Governor’s office to acknowledge the work accomplished by the agencies throughout the initiative and to thank them for the outcome of their efforts, (2) to provide a formal opportunity for the Governor’s office to give all participants an overview of the contents of the White Paper and to respond to the agencies’ analyses and action steps, (3) to provide training to the Designees and work staff on effective strategies for turning their strategic planning steps into concrete actions, and (4) to provide training to the Designees and work staff on effective ways of

engaging their constituency groups and the wider community in discussions based on their planning work.

During the Symposium, two demographers presented projections of the State's demographics to underscore the need for agencies to continue the work they had begun through the Project 2015 initiative, and a representative from the National Governor's Association discussed activities related to the aging of the population being conducted in other states.

## Participants' Perceptions of Project 2015

Through the interviews and focus group meetings conducted by the Center for Excellence in Aging Services, Commissioners, Designees, and agency work staff reported their perceptions of various aspects of the Project 2015 initiative. These are included in this Guide for those who wish to replicate or adapt this planning process. Some perceptions are woven into the text of the Guide and others are discussed below.

Commissioners and Designees were asked to identify which components of the initiative they found to be the most and least challenging. Their responses covered a substantial number of individual elements, but no one element was specified by enough participants to warrant its modification or reconsideration as an element of the initiative. Participants' reactions to individual elements were mixed (both negative and positive), much of which was related to variations characterizing the participating agencies (size, resources, past planning experiences, traditional priority areas, types of products and services provided, etc.).

*Since responses were so varied among participants and addressed numerous individual factors, those implementing an initiative similar to Project 2015 should incorporate a technical assistance component that can respond individually and quickly to participants as discrete issues and problems emerge.*

Participants' perceptions of the project itself were overwhelmingly positive. They reported that, as the initiative progressed, they found themselves thinking "outside the box" in a manner they had not done in the past about the mission, products, and functioning of their agencies with regard to shifting demographic trends.

Many reported that they had not *initially* realized the significant impact that these trends would have on their agencies—that if they had had a better understanding of the impact, they would have embraced the initiative from the beginning. By engaging in the initiative, they came to feel that because the aging and increasing diversity of the state's population is inevitable, "becoming aging-prepared" and "understanding the nuances of the state's diversity," are laudable goals for government agencies and reflect good business practices.

Many agencies' staff did not recognize the extent of commonality in issue areas that existed among the different agencies and appreciated that the initiative increased their awareness of the potential nontraditional collaborations that are possible and the mutual benefits arising from such shared efforts.

Interviews with Commissioners and Designees took place mid-way through the Project 2015 initiative. At that point, most felt that it was too early to assess whether Project 2015 would result in a permanent difference in how planning and program development will take place in their agencies. However, (1) there was an expressed concern that the project would become just another well-intentioned initiative that is never fully implemented; and (2) there was general agreement that the project needs to be kept alive, to take on a life of its own, and become institutionalized as a way of planning and doing business.

Participants suggested the following as a means of achieving an internalized sensitivity to the importance of planning around the critical issues agencies identified through the project: (1) awareness about aging and changing demographics must be raised throughout their agencies, (2) agencies must take concrete steps to follow through with the action strategies provided in their briefs, and (3) a plan must be created for bringing the discussion concerning Project 2015 issues and strategies to consumers, organizations, and leaders in the outside community.

There was general consensus among participants that the project's overall organizational structure was an appropriate one, including the primary leadership by the Governor's office, the designation of NYSOFA as the most logical lead agency to manage the project, and the appointment of a high-level project Designee within each agency.

One aspect of the initiative was a source of discussion throughout the initiative—very clearly, agencies wanted a more flexible time frame in order to re-visit and revise the individual parts of their written briefs. As Project 2015 evolved and agencies learned more about the topics, there was a natural desire to use what they had learned when completing subsequent parts of the brief to return to previously submitted parts for additional analysis and revision.

There was also a general desire to use a more inclusive process for gathering input from a larger body of agency staff members, consumers, and external constituent groups in the development of the brief, which the tight time frame did not allow. However, by the end of the initiative, there was general consensus among participants that the tight time frame was successful in achieving the intent of the Project 2015 initiative and that extending the initiative's time period would not have added significantly to the quality of the briefs and would have added little to the outcome of the initiative. In fact, several participants indicated that the tight time frame was *needed* as a means of keeping the agencies focused on the project's work and keeping the initiative on track.

## PROJECT 2015 – A LIVING PROCESS

**Post-Symposium** – As stated at the beginning of this Guide, the planning initiative described in the Guide was one in a series of activities in New York implemented under the rubric of “PROJECT 2015.” All these activities were intended to increase attention on the dramatically changing demographics in New York State and to engage leaders and citizens across the State to prepare to both meet the challenges and take advantage of the benefits associated with these changes. Following the Governor’s Symposium, Project 2015 activities have continued. For example:

- State agencies have begun implementing their stated action steps, educating all their agency staff about the projected characteristics of their constituencies and clients, and employing various efforts to engage in discussions with other state agencies and those outside of government. In its continuing role as manager/coordinator for the planning initiative, NYSOFA will track the progress of these activities and will facilitate the creation of collaborations among various agencies.
- The State Office for the Aging has taken steps to train its network of 59 county-based Area Agencies on Aging about Project 2015 and to encourage each Area Agency to proactively begin a similar planning initiative in its own community. NYSOFA has formed a partnership with the New York State Association of Area Agencies on Aging and the New York State Coalition on Aging to (1) create a packet of training materials for use in educating Area Agency directors and staff about Project 2015, (2) create materials for use by the Area Agencies to educate their county government and agency leaders about the demographic changes specific to their own communities, (3) provide training at a statewide conference and at regional meetings, and (4) provide the Area Agencies with ongoing technical assistance as they implement a replicated or adapted version of the Project 2015 planning initiative within their counties or on a regional basis.
- Both publications (*Project 2015: The Future of Aging in New York State: Articles and Briefs for Discussion* and *Project 2015: State Agencies Prepare for the Impact of an Aging New York: White Paper for Discussion*) continue to be used by college and university classes across the state as a basis for classroom discussion.

**Why Replicate Project 2015** – New York’s communities are not alone in experiencing profound shifts in the make-up of their resident populations. The populations of communities, states, and countries across the world are aging, and all are experiencing a change in the proportion of younger-aged citizens relative to the proportion of older citizens. 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 both the diversity of many states' populations and the number of residents who speak little or no English. 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.).

An analysis of the Project 2015 initiative found that 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. New York's planning initiative can be replicated or adapted by other governments or communities that wish to accomplish these same goals.

## APPENDIX

### PROJECT 2015 Publications

This Guide is one publication in the series listed below that were developed through PROJECT 2015 initiatives and that are available for public distribution:

***Project 2015: The Future of Aging in New York State: Articles and Briefs for Discussion*** (2000): 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): 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.

***Project 2015: State Agencies Prepare for the Impact of an Aging New York: White Paper for Discussion*** (2002): published by the New York State Office for the Aging. It is a compendium of several introductory articles and the 36 policy briefs developed by the state government agencies that participated in the Project 2015 initiative described in this Guide.

***Project 2015: Population Characteristics by County*** (2002): 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: United States – States' Activities to Prepare for the Impact of an Aging Population*** (2002): developed as a joint effort by the Albany (New York) Law School and the New York State Office for the Aging as a companion document to the *Project 2015: State Agencies Prepare for the Impact of an Aging New York: White Paper for Discussion*. It provides a description of activities addressing the impact of the aging of the population, which have been implemented through 2002 by other states across the country.

## Project 2015 Participating State Agencies

The following cabinet-level government agencies were selected by the Governor to participate in the Project 2015 planning initiative:

<p><b>Office of Advocate for Persons with Disabilities</b> Richard Warrender, State Advocate Lisa Rosano, Project Designee</p>
<p><b>Office for the Aging</b> Patricia Pine, Director Neal Lane, Project Designee</p>
<p><b>Department of Agriculture and Markets</b> Nathan Rudgers, Commissioner David Fellows, Project Designee</p>
<p><b>Office of Alcoholism and Substance Abuse Services</b> Paul Puccio, Executive Deputy Director Robert Bruno, Project Designee Robert Higgins, Coordinator of Senior Services</p>
<p><b>Banking Department</b> Elizabeth McCaul, Superintendent Annah Perch, Project Designee</p>
<p><b>Division of the Budget</b> Carole Stone, Director John Cape, Project Designee</p>
<p><b>Office of Children and Family Services</b> John Johnson, Commissioner Susan Somers, Project Designee</p>
<p><b>Department of Civil Service</b> George Sinnott, Commissioner Nancy Kiyonaga, Project Designee</p>
<p><b>Consumer Protection Board</b> May Chao, Chairperson Corinne Biviano, Project Designee</p>

<p><b>Department of Correctional Services</b>  Glenn Goord, Commissioner  John Patterson, Project Designee</p>
<p><b>Council on Children and Families</b>  Alana Sweeney, Executive Director  Deborah Benson, Project Designee</p>
<p><b>Education Department</b>  Richard Mills, Commissioner  Robert Cate, Project Designee  Robert Gumson, Manager, Independent Living Centers</p>
<p><b>Empire State Development</b>  Charles Gargano, Chairman  Amy Schoch, Project Designee  Katherine Loucks, Project Designee</p>
<p><b>Governor's Office of Employee Relations</b>  George Madison, Director  Craig Dickinson, Project Designee</p>
<p><b>Department of Environmental Conservation</b>  Erin Crotty, Commissioner  Mary Kadlecek, Project Designee</p>
<p><b>Office of General Services</b>  Kenneth Ringler, Jr., Commissioner  Nita Chicatelli, Project Designee</p>
<p><b>Department of Health</b>  Antonia Novello, Commissioner  Neil Benjamin, Project Designee</p>
<p><b>Division of Housing and Community Renewal</b>  Judith Calogero, Commissioner  Elizabeth Roetter, Project Designee</p>

<p><b>Insurance Department</b>  Gregory Serio, Superintendent  Karen Cole, Project Designee</p>
<p><b>Department of Labor</b>  Linda Angello, Commissioner  Regina Morse, Project Designee</p>
<p><b>Office of Mental Health</b>  James Stone, Commissioner  Keith Simons, Project Designee</p>
<p><b>Office of Mental Retardation and Developmental Disabilities</b>  Thomas Maul, Commissioner  Lisa Kagan, Project Designee</p>
<p><b>Department of Motor Vehicles</b>  Raymond Martinez, Commissioner  Gregory Kline, Project Designee</p>
<p><b>Office of Parks, Recreation and Historic Preservation</b>  Bernadette Castro, Commissioner  Peter Gemellaro, Project Designee</p>
<p><b>Department of Public Service</b>  Maureen Helmer, Chairman  Ronald Cerniglia, Project Designee</p>
<p><b>Commission On Quality of Care for the Mentally Disabled</b>  Gary O'Brien, Commissioner  Mindy Becker, Project Designee</p>
<p><b>Office of Real Property Services</b>  Thomas Griffen, Executive Director  James Dunne, Project Designee</p>
<p><b>State Emergency Management Office</b>  Edward Jacoby, Jr., Director  Catherine Lowenski, Project Designee</p>

<p><b>Division of State Police</b>  James McMahon, Superintendent  Preston Felton, Project Designee</p>
<p><b>State University of New York</b>  Robert King, Chancellor  Craig Billie, Project Designee</p>
<p><b>Department of State</b>  Randy Daniels, Secretary of State  Keith Stack, Project Designee</p>
<p><b>Department of Taxation and Finance</b>  Arthur Roth, Commissioner  Deborah Dammer, Project Designee</p>
<p><b>Office for Technology</b>  William Pelgrin, Executive Deputy Commissioner  Nancy Mulholland, Project Designee</p>
<p><b>Office of Temporary and Disability Assistance</b>  Brian Wing, Commissioner  Lorraine Noval, Project Designee</p>
<p><b>Department of Transportation</b>  Joseph Boardman, Commissioner  Gayle Burgess, Project Designee</p>
<p><b>Division of Veterans' Affairs</b>  George Basher, Director  Harvey McCagg, Project Designee</p>

## Participating Agencies That Provided Support for Project 2015

The following participating agencies provided a variety of resources and other support to the Project 2015 initiative:

<b>Office for the Aging</b>	Provided underwriting for Management Team staff and nonpersonal services; developed written materials; provided workshop facilitation.
<b>Empire State Development</b>	Provided demographic information and materials; conducted training.
<b>Department of Correctional Services</b>	Formatted and printed five Braille copies of the Project 2015 White Paper.
<b>Office of General Services</b>	Provided underwriting for space accommodations for the Project 2015 Symposium.
<b>Department of Taxation and Finance</b>	Printed the first run (2,000 copies) of the Project 2015 White Paper.
<b>Governor's Office of Employee Relations</b>	Provided workshop facilitation and training; developed materials.
<b>Office of Parks, Recreation and Historic Preservation</b>	Provided workshop facilitation and training; developed materials.
<b>Office for Technology</b>	Provided assistance with technology needs for the Project 2015 Symposium.
<b>Office of Advocate for Persons with Disabilities</b>	Printed Braille copies of Project 2015 meeting materials.

## Project 2015 Principals and Management Team

### **Governor's Office**

George Pataki, Governor  
James Natoli, Director of State Operations  
Mark Kissinger, Program Associate

### **New York State Office for the Aging**

Patricia Pine, Ph.D., Director  
Neal Lane, Executive Deputy Director

### **Project 2015 Management Team**

#### **New York State Office for the Aging**

Jennifer Rosenbaum (Lead Coordinator)  
Vera Prosper, Ph.D.  
Florence Reed  
Andrea Hoffman  
Elaine Richter  
Laurie Ann Sprague  
Barbara Short  
Chris Reilly

#### **Governor's Office of Employee Relations**

Deborah Berg  
Maureen Nyilis  
Katy Jordan

#### **Office of Parks, Recreation and Historic Preservation**

Janice Fontanella

### **University at Albany, State University of New York**

#### **School of Social Welfare**

#### **Center for Excellence in Aging Services**

Philip McCallion, Ph.D.  
Denise N. A. Bacchus, Ph.D.

**TIME LINE of ACTIVITIES (2002) --- Project 2015: State Agencies Prepare for the Impact of an Aging New York**

<i>Major Activities</i>	<i>Dec.</i>	<i>Jan.</i>	<i>Feb.</i>	<i>Mar.</i>	<i>Apr.</i>	<i>May</i>	<i>June</i>	<i>July</i>	<i>Aug.</i>	<i>Sept.</i>	<i>Oct.</i>
<b>NYSOFA designated as lead/managing agency</b>											
<b>NYSOFA Management Team selected</b>											
<b>36 participating state agencies selected</b>											
<b>Kick-off meeting: charge given by Governor</b>											
<b>Technical assistance provided by NYSOFA</b>											
<b>Agencies' Designees selected</b>											
<b>Agencies' work plans completed</b>											
<b>State agency work group meetings</b>											
<b>Brief Part I developed and submitted</b>											
<b>Brief Part II developed and submitted</b>											
<b>Review of Briefs I &amp; II by Governor's office</b>											
<b>Brief Part III developed and submitted</b>											
<b>Supplementary articles for White Paper developed</b>											
<b>Review of Brief Part III by Governor's office</b>											
<b>Briefs' analysis/summary completed for White Paper</b>											
<b>Briefs/articles/summary assembled for White Paper</b>											
<b>White Paper reviewed by Governor's office</b>											
<b>White Paper formatted and published by NYSOFA</b>											
<b>Governor's Project 2015 Symposium</b>											

