



The Our American States podcast—produced by the National Conference of State Legislatures—is where you hear compelling conversations that tell the story of America’s state legislatures, the people in them, and the policies, process and politics that shape them.

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How States Are Planning for an Aging Population | Dec. 19, 2021 | OAS Podcast 148

Ed: Hello and welcome to “Our American States,” a podcast from the National Conference of State Legislatures. This podcast is all about legislatures: the people in them, the policies, process and politics that shape them. I’m your host, Ed Smith.

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Those are the voices of Holly Riley, the aging services coordination director for Texas Health and Human Services, and Jarett Hughes, a senior policy advisor on aging for the Governor of Colorado. They’re my guests on the podcast.

The U.S. population is aging. In a little more than a decade, people 65 and older will outnumber children. Those older adults face economic, social and other challenges including the need for an array of long-term services.

Policymakers in a number of states are considering comprehensive approaches to support older adults. A few states have created what are termed master plans for aging that outline how the state can take on challenges in housing, transportation, healthcare, and other sectors.

My guests discuss how their states have responded, how they’ve tried to get key groups to work together, and some of the lessons learned over years of developing their state plans. Here’s our discussion.

Holly and Jarett, welcome to the podcast.

Holly: Thank you.

Jarett: Happy to be here. Thanks, Ed.

Time Marker (TM): 02:04

Ed: Well, thanks to both of you for coming on the show to talk about the efforts in your states to develop and implement comprehensive plans for your aging population. To start, I wonder if each of you could tell us about how the effort began in your state and whether it was a legislative or executive initiative, and who took the leadership role, or maybe more than one person took the leadership role. Holly, why don't we start with Texas? How did you guys handle it?

Holly: Our efforts actually began in 1998 when then the Texas State Unit on Aging launched our Aging Texas Well initiative, and its design is to help Texans prepare for aging, aging-related issues and aging-related needs.

Then in 2005, Aging Texas Well was formalized via an executive order that had six mandates for our state to undertake including assessing state readiness, reviewing state policy, helping build local capacity, and developing partnerships. All of these efforts are also mandated to be defined in a strategic working plan, which is our master plan on aging. And that is shared biennially with the Governor and the legislature.

So, there are a few people involved in its development, its collaboration, and its leadership.

TM: 03:26

Ed: Well, as most good things are, there's collaboration in working across silos, so that makes a lot of sense. Jarett, what kind of path did you take in Colorado to come up with planning?

Jarett: Here in Colorado, we had a legislative initiative in 2015, House Bill 151033, to create a strategic action planning group on aging. The real intent there was to take what I would say is a nontraditional approach to looking at aging and trying to move beyond the narrative of fragility and poverty and decline I think is common. And so, we really tried to take a proactive approach and looked comprehensively across issues and really take a life-span perspective as we approached it.

We were fortunate enough to have our current Lieutenant Governor, Dianne Primavera, run the bill when she was in the House back in 2015, so we've been able to have some continuity in that work for the last six years.

TM: 04:30

Ed: Well, Jarett, let me stay with you for a minute. As you suggest and as I've read, you need to coordinate across a lot of different policy areas. We all know that that's not always the easiest thing in the world to do. So, I wonder how did you folks in Colorado approach that, and what were the key groups that you had to get working together, talking together to make all this come together?

Jarett: I think collaboration, you mentioned it earlier, will probably be a key theme throughout the conversation. We really had on the front end a strong coalition of folks including AARP Colorado,

Bell Policy Center, Denver Regional Council of Governments, and our state association of area agencies on aging that came together to initiate and kick the work off.

That was just kind of a starting point and I think one of the components that we've tried to be very conscious of is the need to work horizontally across state agencies, but also the necessity to work vertically with local governments, the nonprofits and our private sector, because as you say, it's not easy to focus on workforce development and transportation planning and health and human services and all of these broad and dynamic interrelated issues, but in the structure of creating the Strategic Action Planning Group on Aging, which was a state board or commission if you will, we were very intentional about having state agency designees; then also very intentional about having designees from different sectors that could really help inform and help develop what we would consider a comprehensive and integrated approach.

But it takes a lot of relationship building and that takes time, so I think the importance of relationships and collaboration cannot be overstated.

TM: 06:18

Ed: Holly, what's your perspective from Texas? Was that a similar kind of exercise of getting a lot of different people, both from maybe the private community and government together?

Holly: We definitely have similarities there for sure. Our agency, Texas Health and Human Services Commission, administers a large array of health and human service programs including Medicaid, mental/behavioral health services, older Americans act programming; we are the state unit on aging; we have regulatory licensing. Those are just a few of the things we do in HHSC. And being in one agency really makes it a lot easier for us to connect with the policy areas that have input in our plan.

Also, one of the mandates in the executive order establishes our Aging Texas Well Advisory Committee that is made up of subject matter experts from across the state, and they're really great at connecting us with external policy specialists, stakeholders like AARP Texas, which provide input on our plan's development. And then our advisory committee itself also has contributions to the plan by providing their own priorities and recommendations.

One of the harder aspects is getting program areas that don't normally consider themselves part of aging services to see how their efforts intersect with and influence aging policy. And the broader awareness and understanding of social determinants of health has really helped with bringing others on board. Once you're able to show people how their service program connects with aging services, it's much easier to get their participation.

TM: 08:08

Ed: Holly, let me stay with you for a minute. I know that you've got a very thorough, detailed plan down there. Let's talk a little bit into the details. What are the priorities? What are the key things you're trying to achieve for your older population there in Texas?

Holly: Well, we've had kind of a long trajectory with this. As I mentioned, the executive order mandates a biennial strategic working plan that guides our efforts. Over the years, it's moved

between various oversight offices and the strategic focus that was the foundation of Aging Texas Well got a little lost in transitions, and the plan kind of became a call and response to the mandate that we had established. So, here's the mandate, here's what we're doing to meet the mandate.

We were really inspired by other states' master plans to reassess ours and look into its relationship to other strategic plans in our organization to ensure that we didn't have redundancies and that there is value in our plan, really bringing it back to the focus of strategic planning and readiness.

With our 2023 plan – this is kind of a relaunch for us – we took a step to be more inclusive with our strategizing. We surveyed older adults, their family caregivers, the aging service provider network to identify what their current and anticipated needs are. Their top responses became our priorities in our plan. Then we overlaid the executive order mandates to those priority areas to ensure that we were doing what we're charged to do.

Some of the priority needs that we heard included from older adults. They're concerned about their current and future fiscal health, having opportunities to engage with each other, social connection, and the ability and availability of local services and supports. And then caregiver priorities highlighted their concerns of their mental and physical health, current and long term, and the challenges of balancing caregiving with their work duties.

And then for the service providers, the administrative and policy issues that are impacting them focused on funding, staffing... there are some big surprises... and the ability to address social isolation, food insecurity and transportation issues.

So, we gathered those priorities, and they became the priorities for our master plan. And then we reached out to that large array of programs across our agencies to identify their strategies in addressing this.

TM: 10:54

Ed: Many of those priorities that you're mentioning have really been exacerbated with the pandemic, things like social isolation and that sort of thing, so that's interesting to see how those dove tail.

Jarett, I know the strategic action plan on aging in Colorado is also a pretty deep dive into these issues, and I wonder what you see as the priorities and key goals there and how you see things going in your state.

Jarett: One of our overarching priorities in putting those documents together, and I think it kind of helped lead our strategic thinking and planning, was really trying to take this age-positive approach to the work and look at our shifting demographics as an opportunity versus being something that we really had to react and respond to in a negative way or a resource-scarcity perspective, if you will.

We really have tried to frame this in a way that older adults bring so much wisdom and knowledge and resources to their communities and how can we kind of integrate them into

problem solving not only at the state level, but also locally and at the community level where a real impact happens.

So, I think more specifically, right now we're really prioritizing a few key areas and those include addressing health disparities and focusing on social determinants of health, as Holly mentioned, and we do that through state policy, but we also try to do that through supporting age-friendly and livable community work through the model laid out by AARP and the World Health Organization that really supports access to those key domains of livability, which I think significantly overlaps with social determinants of health.

Also, we're very intentional about the reality that we have to make strategic investments in our aging network and within our area agencies on aging. We have to make capital infrastructure investments, we have to try new, emerging technology and pilot demonstration projects, and other types of creative, proactive investments that allow us to use our resources in a more efficient way.

One of the other key priorities within all of this work has been workforce development. There are two pieces to that. We have focused a lot on our direct care workforce. We know that right now, not only in Colorado, I'm sure Texas the same way, but across the country, we are having a direct care worker crisis. That is one of the areas that we are working on probably more tirelessly than any at the moment.

But on the flipside of that there is a reality that our labor force is aging. We need to have business places and employers and policies in place that support older adults, whether or not they are caregiving for grandchildren or caregiving for a spouse, but really making sure that we can use that experience and that work history for the betterment of our economy overall.

And then I think the last two pieces Colorado is really focused on at the moment are really supporting retirement security and investment. We created a Colorado secure savings program through our state treasurer and that gives folks access to an IRA-type retirement plan in the private sector whose employers do not offer it. So, that is an opportunity for folks to invest and support their retirement security later on in life. And then just supporting our family caregivers.

I think family caregiving is the backbone of our long-term services and support system and we have a lot of work to do and have really drilled down on trying to support our family caregivers as much as possible.

Ed: Thanks, Jarett. We're going to take a short break and then come back with the rest of our discussion.

MUSIC and Gene VO

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TM: 15:22

Ed: One of things we love to do on this podcast is ask people about lessons learned because one of our goals is to share information across states and hope people will profit from hearing other people's successes, and also maybe their mistakes or their challenges that they had.

I'm wondering, Jarett, let me stay with you for a minute, what would you say are some of the key lessons learned from your experience? You guys both have quite a bit of experience in this. So, what would you put at the top of your list of lessons learned?

Jarett: Obviously, this work has to be done through somewhat of a systems lens but realizing that all the different levels of that system have to be represented and at the table. I think I kind of touched on it earlier but having state agency representatives from whether or not it's the Division of Housing or health promotion and crime disease prevention, or innovative mobility and transportation planning, having those folks together, but also having county commissioners and city council members and the private sector and nonprofit represented at the table is critically important to success, because it really is a dynamic and interdependent process.

We can't just make state policy and expect it to be effectively implemented at the local level if we don't have good collaboration and good partnerships. I think that's the topline takeaway for me for this work and when I look across the country and talk with other states about how they go about this work, I have really seen four key components that I often think about.

I see, one, a responsive and proactive state office on aging or state unit. I see an engaged and empowered citizen advisory council to help inform that work. I also notice very strong local, community-based organizations that can take the lead. And then I also have seen a common thread of having a strong philanthropic foundation to really help innovation and help support things that maybe local governments or the state aren't doing yet.

I think having all those pieces bundled together is very important and I think that we're very much trying to build out that structure in Colorado. I think we're lucky to have a lot of organizations that fit that bill.

I think the other piece I would add there is really the importance of having clear goals and achievable metrics in your work. When I look back, I think that's something that I wish we had done a little bit better, but something we're very much moving towards now and remedying a bit.

Being able to really track that success helps with not only being able to demonstrate it and show it publicly, but it helps ensure accountability. I think that's what folks really want to see. And then it allows you to celebrate your successes and reevaluate where you might need to shift and refocus a bit.

TM: 18:32

Ed: Well, that's interesting. What I'm hearing from both of you is your agencies ran into some problems, recognized them and said yeah, we've got to shift gears a little bit to make this work better, which I've got to think is the healthiest response to that sort of thing.

Holly, how about you – what are the lessons learned there in Texas?

Holly: One of the first lessons learned is just through the longevity of this initiative, of our Aging Texas Well initiative. When it was initially created, it was looking at that time down the road to when Baby Boomers would meet retirement age and identifying ways to help meet their anticipated needs. Well, that moment has come and continues on. So, for us, a lesson learned is this type of strategic planning should not be thought of as having a defined goal line, if you will. It should be a continual effort of looking ahead, asking the questions, analyzing the data, and realigning the roadmap as necessary as Jarett just said.

When we created Aging Texas Well, it had and continues to have at its core 16 impact areas that guide our work. Their impact is personal and as communities serving older adults. That was 23 years ago and while those issues are still very much relevant, others have come up and at times superseded those initial 16. So, a lesson for us, another one, is that the plan and the initiative needs to learn from changes, exactly as Jarett was talking about, and have a structure that can accommodate that.

And then I think you also have to be honest with what the plan can and can't do. It can't answer all the questions or identify all the issues, and I would not want to be overdeveloping that plan if that was its goal; that's just too much.

TM: 20:36

Ed: So, now I know that in... I'm sorry, Jarett, go ahead.

Jarett: Yeah, thanks. Holly said something; you said something earlier also that I meant to follow up on. You mentioned kind of nontraditional partners I think, and that's been a really big key too. I don't think that was something that I necessarily thought much about or we thought much about on the front end of this process, but through the work have really come to realize that we need our planners, our city planners and our city managers... it's very easy to have your human service providers come to the table and the folks that are familiar with this work, but being able to connect the dots with your nontraditional partners is really critical to that buy-in and success, like real estate developers, etc. So, I wanted to add that.

Holly: Agreed. 100%. They bring so much to the table too. They should have always been a part of it and I think just out of habit and ease of work, we just kind of stay in our same systems and when we reach out and connect with others, not only does it invest them and empower them, it really enriches the whole process.

TM: 21:50

Ed: Well, let me ask you this as we wrap up. Our audience of course is legislators, legislative staff and others interested in state policy. Now, I know in Texas, it was an executive side and in Colorado it was the legislative side that was involved at the initiating level, but I wonder what kind of advice you would have for legislators if they wanted to either get involved or to ramp up an initiative in their state.

Holly, let me start with you. I don't even know if in your state it was a different initiator... What's your thought about that? What should legislators think about?

Holly: I would encourage you to engage with your older constituents and find out what their needs are and where they're having challenges, and then connect with your local aging services providers and see where there are resources that can be brought into service, and identify opportunities to encourage, again, that collaboration in your communities, because it's not something one person or agency can do.

I would also ask that you connect with your state unit on aging to see how you can support their strategic planning and master plans because, again, it's a group effort.

TM: 23:07

Ed: Jarett, you get the final word. What would your parting advice be?

Jarett: I think the first step is adoption of this is an issue, right, kind of recognizing that this is something that the state should be focusing on. Holly kind of said it – ask your constituents what they're seeing throughout this process, but also look internally and look within your families and have this conversation about what's happening with your grandparents or your great aunts, or all these folks that you see, and try to understand that process.

Then think about how that has systemic impacts across your state. I think that realization component is often, from my experience, I see it through family caregiving. I think that's how a lot of folks come to the table. They experience that and they begin to realize that this is a complicated process that you have to navigate. So, they come, they show up, and they start doing the work and realize that there's this whole broad spectrum of issue areas to focus on.

It's really dynamic. I'm biased, but I think it's pretty interesting and really great work. Our entire country's demographics are shifting, and demography is evidence based and the foundation that should be used through this work. It doesn't lie and there are broad, systemic impacts associated with demographic shifts.

And then I think... Holly kind of said this too... but I think one of the things that legislatures could do that is always important is work with your state agency leaders. There is so much subject matter expertise scattered across state governments, and really tapping into that as a resource is critical.

Then, again, working with your community-based organizations and your advocates to have a comprehensive, holistic perspective, and get to know your local area agency on aging, get to know those folks. I think they can tell you everything they see at the local level and how that impacts your constituents.

TM: 25:13

Ed: Well, as somebody who falls squarely in this demographic, I have to agree that sounds pretty interesting. Holly, you were going to add something.

Holly: I just want to “hear, hear” Jarett, this is good work. This is exciting work. I’m grateful to be doing this work and work with the professionals on this important topic. So, when you said that, I was like yeah!

Jarett: And I think one of the other things I would add that I didn’t mention yet which surprises me is I think the value in trying to do this work intergenerationally as well and trying to bring together different perspectives and folks of different ages to help do this planning and problem solving... I am very fortunate to have been able to work with folks in their 50s and 60s and 70s and 80s and 90s over the years and really get to learn and absorb so much for someone who is still very much kind of early on their career.

It’s been incredibly personally rewarding, but also just professionally, I think we come up with better solutions when we go that route.

Ed: Well, thanks to both of you for the work you’re doing and thank you for walking us through this topic and what’s going on in your states. Take care.

MUSIC

Ed: And that concludes this episode of our podcast. We encourage you to review and rate NCSL podcasts on Apple podcasts, Google Play, Pocket Casts, Stitcher, or Spotify. We also encourage you to check out our other podcasts: *Legislatures*, *The Inside Story*, and the special series *Building Democracy*. Thanks for listening.