

GOVERNOR'S AGING SUMMIT



The age wave is here: baby boomers are aging, 12% of Washingtonians are now 65 plus. By 2030 that will grow to nearly 20%. This age wave is both an opportunity and a challenge. It is wonderful that people can now expect to live 20 to 30 years beyond the traditional retirement age of 65. And it is a reality that this growing aging population is putting pressure on our state-funded services and infrastructure. We all want to be independent, engaged and productive members of society as we age, the question is... **Is Washington State Ready?**

Governor's Aging Summit

OCTOBER 1, 2013 | SEATTLE, WASHINGTON

The Aging Summit 2013 was a high level, interactive discussion hosted by the Governor and led by a professional facilitator. The approximately 100 invitees included key cabinet officials, selected legislators, community leaders and issue experts from Washington State and beyond. The Summit was a solution oriented exchange of ideas and outside-the-box thinking focused on state government initiatives. Participants identified fiscally responsible strategies to prepare for and embrace this unprecedented demographic shift.

Purpose:

- Focus state policymakers and opinion leaders on the age wave on the horizon.
- Explore strategic actions state government can take to create a more age friendly environment and reduce pressure on future state budgets.
- Jump-start the work of the legislative-executive Aging and Disability Committee.

Major topic areas discussed:

- **Livable Communities:** Today, approximately 15% of Washingtonians age 65+ no longer drive. In the future, new housing and transportation options will be essential to keep our older population mobile and engaged.
- **Financial Security:** The "boomers" are woefully unprepared for retirement. A recent AARP survey found that 25% have saved less than \$25,000, putting them at risk of poverty in their retirement and straining the capacity of our state's safety net.
- **Health Care-Healthy Aging:** As our population ages, so will the incidence of debilitating diseases and chronic health care conditions.
- **Long Term Services and Supports:** Washington has been very successful in the move toward more cost effective and popular home and community based long term services and supports. Our next challenge is financing reform. Our state Medicaid program, the safety net for long term care, will not be able to sustain the rising demand in the future.

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Governor Inslee's Aging Summit

October 1, 2013

Talaris Conference Center

4000 NE 41st Street - Seattle, WA 98105

(206) 268-7000

[View Printable Map](#)



Purpose

- ✓ Focus state policymakers and opinion leaders on the age wave.
- ✓ Explore strategic actions state government can take to create a more age friendly environment and reduce pressure on state budgets.
- ✓ Jumpstart the work of the legislative/executive Aging and Disability Committee.

The conversation will be solution oriented where participants will exchange ideas and outside-of-the-box thinking. Participants will identify fiscally responsible strategies to prepare for and embrace this unprecedented demographic shift.

Agenda

10:00 – 11:00 a.m. OPENING, facilitated by *Erin Waters, Governing Magazine* with welcome from *Charley Reed, AARP*

- » Governor Jay Inslee, opening remarks
- » Dr. Laura Carstensen, Stanford Center on Longevity, keynote
- » Discussion with Governor Inslee, facilitated by Erin Waters

11:05 a.m. – 12:20 p.m. Round #1: Break-out Groups to Discuss and Prioritize Strategies
(see reverse for session detail and your nametag for group assignment)

Pick up Lunch & Rotate

12:35 – 1:50 p.m. Round #2: Break-out Groups to Discuss and Prioritize Strategies
(see reverse for session detail and your nametag for group assignment)

2:00 – 3:00 p.m. CLOSE, facilitated by *Erin Waters, Governing Magazine*

- » Break-out groups report on proposed strategies to Governor Inslee
- » Summary discussion

Closing remarks from Governor Inslee

JAY INSLEE
Governor

Break Out Group Descriptions

1. Livable Communities (*Lodge Room*)

Today, approximately 15 percent of Washingtonians age 65+ no longer drive. Many have trouble finding affordable housing. In the future, new housing and transportation options will help keep our older population mobile and engaged.

- » What can Washington, through a better-built environment, do to improve the health and well being of people of all ages?
- » What can be done to ensure affordable, accessible housing with proximity to services that people need as they age?
- » How can we encourage flexible transportation options to help people remain mobile longer?

Facilitated by: Peter Lagerwey, Executive Director, Toole Design Group

2. Financial Security (*Alder Room*)

The "boomer" generation is woefully unprepared for retirement. A recent AARP survey found that 25 percent have saved less than \$25,000, putting them at risk of poverty and straining the capacity of our state's safety net. Some who have savings suffer from financial exploitation.

- » How can we help people plan for a secure retirement?
- » How can we incentivize more businesses to offer retirement savings plans?
- » What more can we do to ensure our most vulnerable are safe from financial exploitation?

Facilitated by: Elaine Ryan, Executive Vice President, AARP

3. Health Care (*Maple Room*)

As our population ages, the incidence of debilitating diseases and chronic health care conditions will increase, including Alzheimer's disease. Staying healthy as long as possible and then making informed end-of-life decisions are increasingly important.

- » How can we help people stay healthy longer?
- » What strategies can we implement to prepare for the projected increase in cases of Alzheimer's and other dementias?
- » How can we support informed decision making with regard to end-of-life care?

Facilitated by: Dorothy Teeter, Director, Washington State Health Care Authority

4. Long Term Services and Supports (*Cedar Room*)

Washington has been very successful in the move toward more cost effective and popular home and community-based, long-term services and supports. Our next challenge is financing reform. Our state Medicaid program, the safety net for long term care, will not be able to sustain the rising demand in the future.

- » How can we better serve the "pre-Medicaid" population and support families in taking care of their own loved ones for as long as possible?
- » How can we leverage private resources to pay for long-term care and incentivize people to prepare for future costs?

Facilitated by: Robyn Stone, Executive Director, LeadingAge Center for Applied Research

Format

The Aging Summit was intended to be participatory in nature and to encourage an exchange of information, ideas and concrete suggestions. The individual break-out sessions were designed to identify and bring forward ideas on major topic areas - Livable Communities, Financial Security, Health Care/Healthy Aging, Long Term Services and Support - to share with Governor Inslee. Each participant attended two of the four topic area break-out groups.

Facilitators guided the discussions with key questions, led discussion around ideas that participants suggested and identified a "top five list" of ideas/policy directions that attracted the most interest and energy from the group.

While there was no expectation to achieve consensus in the groups or decide on formal recommendations, the ideas generated at the Summit will help to inform the Governor's priorities and the work of the Joint Legislative Executive Committee on Aging and Disability.



Governor Inslee

"We are here today because we all share the same goals. And those goals are to improve and enhance the lives of Washington's senior citizens, and to improve and enhance the health of Washington's communities."

"Here's something we can be proud of: We've provided people choice and dignity. Choice and dignity in services provided – and we're going to work to make sure our long-term care system not only survives but gets even better."

Laura Carstensen, Stanford Center on Longevity

Laura Carstensen, PhD, the Director of the Stanford Center on Longevity provided the keynote address. She presented the age wave from an historical and evolutionary perspective. She described how changing demographics have impacted our public services and supports, demonstrating a mismatch between the culture of the past and the reality of today. Supportive demographics include:



- In 1850 the average life expectancy was 35 years of age, in 1900 it was 47, and in 2000 it was 70 years of age.
- Today, 2/3 of the entire historical human population is alive.
- We are not genetically hardier than our ancestors; we just have a higher probability of survival due to medical advances, sanitation, immunizations, and other factors.

Livable Communities

Facilitated by: Peter Lagerwey, Executive Director, Toole Design Group

Recorded by: Cathy Knight

Today, approximately 15% of Washingtonians age 65+ no longer drive. Many have trouble finding affordable housing. In the future, new housing and transportation options will keep our older population mobile and engaged.

- What can Washington State do, through a better-built environment, do to improve the health and well-being of people of all ages?
- What can be done to ensure affordable, accessible housing with proximity to services that people need as they age?
- How can we encourage flexible transportation options to help people remain mobile longer?

Livable Communities: TOP 5 IDEAS

- Small planning grants to support development of “livable communities” based on principles of universal design and Complete Streets.
- Coordination of funding to eliminate silos in housing/transportation.
- Clustering of services/housing around transportation hubs (TOD).
- Pass Transportation Revenue package (Oregon experience should inform our package).
- Create more affordable land for housing options.

Other Input from Sessions

- Institutionalize universal design principles in all new built environments, new housing developments and in major housing renovations.
 - Pass building codes to reinforce these principles (e.g., all new single & multi-family homes should meet “visitability” guidelines).
 - Recognize that built environments do more than just make housing and transportation accessible, but also save energy and improve health outcomes for the people there.
 - Encourage local communities to implement universal design guidelines in their planning for built environments and eventually these guidelines should be required with any new developments. Zoning ordinances will need to be simplified and updated.
 - Local commissioners and stakeholders need to better understand and provide support for the variety of housing and transportation options their communities will need in the future.
 - Local planning for “livable communities” should include partnerships with key stakeholders, including WSAC and Association of Cities; WSDOT and Commerce [Growth Management Act program]; include performance measures & targeted outcomes that cities and counties can implement as they plan with these grants.
 - Eliminate the conflicting requirements for the range of senior housing options, replace with universal design guidelines and let the money follow the person so that individuals have the necessary blend of housing and supportive services to age in place.
 - Inclusiveness & Cultural Sensitivity needs to be built into all livable community designs.
 - Art needs to be part of the built environment.

- Disaster Preparedness needs to be part of planning and design & addressed in all plans.
- Better inform consumers about what housing and transportation resources are available:
 - Facilitate consumer access to an adequate supply of affordable, accessible housing, public transportation options and supportive services through a statewide inventory of resources and the development of a directory of available resources.
- Increase access to affordable housing:
 - Target the Housing Trust Fund dollars toward the housing options needed for livable communities
 - Mandate all developers to include more low-income housing in their new developments.
 - Increase the availability of affordable land for future housing developments. Governor could promote public-private partnerships; provide tax incentives for sellers to make land more affordable for built environments, expand the “land acquisition program” to buy more land to increase affordable housing options.
- Establish a new role for community “connectors” who work with people in senior housing programs so they can access the supportive services they need to stay at home. Bring service coordinators to the person who needs supportive services so that they can stay in their own home and ensure that training is provided for this new “service coordinator” role.
- Use the state transportation revenue package as an opportunity to prepare for the age wave. Invest in public transit and special needs transportation.
- Invest in Complete Streets grant program as a mechanism to support livable communities.
- Strengthen the Growth Management Act and use the GMA to help rural communities better plan for the future.
- Enforce the development of public transportation routes/hubs in greater proximity to housing clusters and support services so that people can access the resources they need to age in place. Better coordination of transit options will help eliminate some of the isolation currently experienced by too many seniors. Require developers to address sustainable, appropriate transit options as part of any new housing developments.
- Identify better ways to provide special needs transportation services (e.g. better coordination of single purpose transit trips; provide soft subsidies for neighborhoods to coordinate local shuttles (easy access, simple scheduling); explore opportunities to develop locally relevant public transit options.
- Do more to address accessibility issues for users of all types of public transportation:
 - Users of the state ferry system – e.g., buses need to be in proximity of ferry for people with mobility issues
 - Make better use of existing transportation routes (e.g., get serious about dedicated bus lanes; provide incentives to keep trucks off the road during peak hours).
 - Recognize the needs of younger seniors with cognitive limitations and dementia. Communities need to be dementia friendly (e.g. modified transit assistance like reminding riders of upcoming public transit stops).
- Bring youth to the table in planning for transportation options – use the natural intergenerational connections – e.g. youth today don't need or want cars like the previous generations – coordination across generations could improve transportation options. Today's youth are using transportation differently than the Boomers do.
- Find ways to promote community health and wellness, like tax credits to health clubs who serve seniors.

Financial Security

Facilitated by: Doug Shadel, AARP
Recorded by: Ingrid McDonald

The “boomer” generation is woefully unprepared for retirement. A recent AARP survey found that 25% have saved less than \$25,000, putting them at risk of poverty and straining the capacity of our state’s safety net. Some who have savings suffer from financial exploitation.

- How can we help people plan for a secure retirement?
- How can we incentivize more businesses to offer retirement savings plans?
- What more can we do to ensure our most vulnerable are safe from financial exploitation?

Financial Security: TOP 5 IDEAS

- Encourage **private savings** by making it easier for small businesses to offer workplace savings accounts.
- Protect **pensions** and support people of all ages and abilities who want to enter the workforce/ **work longer**.
- Teach **financial literacy** at all stages.
- Ensure a **timely and more effective** APS response.
- Ensure access to **guardians** and improve oversight and accountability.

Other Input from Sessions

Use the Elder Economic Index – The federal poverty level is not a good measure of the actual cost of living for older people. Instead, the state should use the Elder Economic index for eligibility determination for state services and programs.

Promote Individual Savings – A proposal entitled Save Toward A Retirement Today (START) was proposed as a means to encourage individuals to save for retirement. The concept is to make it easier for small businesses to offer retirement savings accounts. START would be administered by the Department of Retirement systems, and accounts would be managed by the Washington Investment Board. The idea is to focus on people not saving now.

The benefit of this is large economies of scale, low fees, portability, and simplicity. Challenges are startup costs, liability questions, opposition from financial services industry.

More than half of all employees are not saving – existing retirement systems don’t fit a lot of today’s workers, who are self-employed or who work for small employers; young people tend not to think about the future. Need to automate it, make it as easy as possible.

WHAT IS A LIVABLE COMMUNITY?

AARP defines a livable community as “one that has affordable and appropriate housing, supportive community features and services, and adequate mobility options, which together facilitate personal independence and the engagement of residents in civic and social life.”

Business owners should play a more active role in educating employees about the value of saving and encouraging them to save.

Think about ways to leverage intergenerational support – through a GET like mechanism whereby parents and grandparents could set aside money either for their children's education or their retirement savings.

Support living wage jobs – People aren't saving because they don't have the money to save. State needs to promote living wage jobs.

Note the intersection with Long Term Care financing - The broken long term care financing system works against the goal of financial security by incentivizing people to impoverish themselves in order to access long term care. We need more regulation of the private long term care insurance industry.

Expand financial literacy - Focus on financial literacy, teach people at all stages of life, make it a basic curriculum in schools, and make it accessible in multiple languages. Teach people about the dangers of predatory lending.

Protect state pensions – The legislature should keep its promises. Protect the integrity of defined benefit pensions as a secure tool to promote retirement savings.

Maximize workforce participation – Support people who want to remain in the workforce after age 65, build support for people with disabilities who want to enter the workforce.

Educate about Veterans benefits – Help people access the benefits they have earned, including veterans benefits, Medicare, Social Security.

Strengthen Adult Protective Services - Fund more APS workers and improved effectiveness in responding to cases of financial exploitation, abuse and neglect. Specifically, improve training and use a better and more consistent tool for screening for capacity. Department does not have the staff it needs to investigate cases in a timely manner. Without sufficient funding, Department will have to prioritize physical and sexual abuse and spend fewer resources on financial exploitation.

Improve Guardianship – Improve the system so everyone who needs one has access to a guardian and do more to prevent guardianship abuse. Leverage volunteers to meet this goal, perhaps through the home companionship program. Fully fund the Office of the Public Guardian.

Regulate Powers of Attorney – More oversight is needed. Evaluate how to restructure or increase regulation.

Engage banks and financial institutions in fraud prevention – Require them to be mandatory reporters and teach them how to look out for fraud and financial exploitation.

Health Care - Healthy Aging

Facilitated by: Dorothy Teeter, Director, Washington State Health Care Authority

Recorded by: Cheryl Townsend Winter

As our population ages, the incidence of debilitating diseases and chronic health care conditions will increase, including Alzheimer's disease. Staying healthy as long as possible and then making informed end-of-life decisions are increasingly important.

- How can we help people stay healthy longer?
- What strategies can we implement to prepare for the projected increase in cases of Alzheimer's and other dementias?
- How can we support informed decision making with regard to end of life care?

Health Care - Healthy Aging: TOP 5 IDEAS

- Establish a task force, commission (or perhaps Aging & Disability Committee) to promote a culturally competent activist approach, with a learning community aspect, to aging (fund via PCORI?) and reform regulations around treatment providers and reimbursement.
- Begin the process to develop a Washington State Alzheimer's Plan and start conversations about planning earlier in the disease to help deal with the "fear" factor.
- Grow and sustain the "Falls Prevention Program" – could be an opportunity to partner with facility-based providers.
- Create a matching service (match.com??) to match volunteers to needs using available resources.
- Develop statewide system with measurable goals around POLST, hospice utilization, ICU deaths and desired place of death percentages i.e. a "report card".

Other Input from Sessions

- Work through the Bree Collaborative to identify strategies to encourage informed end of life decision making including shared decision making.
- Develop a "Your good EOL care begins with you!" campaign, i.e. the individual is accountable.
- Put emphasis on what "less is more" care *can mean*.
- Link policy to public health, e.g. housing.
- Consider population disparities.
- Provide an access line for adults like PAL is for children.
- Intervention medically earlier in life.
- Consider reimbursement for physical health by using prescriptions for exercise with "green" Rx or written advice from a MD for a goal-oriented exercise program which has been shown to be effective.
- Develop a public awareness campaign along the lines of "live long & healthy" which could be done in partnership (e.g., WA State Health Foundation, the State Council on Aging, the WA State Department of Health, and/or the ACA Prevention & Public Health Fund Resources).
- Create a state sponsored dental care coverage program.

- Create a public portal to provide information for healthful living.
- Do community-based education & training.
- Recruit MD's to rural areas.
- Develop prescription reconciliation.
- Eliminate laws that discourage "encore" work.
- Promote community conversations about when someone is no longer healthy.
- Support, continue to develop at-home resources to bend the cost curve.
- Require that state facilities provide EOL care.
- Educate & support family/caregivers early in Alzheimer's Disease.
- Get Medicare benefits for in-home care.
- Develop an Advanced Directive and education program(s) regarding Alzheimer's and dementia.
- Develop a statewide system for advanced directive.
- Use the term "late in life" versus end of life (EOL).
- Provide EOL services in home.
- State law should trumpet corporate policy for EOL.
- State funding & emphasis on community based care transitions: Long-term care and medical care in a collaborative system.
- Fashion work-place wellness program for small businesses.
- Incentivize the health business to encourage seniors to get healthier.
- Enhance a transportation plan for older citizens and their care givers.
- Provide credit to an L&I premium to incentivize workplace wellness.
- Provide wellness care like the medical home project which works to improve care for those who have ongoing health or developmental conditions.
- Deal with inequitable funding to some counties in the state.
- Create PSA's, media campaign, to increase awareness about Alzheimer's and dementia.
- Maximize available resources to share/identify resources i.e., a statewide clearinghouse for educational materials made available to all.
- Partner with private organizations to share resources.
- Develop outreach to MD's and residents with a checklist to help make decisions about hospitalization or release and make shared tools & resources available.
- Develop an educational program for families and caregivers including cultural diversity issues.

Long Term Services and Supports

Facilitated by: Robyn Stone, Executive Director, LeadingAge Center for Applied Research

Recorded by: Misha Werschkul

Washington has been very successful in the move toward more cost effective and popular home and community based long term services and supports. Our next challenge is financing reform. Our state Medicaid program, the safety net for long term care, will not be able to sustain the rising demand in the future.

- How can we better serve the “pre Medicaid” population and support families in taking care of their own loved ones for as long as possible?
- How can we leverage private resources to pay for long term care and incentivize people to prepare for future costs?

Other Input from Sessions

- Pursue the Community First Choice Option in 2014 to get federal dollars to fund enhancements for aging and DD.
- Develop more upstream approaches to better support unpaid family caregivers:
 - Expand the T-CARE program, make available at community level and make culturally competent.
 - Translate the “Powerful tools for Caregivers” program and improve the cultural competency of program.
 - Explore ways to train families and informal caregivers together.

Long Term Services and Supports:

TOP 5 IDEAS

- Washington should pursue short and long-term approaches to bringing in additional resources to finance long-term services and supports. In the short term, Washington state should pursue the **Community First Choice Option** to bring in additional federal dollars to re-invest in home and community based services and supports for pre-Medicaid population. In the longer-term, the state should create a **public social insurance system** to help families save for their long-term care needs.
- There is a need for **additional supports for the pre-Medicaid population**, including expanding **Aging and Disability Resource Centers (ADRCs)** statewide to provide options counseling and navigation supports.
- Washington's long-term care system relies on paid and unpaid caregivers who need additional supports. Options include expanding the **T-Care** and **Family Caregiver Support** programs, promoting **cultural and linguistic competency** in the workforce, and **addressing turnover for the paid workforce**.
- Washington must address **funding issues** in our existing LTSS system and restore programs that were cut during the recession. This includes both **service restorations** and **vendor rate restorations**.
- Washington has been successful in moving people from institutional to home and community based settings yet we do not have a robust system of quality metrics for our home and community based system. A final immediate action item is to invest in **developing a robust quality and workforce metric system for our HCBS system**.

- Use CMS dementia training as a resource for family caregivers.
- Need additional support/investment in (under)paid caregivers.
 - We rely on family caregivers but are going to be less able to rely on them in the future since there are limits on what they can do – need robust paid workforce which requires addressing turnover and recruitment problems.
 - Create state incentives to get people to become LTC workers.
 - Pursue Federal Basic Health Option and improve access to health insurance for paid workers.
 - Prepare for diversity of aging population by supporting a diverse workforce – 70+ languages, need for cultural and linguistic competency, LGBTQ older adults.
- Increase Funding to Expand Aging and Disability Resource Centers.
 - Provide help to the pre-Medicaid population by providing options counseling and navigation, helping families buy what they actually need, supporting caregivers, and helping with living wills and powers of attorney.
 - Also need marketing of the availability of ADRCs as a resource.
 - Re-establish gate keeper program.
- Need state level financing options to help middle class families prepare for LTSS needs.
 - Develop public insurance option to bring private dollars into LTC/LTSS system - state level social insurance/ state level CLASS Act.
 - Look at Hawaii's approach or German system.
 - Revive Braddock payroll tax idea.
 - Key is to bring private resources into system – also could have a private wrap around to public program?
 - Maybe take incremental approach to helping families prepare for risk of LTC/LTSS.
 - Thoughtfully set level to trigger benefits.
 - Should be mandatory – “everyone in”.
 - Recognize limitations of private LTC insurance.
 - Need to address growing income inequality, low wages so people have money to save for LTSS needs – some ideas include statewide higher minimum wage, robust transportation and capital budgets.
 - Create options for older wealthy people to save money in retirement plans for next generation – support intergenerational financing.
- Expand Medicaid as co-insurance for LTC/LTSS.
- Increase income/asset levels so more people qualify for Medicaid LTSS (like England is doing).
- Provide increased support for community LTSS providers and develop new partnerships with these providers – for example, develop new provider models (e.g., villages) to cover full continuum of care and new partnerships around care transitions.
- Look at Medicaid payment structures – does payment match acuity? Does it match changing provider roles? \$11M in cuts has impacted system.
- New additional state revenue to fund services for seniors + rest of state government – need tax reform.
- Need a new approach to quality – establish core indicators for home and community based services that are transparent.
 - Include freedom from abuse and neglect, consumer choice in quality indicators.
 - Workforce indicators (like turnover) can be proxy for quality.

- Expand Senior Citizens Services Act funding – funds senior meals, respite care, ombudsman – program needs to be increased to serve growing population.
- Create a sliding fee schedule for Medicaid LTSS services -Medicaid buy in? Increase access to home care for pre-Medicaid group.
- Create a greater focus on people who need guardianship/can't make decisions for themselves and also look at alternatives to guardianship.
- Need reforms to housing laws to allow housing providers to do interventions and better connect housing to services
- Look at ways to better leverage veterans resources/LTC benefits – federal \$\$.
- Build on Community Based Care Transitions Program and Health Homes – need savings to come back into LTC system. Maybe expand Community Based Care Transitions Program?
- Build on best practices from existing providers – specialized dementia care for example – and expand into other settings to support aging in place.
- Keep in mind health disparities, income inequality, and impact of marginalization within aging population.

Next Steps

- **Share with the broader community** - the ideas generated at the Aging Summit will be shared with the broader community and presented at the annual Senior Lobby conference on October 18th, 2013.
- **Report to the Aging and Disability Committee** - nearly all of the members of the Joint Executive-Legislative Committee on Aging and Disability were present at the Summit. The ideas explored at the Summit will jump start the work of this committee. The committee next meets on November 4, 2013.
- **Identify specific budget and legislative priorities, both short-term and long-term ideas** - the ideas generated at the Summit will inform the Office of the Governor and the new Joint Committee as they develop specific budget proposals and policy initiatives.

We are working hard to make Washington an age-friendly place to live, as well as a friendly place to age. This is an opportunity for our state to do some groundbreaking work in our communities.

– Governor Inslee

Participants of the Aging Summit

Alfie	Alvarado-Ramos	Director	Washington State Dept. of Veterans Affairs
Bob	Anderson	CEO	Horizon House
Rep. Sherry	Appleton	Representative	Washington State Legislature
Barbara	Bailey	Senator	Washington State Legislature
Bill	Barron	Retired County Administrator	Clark County Government
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Maria	Britten-Sipe		Public Employees
Lori	Brown	Director, W4A Chair	SE WA Aging & Long Term Care
John	Burbank	Executive Director	Economic Opportunity Institute
Virgil	Clarkson	Mayor of Lacey	
Dr. Bob	Crittenden		Governor's Policy Office
Bob	Drewel	Executive Director	Puget Sound Regional Council
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Sharmon	Figenshaw	ARNP	The Everett Clinic/Providence Inpatient Palliative Care
John	Ficker	Executive Director	Washington State Residential Care Council
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David	Fleming, MD	Director and Health Officer	Public Health-Seattle & King County
Stacey	Folsom	Deputy Director of Policy Development	House of Representatives, Republican Caucus
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Karen	Fredriksen-Goldsen	Professor and Director of the Institute for Multigenerational Health	University of Washington

David	Frocket	Senator	Washington State Legislature
Marcie	Frost	Director	Department of Retirement Systems
Terry	Gardiner	Policy Director	Small Business Majority
Robert	Gelder	Commissioner	Kitsap County
Nora	Gibson	Executive Director	Full Life Care
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Lee	Goldberg		National Academy for Social Insurance
Edwin	Gonion	Executive Director	Washington State School Retirees Association
Rashi	Gupta	Senior Policy Analyst	House of Representatives
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Gail	Haskett	Gerontologist/ Chair	Aging Resources, Inc./ State Council on Aging
Robert	Hellrigel	Chief Executive Officer, Senior and Community Services	Providence Health & Services
Kim	Herman	Executive Director	Housing Finance
Maria C.	Hernandez-Peck	Professor Emeritus	Eastern WA University, Center for Studies in Aging
Carole	Holland	Senior Budget Assistant to the Governor	Office of Financial Management
Nancy	Hooyman	Professor	U of Washington School of Social Work
Patricia	Hunter	Washington State LTC Ombudsman	Multi-Service Center
Trudy	Inslee		
Laurie	Jinkins	Representative	Washington State Legislature
Norm	Johnson	Representative	Washington State Legislature
Betsy	Jones	Health and Human Potential Policy Advisor	King County Executive Office
Karen	Keiser	Senator- 33rd District	Washington State Senate
Aisling	Kerins	Director of External Affairs	Office of Governor Jay Inslee
Karen	Jensen		Department of Health
Cathy	Knight, PhD	State Director	WA Association of Area Agencies on Aging
Peter	Lagerwey	Regional Office Director	Toole Design Group
Barry	Lamont		
Eric	Larson	Vice President Research, Executive Director	Group Health Research Institute

Governor's Aging Summit

Bob	Le Roy	President & CEO	Alzheimer's Association Western and Central Washington State Chapter
Tony	Lee	Advocacy Director	Solid Ground
Kathy	Leitch	Principal	Health Management Associates
Daniel	Lessler	Chief Medical Officer	Health Care Authority
Dennis	Mahar	Director	Lewis Mason Thurston Area Agency on Aging
David	Mancuso	Research Office Chief	WA State DSHS Research and Data Analysis
Michael	Maples	CEO	Community Health of Central Washington
Carma	Matti-Jackson	Fiscal Analyst	Senate Committee Services
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Steve	McLain	Assistant Director for Human Resources	Dept of Labor and Industries
Brent	Meldrum		
Mark	Mullet	Senator	Washington State Legislature
Deb	Murphy	CEO	LeadingAge Washington
Dan	Murphy	Director, Legislative and Policy Analysis	DSHS Aging & Long Term Support Admin
Diane	Narasaki	Executive Director	Asian Counseling & Referral Service
Peter	Nazzal	Director, Long Term Care System	Catholic Community Services
Sharon	Nelson	Senator	
Hieu	Nguyen	Case Manager/Southeast Asian Program Coordinator	Korean Women's Association
Gloria	Papiez	Deputy Director	WA Dept. of Financial Institutions
Mimi	Pattison MD	Medical Director Franciscan Hospice and Palliative Care	Franciscan Health System
Lynn	Peterson	Secretary of Transportation	Washington State Department of Transportation
Kevin	Quigley	Secretary	Department of Social and Health Services
Marie	Raschko-Sokol	Chair	Washington State Council on Aging
Charissa	Raynor	Executive Director	SEIU Healthcare NW Training Partnership
Bea	Rector	Interim Director, HCS	DSHS/AL TSA/Home & Community Services
Charles	Reed		AARP

Terry	Rogers	CEO	Foundation for Health Care Quality
David	Rolf	President	SEIU Healthcare 775NW
Cindy	Ryu	Representative	Washington State Legislature
Bob	Scarfo, PhD	Founder/Owner	Land and Life, LLC
Eileen	Schock	Staff Attorney (Focus on Senior Issues)	Columbia Legal Services
Doug	Shadel	State Director	AARP
Pamela	Sloan	Director - Elder Services	Frontier Behavioral Health
Bruce	Smith	Associate Medical Director	Group Health
Robby	Stern	President	Puget Sound Advocates for Retirement Action
Robyn	Stone	Executive Director	LeadingAge
Christine	Takada	President and CEO	National Asian Pacific Center on Aging (NAPCA)
Dorothy	Teeter	Director	Health Care Authority
Steve	Tharinger	Representative	Washington State Legislature
Dr. Cheryl	Townsend Winter		American Academy of Periodontology
Page	Ulrey	Senior Deputy Prosecuting Attorney	King County Prosecutors Office
Stephen	Uy	King County Representative	Governor's Office
Doug	Walsh	Director- Medicaid Fraud Control Unit	Attorney General's Office of Medicaid Fraud
Misha	Werschkul	Legislative and Policy Director	SEIU Healthcare 775NW
Kristen	West	Vice President	Empire Health Foundation
Karen	Winston	Planner	Aging and Disability Services
Jay	Woolford	Executive Director	SHAG - Senior Housing Assistance Group

Planning Committee

- Cathy Knight, Washington Association for Area Agencies on Aging
- Ingrid McDonald, AARP Washington
- Jason McGill, Governor's Legislative & Policy Office
- Bill Moss, Department of Social and Health Services (DSHS)
- Marie Raschko-Sokol, Washington State Council on Aging
- Misha Werschkul, SEIU Healthcare 775 Northwest
- Dr. Cheryl Townsend Winter, American Academy of Periodontology

Staff: Ryan Black, OFM; Lynne Korte, DSHS; Cheryl Reed Weber, AARP; Stephen Uy, Governor's Office

Speaker & Facilitator Biographies

Erin Waters

Publisher, *Governing Magazine*

Erin Waters is publisher of GOVERNING, a division of e.Republic, where she oversees business development and sales across key market segments in the state and local government space, including finance, technology, infrastructure, energy and advocacy. Waters also oversees GOVERNING's editorial content and production teams as well as the GOVERNING Institute, the magazine's in-house research team. Prior to being named publisher, Waters served two years as associate publisher during which time she focused on business development and expansion across the GOVERNING platform. Prior to joining GOVERNING, Waters worked for National Journal and Congressional Quarterly, where she first managed the digital media platform and later handled advocacy advertising sales across print, online and event properties. A graduate of Rice University, Waters lives in Washington, D.C.

Laura Carstensen, PhD

Director, Stanford Center on Longevity

Laura L. Carstensen is Professor of Psychology and the Fairleigh S. Dickinson Jr. Professor in Public Policy at Stanford University, where she is also the founding director of the Stanford Center on Longevity, which explores innovative ways to solve the problems of people over 50 and improve the well-being of people of all ages. She is best known in academia for socioemotional selectivity theory, a life-span theory of motivation, and with her students and colleagues, has published well over 100 articles on life-span development. Her research has been supported by the National Institute on Aging for more than 20 years and she is currently supported by a Merit Award. In 2011, she authored *A Long Bright Future: Happiness, Health, and Financial Security in an Age of Increased Longevity*. She is a fellow in the Association for Psychological Science, the American Psychological Association and the Gerontological Society of America. She has chaired two studies for the National Academy of Sciences, resulting in *The Aging Mind* and *When I'm 64*. She is a member of the MacArthur Foundation's Research Network on an Aging Society and serves on the National Advisory Council on Aging. She has won numerous awards, including a Guggenheim Fellowship and the Distinguished Career Award from the Gerontological Society of America. She received a BS from the University of Rochester and PhD in clinical psychology from West Virginia University.

Peter Lagerway

Regional Office Director, Toole Design Group

Peter Lagerway is the Regional Office Director for Toole Design Group in the Northwest. Peter has over 29 years managing high profile pedestrian and bicycle projects and programs with the City of Seattle and as a private consultant. Peter is a nationally known expert having worked on non-motorized projects and made presentations in over 230 communities across the U.S. and Canada. Most recently he was Toole Design Group's project manager for pedestrian and bicycle plans in Bellingham, Dallas, Saint Louis, Wichita and San Antonio. Peter is the co-author of the FHWA manual on "How to Develop a Pedestrian Safety Action Plan" and is a certified national Complete Streets trainer. Peter brings extensive experience in the development and implementation of policies and programs related to creating walkable and bikable communities, bicycle and pedestrian planning and design, Safe Routes to School, social marketing, encouragement and education programs, and public participation.

Doug Shadel**State Director, AARP Washington**

Doug Shadel has served as state director for AARP Washington since 2003. Previously, he worked as a fraud investigator for the Washington State Attorney General's office. Shadel is a nationally-recognized expert on the prevention of financial exploitation of older persons and has co-authored a number of books and studies on the subject including "Schemes & Scams" (With John T.), "Weapons of Fraud" (with Anthony Pratkanis), "The National Victim Profiling Study" (with Karla Pak) and "Outsmarting the Scam Artists" (Wiley Publishing, 2012). Shadel has a PhD in social science and serves on the board of advisors for the Stanford University Fraud Research Center in Palo Alto.

Robyn Stone**Director, LeadingAge Center for Applied Research**

Robyn I. Stone, a noted researcher and leading international authority on aging and long-term care policy, joined LeadingAge to establish and oversee the LeadingAge Center for Applied Research. Stone came to LeadingAge from the International Longevity Center-USA in New York, N.Y., where she was executive director and chief operating officer. Previously, she worked for the Federal Agency for Health Care Policy and Research (now known as the Agency for Health Care Research and Quality). Stone also served the White House as deputy assistant secretary for disability, aging and long-term care policy and as acting assistant secretary for aging in the U.S. Department of Health and Human Services under the Clinton administration. She was a senior researcher at the National Center for Health Services as well as at Project Hope's Center for Health Affairs. Stone was on the staff of the 1989 Bipartisan Commission on Comprehensive Health Care and the 1993 Clinton administration's Task Force on Health Care Reform. Stone holds a doctorate in public health from the University of California, Berkeley.

Dorothy F. Teeter, MHA**Director, Washington State Health Care Authority**

Dorothy Teeter brings more than 25 years of experience as a senior health care system executive, public health director, hospital administrator, consultant and health policy advisor to her appointment as head of the Health Care Authority (HCA) in Washington State. In that position, she and her agency will play a key role in Washington's health care reform changes, including expansion of the state's Medicaid program by estimated 300,000-plus clients over the next four years and a new wellness-preventive perspective for state employee and retiree health benefits. Prior to her appointment as HCA Director by Governor Jay Inslee in 2013, she served as a senior advisor at the Center for Medicare and Medicaid Innovation in Washington, D.C., after serving as both Interim Director and Health Officer, and as Chief of Health Operations for Public Health - Seattle and King County. Ms. Teeter also served earlier as a senior executive at Group Health Cooperative, where she led the design and implementation of evidence based clinical quality, care management and information technology systems to support high quality health care delivery for more than 600,000 enrollees. Ms. Teeter holds a Master's degree in Health Services Administration from the School of Public Health at the University of Washington and is a Clinical Assistant Professor within the University of Washington's Department of Health Services.

Recommended Pre-Reads and Resources

Top-Line Recommended Pre-Reads

Talkn' bout My Generation: What makes the boomers the boomers? By Neil Howe, *Governing Magazine*, September 2012.

<http://www.governing.com/generations/government-management/gov-what-makes-boomers.html>

How Boomers, Millennials and Immigrants are Changing America. By Peter Harkness, *Governing Magazine*, May 2013

<http://www.governing.com/columns/potomac-chronicle/col-boomers-millennials-immigrants-changing-america.html>

Creating Communities that Support Healthy Aging. By Nancy LeaMond, Executive Vice President, Policy and Practice, April 2013.

<http://states.aarp.org/wp-content/uploads/2013/09/Creating-Communities-That-Support-Healthy-Aging.pdf>

In a Graying Population, Business Opportunity. By Natasha Singer, Feb 5, 2011, New York Times

<http://www.nytimes.com/2011/02/06/business/06aging.html?pagewanted=all&r=1&>

Research Highlights in the Demography and Economics of Aging, Helping Americans Age in Place, May 2013

http://agingcenters.org/docs/rh13_Helping-Americans-Age-In-Place_2013.pdf

2014 Washington State Aging Agenda. By AARP Washington

<http://states.aarp.org/wp-content/uploads/2013/09/2014-Washington-State-Aging-Agenda.pdf>

The Big Idea in 4 Minutes, Coming of Age in Aging America, video by Vitalpictures, 2012.

<http://www.youtube.com/watch?v=ZOA1v4-2Fos>

Readying for Retirement Everett Herald Op-Ed, 6/22/2013 by Senator Barbara Bailey and Representative Steve Tharinger.

<http://www.heraldnet.com/article/20130622/OPINION03/706229977>

Facts and Fictions about an Aging America. By the MacArthur Foundation Research Network on an Aging Society, Fall 2009

<http://www.macfound.org/media/files/AGING-CONTEXTS-FACTFICTION.PDF>

Resources by Topic

Livable Communities

Livable Community Indicators for Sustainable Aging in Place, Metlife Mature Market Institute.

<https://www.metlife.com/assets/cao/mmi/publications/highlights/mmi-livable-communities-highlights.pdf>

Aging in Place: A State Survey of Livability Policies and Practice. By Nicholas Farber, Douglas Shinkle - National Conference of State Legislatures, Jana Lynott, Wendy Fox-Grage, Rodney Harrell, from: Public Policy Institute, December, 2011

<http://www.aarp.org/home-garden/livable-communities/info-11-2011/Aging-In-Place.html>

Transportation Funding Reform: Equity Considerations for Older Americans By Jana Lynott, Sandra Rosenbloom, PhD, University of Arizona, from: Public Policy Institute, December 2011

<http://www.aarp.org/home-garden/transportation/info-12-2011/transportation-funding-reform.html>

Planning Complete Streets for An Aging America By Jana Lynott, Amanda Taylor, Hannah Twaddell, Jessica Haase, Kristin Nelson, Jared Ulmer, Barbara McCann, Edward R. Stolof, from: Public Policy Institute, May 2009

http://www.aarp.org/home-garden/livable-communities/info-08-2009/Planning_Complete_Streets_for_an_Aging_America.html

Loss of Housing Affordability Threatens Financial Stability for Older Middle-Class Adults By Rodney Harrell, PhD and Shannon G. Guzman, from: Public Policy Institute, January 2013

<http://www.aarp.org/research/ppi/security/loss-of-housing-affordability-threatens-financial-stability-for-older-middle-income-AARP-ppi-sec/>

Growing Older in Clark County: Making Clark County a better place to grow up and grow old. Prepared by the Aging Readiness Task Force and Clark County Community Planning Staff, February 2012.

http://www.clark.wa.gov/planning/aging/documents/12-0207_ARTF_Plan_Final_Maps_Complete_Print.pdf

Financial Security

Elders Living on The Edge: When Basic Needs Exceed Income in Washington. Wider Opportunities for Women. Washington Area Agencies on Aging, 2011.

<http://www.wowonline.org/documents/WAPolicyBrief.pdf>

Not Making the Grade: 2013 Survey of Financial Decisions Among Washington State Adults Ages 45-64. By Brittnie Nelson, AARP Research & Strategic Analysis, From AARP Research, April 2013

<HTTP://WWW.AARP.ORG/WORK/RETIREMENT-PLANNING/INFO-04-2013/NOT-MAKING-THE-GRADE--2013-SURVEY-OF-FINANCIAL-DECISIONS-AMONG-W.HTML>

The Retirement Savings Crisis: Is It Worse Than We Think? National Institute on Retirement Security, June, 2013.

http://www.nirsonline.org/index.php?option=com_content&task=view&id=768&Itemid=48

At Leisure, Or Still at Work, New York Times article by Steven Greenhouse, September 9, 2013

<http://www.nytimes.com/2013/09/10/business/retirementspecial/at-leisure-or-still-at-work.html? r=0>

Elder Justice: National Strategy Needed to Effectively Combat Elder Financial Exploitation, United States Government Accountability Office (GAO), November 2012 <http://www.gao.gov/assets/660/650074.pdf>

Financial Abuse Costs Elders More Than \$2.6 Billion Annually, According to MetLife Mature Market Institute Study http://www.gerontology.vt.edu/docs/MetLife_Fin_Elder_Abuse.pdf

Elder Financial Exploitation: Implications for Future Policy and Research in Elder Mistreatment by Thomas Price, MD, Patricia S King, RN, Rebecca L Dillard, MA, and James J Bulot, PhD. *West J Emerg Med.* 2011 July; 12(3): 354–356. <http://www.ncbi.nlm.nih.gov/pmc/articles/PMC3117613/>

Health Care

Washington State Chronic Disease Self-Management Education

http://aoa.gov/AoARoot/AoA_Programs/HPW/ARRA/Docs/WA%20Profile%20on%20Template.pdf

Lawmakers are cooking up ways to encourage better eating and cultivating local economies. By Amy Winterfeld, National Conference of State Legislatures, January 2012.

<http://www.ncsl.org/issues-research/health/the-new-healthy.aspx>

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http://act.alz.org/site/PageNavigator/state_plans.html

Washington State Alzheimer's Statistics, Alzheimer's Association, Alzheimer's Association.

http://www.alz.org/documents_custom/facts_2013/alz_f-statesheets-48.pdf?type=interior_map&facts=undefined&facts=facts

Boomers want Control of Their End-of-Life Care. By Jonathan Walters, *Governing Magazine*, October 2012

<HTTP://WWW.GOVERNING.COM/TOPICS/HEALTH-HUMAN-SERVICES/GOV-END-OF-LIFE-CARE-CONTROL.HTML>

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Letting Go: What should Medicine do when it can't save your life? by Atul Gawande, *New Yorker*, August 2, 2010.

http://www.newyorker.com/reporting/2010/08/02/100802fa_fact_gawande

Long-Term Services and Supports

Medicaid: A Program of Last Resort for People Who Need Long-Term Services and Supports by Donald Redford and Wendy Fox-Grage, AARP Public Policy Institute, May 2013.

<http://www.aarp.org/health/medicare-insurance/info-05-2013/medicaid-last-resort-AARP-ppi-health.html>

The Aging of the Baby Boom and the Growing Care Gap: A Look at Future Declines in the Availability of Family Caregivers. By Donald Redfoot, Lynn Feinberg, Ari Houser, Public Policy Institute, August, 2013

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A Call to Action: What Experts Say Needs to Be Done to Meet the Challenges of Family Caregiving, by Susan c. Reinhard, Lynn Feinberg, and Rita Choula, AARP Public Policy Institute, February 2012.

http://www.aarp.org/content/dam/aarp/research/public_policy_institute/ltc/2012/Spotlight-Paper-Meeting-the-Challenges-of-Family-Caregiving-AARP-ppi-ltc.pdf

Long Term Care Reform in Hawaii: Report of the Hawaii Long Term Care Commission, January 18, 2012

<http://www.publicpolicycenter.hawaii.edu/documents/HawaiiLTCCFinalReport.pdf>

What do you mean I'm getting old? Denial About Aging and Our Impending Long-Term Care Crisis, by Bruce Chernof, MD Perspectives on Aging with Dignity, the SCAN Foundation.

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Current Issues and Potential Solutions for Addressing America's Long-Term Care Financing Crisis by Gretchen Alkema, The SCAN Foundation, March 2013.

http://www.thescanfoundation.org/sites/thescanfoundation.org/files/tsf_ltc-financing_overview_alkema_3-20-13.pdf