

TO: Strategic Action Planning Group on Aging Members
FROM: Strategic Action Planning Group on Aging Executive Committee
DATE: October 20, 2016
RE: **Format for November Strategic Plan and Recommendations**

The Executive Committee met after our last full meeting to review our progress and do a reality check on whether we are on course to meet our legislative mandate to provide a draft plan by the end of November that makes clear and actionable recommendations to the Governor, the General Assembly and other key actors.

We agreed that we are farther along in some areas than in others and that it would be a disservice to ourselves as well as to the Governor and the General Assembly to forward all of the recommendations in their current form.

Instead, we would like to propose a revised format for the draft report for the SAPGA to consider at its meeting on Monday, Oct. 24. This memo outlines the new format as well as our rationale for proposing it. This memo also outlines the limited number of recommendations we, by majority vote, feel should be included in this first draft. We look forward to discussing — and approving — the specific recommendations the full SAPGA agrees to at the meeting this Monday

Proposed New Format and Rationale

Instead of a draft plan with a chapter or section for each of the eight goals of the plan, we propose a draft in three sections.

Section 1 would outline why aging is such a critical issue and what we have learned about it in our first year + of work. This will provide the strongest case we can make for the need for a long-term strategic plan, supported by the findings of our committees and contractors to date.

Section 2 would present the goals we have identified and explain the importance of and rationale for each. It would also explain the work we intend to do on each moving forward. In a sense, this section would outline where we are in the process and provide the strongest case for continuing our work (and for the state as well as foundations to support it financially).

Section 3 would give a series of specific recommendations for action this year. These will not be all or even most of the recommendations we have discussed. Instead, they will be the ones we think are ready for action and/or are largely essential to lay the groundwork for the success of the larger plan.

This format will allow us to provide a meaningful structure for understanding the challenge and moving forward as a planning group. It will also allow us to lay out critical first-step recommendations without claiming to be covering all the bases or providing an equal number of recommendations per goal. We believe some of the draft recommendations we reviewed over the past several meetings require more

work before we can present them or suggest specific action, and this format will give us the opportunity to spend more time on those issues before making formal recommendations.

Proposed Priority Recommendations for November 2016 Action Plan

Here are recommendations offered as candidates for inclusion in the draft plan as outlined above. We will discuss these at the meeting on Monday. Our goal is to make final decisions about what to include so that Keystone can move forward in drafting a document for us to work with.

Recommendation 1: The Governor should create a permanent, high-level office or position within the executive branch to oversee the state government’s work on aging issues. The Governor should propose and the General Assembly should consider legislation to grant this new office or position the authority and capacity to:

- a. Set consistent statewide policy priorities;
- b. Coordinate the aging-related work of state agencies and workgroups;
- c. Help the state coordinate effectively and consistently with federal and local partners — and learn from the experiences of other states;
- d. Maximize efficiency and cost-effectiveness of state expenditures;
- e. Identify gaps and unmet needs;
- f. Identify and help develop innovative new financing mechanisms, including utilizing opportunities for matching funding; and,
- g. Help drive public education efforts concerning the effects of aging in Colorado

The Colorado Legislative Council should consider establishing a similar and parallel high-level mechanism and process for tracking and coordinating aging issues as well as educating individual lawmakers.

Recommendation 2: The Governor’s Office of State Planning and Budgeting and the Colorado Legislative Council staffs should work together to compile a comprehensive state budget on aging to identify all state expenditures related to aging issues (including revenue expenditures such as tax credits) as a tool to help policymakers plan and prioritize at the state level. These efforts should also include identification of major long-term trends in state expenditures related to aging (including Medicaid expenditures) as a component of any long-term state fiscal planning.

Recommendation 3: The General Assembly should take the following three specific steps to increase retirement savings by Coloradans of all ages:

- a) Establish minimum standards for employers who offer defined contribution retirements plans (such as 401K plans). These standards should emphasize the essential ingredients of availability, automatic enrollment, automatic investment, and automatic escalation.
- b) Create a public-private partnership to design and offer a workplace retirement saving plan for employees who currently do not have access to one. This plan should be portable and should emphasize the essential ingredients of availability, automatic enrollment, automatic investment, and automatic escalation.

- c) Fully meet the state’s obligations to fund the retirement plans of its own employees and to ensure that PERA remains solvent over the long-term.

Recommendation 4: The General Assembly and the Governor should work together to identify or create a statewide commission or entity with the authority and capacity to develop and support aggressive financial literacy programs relevant to Coloradans of all ages, locations and circumstances.

Recommendation 5: As key first steps in helping communities reinvent themselves so that Colorado seniors have more opportunities to age in place and remain active, the General Assembly should take the following steps to build on promising existing efforts:

- a) Support and fund the Colorado State University Built Environment Institute in the development of a Universal Design Certification program to encourage the inclusion of universal design elements in new and remodeled housing for seniors. This should include adequate resources to pilot this process with the Partnership for Age Friendly Communities in Larimer County and to share and promote the lessons of that pilot program with communities throughout Colorado.
- b) Support the Colorado Department of Transportation’s (CDOT) State Coordinating Council in coordinating among the wide range of programs that help serve the transportation needs of Colorado’s aging population. The Council should be specifically charged with making specific regulatory, legislative and funding recommendations to improve the reach, effectiveness and efficiency of existing programs.

Recommendation 6: As a first step to ensure Colorado’s future workforce is adequate to meet the needs of an aging population, the General Assembly should authorize and direct an appropriate state agency to conduct a study of workforce needs specific to nursing homes, assisted living communities, home health agencies and other paid caregivers (nonprofit and individual), including estimates of future use of those particular care settings, given demographic trends.

Recommendation 7: To provide support to the growing number of Colorado workers who are also caregivers for aging loved ones, the General Assembly and Governor should take two concrete steps:

- a) Establish family leave policies that set standards for compensating employees who are caring for aging family members. This might include a Temporary Caregiver Insurance Program through employee payroll deductions, as several other states have done.
- b) Create and promote a partnership among state and local governments, employer groups and educational institutions to identify and promote best practices for educating and supporting employees who are also caregivers.

Recommendation 8: The General Assembly should work with the appropriate regulatory agencies to ensure state laws and regulations are adequate to protect consumers, including seniors, from predatory financial practices. In particular, the General Assembly and the Governor should:

- a) Support US Department of Labor rules to protect workers from business practices that cost American families excess fees and charges;
- b) Support the Colorado SeniorSafe Program developed by the Colorado Division of Securities and Division of Banking and Financial Services.

Recommendation 9: The Governor and General Assembly should implement the recommendations made by the Respite Care Task Force in their January 2016 report for:

- a. statewide training,
- b. website with respite care locator, outreach and communications campaign
- c. funding the recommended pilot program, and
- d. a study to demonstrate the return on investment of respite care services, which will build the care for future funding for respite care services.

Recommendation 10: To ensure older adults are free from abuse, neglect and exploitation the following steps should be taken:

- a) Ensure quality, effective Adult Protective Services (APS) are available and provided to all vulnerable adults in Colorado.
- b) Establish a State Office of Guardianship.
- c) Support programs to raise awareness and train law enforcement personnel, district attorneys, service providers, caregivers and other key audiences in how to identify and prevent elder abuse.
- d) Implement key recommendations from the Office of Public Guardianship Advisory Committee (PGAC), and the Senate Bill 109 Task Force.