

# Getting Started with a Master Plan for Aging: Strategies to Build Buy-in within States

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## Agenda

- Welcome and Introductions
- Getting Started with a Master Plan for Aging
  - What is a Master Plan for Aging?
  - The Benefits of a Master Plan for Aging
  - Eight Building Blocks for Getting Started with an MPA
- California's Experience Building Buy-in for a Master Plan for Aging
- Q&A



# Welcome & Introductions

## Meet Today's Presenters



**Megan Burke**  
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# What is a Master Plan for Aging?

## What is a Master Plan for Aging (MPA)?

An MPA is a **cross-sector, state-led strategic planning resource** that can help states transform the infrastructure and coordination of services for their rapidly aging population.

It is a living document that:

- Provides a clear framework to plan for 10 years or more
- Enables governors and/or legislative leaders to communicate a clear vision and priorities for their state
- Guides state/county/local policy, public/private programs, and funding toward aging with dignity
- Reflects extensive input from the community, including people of all ages and abilities, actively considering the needs of populations facing racial and ethnic disparities in aging

## Benefits of Developing a Master Plan for Aging

- ✓ Build bridges across government agencies and departments
- ✓ Facilitate collaboration with diverse stakeholders
- ✓ Promote equity and combat bias and discrimination
- ✓ Raise awareness among policymakers and the public about how aging and disability-related policy impacts people at all stages of life
- ✓ Establish statewide priorities to respond to unanticipated and urgent events
- ✓ Create academic, research, and other partnerships that bring aging and gerontology experts to the forefront and ensure evidence-based planning
- ✓ Incorporate an aging and disabilities lens across state priorities beyond traditional health care and community services

## Goals of the *Getting Started with an MPA Tool*

# Using the MPA *Getting Started* Tool

## Who can use this tool?

- Anyone can use this tool
- Focus on stakeholders seeking to gain buy-in and encourage an executive order or legislation to begin the MPA process
  - E.g. state officials, advocates, industry, and philanthropic organizations

## Goals of the *Getting Started* Tool:

**GOAL 1: SECURE STATEWIDE EXECUTIVE LEADERSHIP AND CROSS-AGENCY ENGAGEMENT**

**GOAL 2: ENGAGE STATE LEGISLATORS TO CREATE LASTING CHANGE**

# Eight Building Blocks for Getting Started with an MPA

## Eight Building Blocks for Getting Started with an MPA



1. Recruit champions dedicated to advancing the MPA



2. Leverage public and private resources to make the case for an MPA



3. Communicate strategically to gain broad support for an MPA



4. Leverage data to identify unmet needs and establish metrics for success



5. Engage state agencies serving older adults and people with disabilities



6. Identify and align common goals across stakeholders



7. Collaborate with and build on existing age-related initiatives



8. Identify events that highlight the need for an MPA

# Recruit Champions Dedicated to Advancing the MPA



- Identify public- and private-sector champions.
- Champions can be from state agencies, the legislature, community-based organizations, and/or philanthropic organizations.

Effective MPA champions will:

- Commit staff time and resources to secure commitment for the MPA.
- Have relationships and the “know how” to mobilize policymakers to commit to an MPA.
- Be willing and able to drive an MPA buy-in campaign forward and coordinate efforts across stakeholders.

# Leverage Public and Private Resources to Make the Case



## Financial Supports:

- Funding from philanthropic organizations for consultant support for strategic communications to build a campaign and public awareness about the need for an MPA.
- Funding to engage stakeholders and conduct public “listening sessions.”
- Funding from state budget allocations dedicated to developing an MPA.

## In-kind Supports:

- State or regional advocacy and stakeholder groups can donate time to an MPA campaign effort.
- Health systems and provider associations can contribute their subject-matter expertise regarding what it will take to care for the aging population.
- Labor groups and associations can express their interest in bolstering protections for the older workforce and direct-care workers.
- Private industries can communicate their interest in supporting their employees in caregiving and retirement planning.
- Academic organizations and thought leaders can contribute research and data analysis.

# Communicate Strategically to Gain Broad Support



Opportunities to support strategic communications:

- Voter polling and paid and earned media
- Targeted flyers or “leave behind” materials for legislators
- Op-eds in local newspapers and statements of support from local leaders
- Collections of stories as print or audio features

# Communicate Strategically to Gain Broad Support



## Messaging ideas that support an MPA

- **Everyone is Aging**
- **Inclusivity and Equity**
- **Cross-Sector Planning and Implementation**
- **Person-Centered**
- **Accountability to Implementation**
- **Living Document**

# Leverage Data to Identify Unmet Needs and Establish Metrics for Success



## Useful data to support the creation of an MPA include:

- Demographic projections
- State or national datasets on unmet needs
- Waiting lists for home- and community-based services

## Examples of datasets to leverage:

- The AARP Long-Term Services and Supports State Scorecard
- National datasets including the Behavioral Risk Factor Surveillance System, the National Health and Nutrition Examination Survey, the Health and Retirement Study, and the U.S. Census
- The National Council on Aging Elder Economic Security Index
- State datasets including Geographic Information System (GIS) data, data dashboards, and outcomes tracking tools

# Engage State Agencies Serving Older Adults and People with Disabilities



- Most government agencies and departments have jurisdictions that affect older adults or will be impacted in the future by shifting demographics.
- It is important to engage multiple state agencies to secure buy-in for an MPA.

## Important State Agencies to Engage Include:

- Departments of Health
- Departments of Aging
- Departments of Rehabilitative Services
- Departments of Housing
- Departments of Transportation
- Departments of Labor and Workforce Development
- Attorney General's Offices
- Secretaries of State
- Treasury Departments

## Identify and Align Common Goals Across Stakeholders



- There are many stakeholders that have a strong interest in improving the aging landscape, including:
  - Consumers
  - Family caregivers
  - Aging and disability advocates
  - Direct-care workers and unions
  - Health care providers
  - Faith leaders
  - Private industry executives
  - Community-based organizations
  
- Diverse voices should be included, with stakeholders representing varying racial, ethnic, and linguistic backgrounds, rural areas, gender identities, and sexual orientations.

## Collaborate with and Build On Existing Age-Related Initiatives



MPAs do not replace existing age-related initiatives but rather strengthen them by elevating common goals and connections across initiatives.

Initiatives that can be leveraged include but are not limited to:

- **State Plans on Aging**
- **Age-Friendly Initiatives**
- **Dementia-Friendly Communities**
- **Olmstead Decision**
- **Long-Term Services and Supports (LTSS) Reform**
- **Local, County, or State Aging Commissions**



## Identify Events that Highlight the Need for an MPA

Previously scheduled activities, as well as unplanned events (e.g., news events, new federal funding, public emergencies), can present opportunities to spotlight the need to implement an MPA.

These events can include:

- **Gubernatorial elections**
- **Emergencies and crises**
- **New federal resources**
- **Viral media stories and breaking news**

# California's Experience Building Buy-In for a Master Plan for Aging



# Strategic



# Leadership



# Responsive



# Partnership



# Elevated



# Inclusive

Questions?

# Resources

## • Contact Us

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Download the **Getting Started with a Master Plan for Aging Tool**:

<https://www.chcs.org/resource/getting-started-with-a-master-plan-for-aging/>

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 Center for Health Care Strategies

## Getting Started with a Master Plan for Aging

*By Carrie Graham and Amy Hoffmaster, Center for Health Care Strategies and Beccah Rothschild, Health Engagement Strategies*

**TAKEAWAYS**

- As the U.S. population **gets older** and **increasingly diverse**, state leaders and stakeholders recognize the need to conduct high-level, cross-sector planning efforts to ensure that the needs of older adults, people with disabilities, and family caregivers are met over the coming decade.
- A Master Plan for Aging (MPA) is one such approach to planning. This tool describes why an MPA is an effective approach, outlines its core goals, and details eight strategies or “building blocks” to generate buy-in and momentum for an MPA.
- Policymakers, advocates, industry leaders, and other stakeholders can use all or some of the building blocks to move their state to achieve the goals of a governor’s executive order and/or legislation calling for an MPA.

**B**y 2030, an estimated one in five Americans — over 73 million people — will be over age 65. By 2060, that number will grow to **close to 95 million**. Additionally, the U.S. older population is **becoming more diverse** — with the proportion of people in racial and ethnic minority groups increasing from 23 percent of the older adult population in 2018 to about 34 percent of the population in the next two decades. These demographic shifts will have a profound impact on the volume and types of services and supports that states provide to older adults and people with disabilities, as well as family caregivers. It is essential to provide resources and services to help all people thrive as they grow older — inclusive of race, gender identity, sexual orientation, physical or mental abilities, religious beliefs, socioeconomic status, country of origin, and language.<sup>1</sup>

States, counties, cities, and local communities increasingly recognize the importance of planning for upcoming demographic shifts. A Master Plan for Aging (MPA) is a process whereby the state leads high-level, cross-sector planning across various domains, including but not limited to: age and disability-friendly health systems; a caregiver workforce that is robust and respected; and affordable, accessible housing, transportation, digital access and training, and more.

This *Getting Started* tool defines an MPA, describes the benefits and key goals for pursuing such an approach, and outlines key building blocks that state leaders, advocates, stakeholders, and industry leaders can implement to generate buy-in and momentum for an MPA in their state.



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