Center for Health Care Strategies

Getting Started with a Multisector Plan for Aging

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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 multisector 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.[1]

States, counties, cities, and local communities increasingly recognize the importance of planning for upcoming demographic shifts. A multisector plan for aging (MPA)[2] 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.

What is a Multisector Plan for Aging?

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:

1. Provides a clear framework to plan for 10 years or more;

2. Enables governors and/or legislative leaders to communicate a clear vision and priorities for their state;

3. Guides state/county/local policy, public/private programs, and funding toward aging with dignity;[3] and

4. 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 Multisector Plan for Aging

An MPA has clear benefits for older adults, people with disabilities, and family caregivers. However, it also can have very positive impacts for people of all ages, industry, academia, and state government. An MPA can:

- **Build bridges across government agencies and departments** — most of which have policies that impact older adults and people with disabilities — to support cross-sector planning and implementation.

- **Facilitate collaboration with diverse stakeholders,** including consumers, families, and individuals representing aging and disability communities, public and private sectors, labor, health care, and academic research to help identify shared values, mutual goals, and opportunities to improve person-centered supports and services.

- **Promote equity and combat bias and discrimination** through policy and funding priorities as well as messaging and communication campaigns.

- **Raise awareness among policymakers and the public** about how aging and disability-related policy impacts people at all stages of life, including retirement planning, family caregiving, and living with disabilities.

- **Establish statewide priorities** to quickly respond to unanticipated and urgent events, such as emergencies, pandemics, and budget deficits or surpluses.

- **Create academic, research, and other partnerships** that bring aging and gerontology experts to the forefront of policy influence and ensure evidence-based planning.

- **Incorporate an aging and disabilities lens across state priorities beyond traditional health care and community services** to include climate change, the digital divide, rural health, mental health, and employee-friendly business policies.

Using the Multisector Plan for Aging *Getting Started* Tool

Who can use this tool? Anyone can use this tool, although the focus is on stakeholders seeking to gain buy-in and encourage an executive order or legislation to begin the MPA process — including state officials, advocates, industry, and philanthropic organizations.

What are the goals of this tool? This tool is designed to help states move toward: (1) an executive order for an MPA; and/or (2) legislation that calls for an MPA, as explained below:

GOAL 1: Secure Statewide Executive Leadership and Cross-Agency Engagement

Leadership from a governor can jump start an MPA-development process. Ideally, governors will endorse the MPA and issue an executive order. Prioritizing collaboration with state staff can help ensure continuity of the MPA throughout changes in gubernatorial administrations. A governor's office can support cross-agency partnerships and connect with private and independent-sector leaders.

Strategies for securing gubernatorial endorsement include:

- **Demonstrating the public support for an MPA** through data and polling.

- **Raising awareness during gubernatorial elections** to secure commitment from candidates.

- **Elevating the issue** through support of multiple stakeholders and coalitions.

EXAMPLES

- **Massachusetts** Governor Baker's executive order established the Governor's Council to Address Aging.

- **Texas** Governor Perry's executive order established the Aging Texas Well Initiative, Advisory Committee, and Strategic Plan.

- **California** Governor Newsom's executive order called for the development of a state MPA.

GOAL 2: Engage State Legislators to Create Lasting Change

Legislators can introduce bills to both start an MPA process and ensure implementation of the MPA's final recommendations. Champions at the legislative committee and leadership levels can build momentum for an MPA and propel executive agency action to call for an MPA. Strategies for mobilizing legislators include:

- **Engaging with legislators who have a personal interest or investment in aging issues**, such as those who are older adults, have disabilities, and/or are caring for older parents. Look for those who have been vocal about their experiences and may be willing to be a champion.

EXAMPLES

- In 2021, the **Vermont** Legislature passed a bill to develop the Vermont Action Plan on Aging Well.

- **Colorado** engaged lawmakers to support a legislated process that resulted in Colorado House Bill 1033 and created a strategic action planning group. Colorado also has a legislative caucus on aging that is led by state legislators in partnership with the Strategic Action Planning Group on Aging.

- **California** gathered community member and public input through community roundtables.

- **Working with legislators on relevant committees** such as aging, health care, transportation, housing, and workforce — or those who may hold hearings on aging-related issues to make the case for an MPA.

- **Reaching out to legislators championing key issues** and highlight the aging-related perspective on their topic of interest. For example, a legislator focused on public transportation or rural health care may not be aware of the needs specific to older adults.

- **Collaborating with legislators to draft bills** calling for the implementation of an MPA. Simultaneously ensuring gubernatorial support is important to facilitate enactment.

- **Partnering with legislators to host community roundtables** to garner public input and support.

Eight Building Blocks for Getting Started with an MPA

The building blocks outlined in this tool can help states pursuing an MPA to catalyze activities. Rather than implementing these strategies sequentially, stakeholders can prioritize one or more building blocks that seem most timely, valuable, and effective for their state.

For each of the eight building blocks, this section includes detailed suggestions and examples based on the experiences of states that successfully secured gubernatorial and/or legislative support for an MPA or similar initiative:

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.**

Initial questions to consider when reviewing the building blocks, include:

- Has my state begun or completed this step?

- Does an initiative, program, or evidence base already exist in my state that could be repurposed or updated to promote an MPA?

- What are the policy priorities of the governor or legislature that an MPA could promote?

EXAMPLES

- For a recently developed MPA in the early stages of implementation, see the **California** Master Plan for Aging.

- To learn more about **state examples** of an MPA and elements for success, see a policy brief from The SCAN Foundation.

As noted earlier, these building blocks do not need to be implemented consecutively. Depending on state context, existing infrastructure, and priorities, stakeholders can identify which building block(s) to pursue to set the MPA wheels in motion.

1. Recruit Champions Dedicated to Advancing the MPA

Identify public- and private-sector champions, especially those who can dedicate staff and resources to secure leadership and commitment for an MPA. Champions could include individuals from state agencies, the legislature, community-based organizations (CBOs), and/or philanthropic organizations. The champion(s) should focus on generating commitment from executive and legislative leaders and other key stakeholders.

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; and

- Be willing and able to drive an MPA buy-in campaign forward and coordinate efforts across stakeholders.

EXAMPLE

Many advocates in **California** who championed the effort to secure Governor Newsom's commitment to the MPA later dedicated their time to serving on the state's MPA Stakeholder Advisory Committee.

2. Leverage Public and Private Resources to Make the Case for an MPA

Making the case for an MPA requires resources for stakeholder engagement and strategic communications about why an MPA is needed. Public and private resources can be used to support efforts to build the case for an MPA.

Here are examples of how both financial and in-kind supports can be helpful:

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.

> **EXAMPLE**
>
> In **California**, The SCAN Foundation, with seven other funding partners, served as a major champion of the MPA effort. They engaged in a communications campaign to secure Governor Newsom's support and the support of diverse stakeholders.

In-kind Supports

Many stakeholders can donate their time to make the case for an MPA and communicate their support to the governor and/or legislature, including:

- State or regional advocacy and stakeholder groups can donate time 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;

> **EXAMPLE**
>
> **Massachusetts** developed private and public partnerships to engage technology and other industries that typically were not involved in aging work.

- 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; and

- Academic organizations and thought leaders can contribute research and data analysis.

3. Communicate Strategically to Gain Broad Support for an MPA

Effectively communicating the value of and need for an MPA is a critical component of gaining stakeholder buy-in. Developing strategic communications that are tailored to each audience can help raise awareness and develop executive (state) and legislative champions. Private-sector and philanthropic organizations may have the resources to engage a strategic communications firm to help tailor messaging that stakeholders can leverage to support buy-in for the MPA.

Opportunities to support strategic communications:

- **Voter polling and paid and earned media** to raise MPA visibility and demonstrate voter support and public interest to executive and legislative leaders.
- **Targeted flyers or "leave behind" materials** for legislators that describe the needs of older adults in their districts and polling results that demonstrate support for an MPA from constituents.
- **Op-eds in local newspapers and statements of support from local leaders** to raise public awareness and support for an MPA.
- **Collections of stories as print or audio features** to share at community meetings and personalize the need for an MPA.

Messaging Ideas that Support an MPA

- **Everyone is Aging**. An MPA is not just for older adults. It can prepare all of society to age, support family caregivers and younger people with disabilities, and make changes that benefit everyone.
- **Inclusivity and Equity.** An MPA should address language and cultural barriers to services and elevate policies that promote equity across race, class, gender identity, and sexual orientation. It should also aim to dismantle ageism and ableism.
- **Cross-Sector Planning and Implementation.** The MPA process can break down government silos and promote cross-sector solutions connecting agencies, departments, industry, and advocates.
- **Person-Centered.** An MPA prioritizes individuals' needs and preferences by addressing what matters most to older adults, people with disabilities, and family caregivers.
- **Accountability to Implementation.** An MPA is not another plan that sits on the shelf. The executive branch leads it with a focus on accountability, public reporting, and use of data to track outcomes.
- **Living Document.** While an MPA is typically a 10-year plan, it will evolve as needed for a changing landscape. It should be tracked over time and updated every two years to ensure relevance.

EXAMPLES

- Materials prepared for a joint hearing in the **Vermont** Legislature demonstrated the challenges an MPA could address, and elements in existing Vermont reports that could provide the foundation for an MPA.
- Results from **California** polling data signaled support for an MPA and investments in aging-related services.
- The SCAN Foundation developed an infographic directed at Governor Newsom that highlighted **California** voter support for an MPA and included examples of other states with MPAs.

4. Leverage Data to Identify Unmet Needs and Establish Metrics for Success

Projecting demographic changes and current and future unmet needs can help define and demonstrate the need for an MPA. It can also help in gathering support. Once relevant data have been identified, those data can also provide baseline information for the future creation of a Data Dashboard on Aging. This can give state leaders confidence that MPA progress will be tracked over time using state-level data.

Useful data to support the creation of an MPA include:

- **Demographic projections on state aging and disability populations** that may be available from federal agencies, a state legislative analyst office, county offices, or universities. Data should demonstrate the projected changing needs of the state's aging populations in the coming decades.

- **State or national datasets that collect information on the unmet needs of older adults and people with disabilities.** These can be analyzed to produce state-level projections on the future needs for housing, health care, transportation, and long-term services and supports, just to name a few.

- **Waiting lists for home- and community-based services and other data** can be used as proxies to demonstrate current unmet needs for services that are likely to expand as the state's population gets older.

EXAMPLES

- AARP's Long-Term Services and Support State Scorecard ranks states across five dimensions using 26 indicators. The scorecard can be used to motivate state leaders to improve services or build on successes.

- National datasets including the Behavioral Risk Factor Surveillance System, National Health and Nutrition Examination Survey, Health and Retirement Study, and U.S. Census can be analyzed for state-level data.

- The National Council on Aging Elder Economic Security Index is a tool that states can use to identify and project the economic security of their aging populations.

- State datasets including Geographic Information System (GIS) data, data dashboards, and outcomes tracking tools can be used for planning. Examples include: **Hawaii** age-friendly maps and GIS data; **Washington** Department of Social and Health Services interactive data dashboards; **California** Health Interview Survey; and **Vermont** Disabilities, Aging, and Independent Living results based accountability scorecards and performance dashboards.

5. Engage State Agencies Serving Older Adults and People with Disabilities

Support for an MPA will be strongest when there is engagement from all agencies with policies and programs that impact the lives of older adults, people with disabilities, and family caregivers. Most government agencies and departments, even when they are not specific to aging, have jurisdictions that affect older adults or will be impacted in the future by shifting demographics. It is important to engage multiple state agencies (e.g., departments of health, aging, rehabilitative services, housing, transportation, labor and workforce development, as well as Attorney General's Offices, Secretaries of State, and treasury departments) to secure buy-in for an MPA.

EXAMPLES

- **Colorado's** largest Area Agency on Aging, AARP state office, and a local policy advocacy body collaborated with legislators to draft legislation authorizing their MPA.

- **California** advocates created a Periodic Table of aging-related programs to demonstrate how services and programs impact aging populations even when they may not explicitly focus on older adults.

6. 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, and CBOs.

To advocate for an inclusive and comprehensive MPA, efforts must be made to bring these stakeholders together and align around common, high-level goals. Diverse voices should be included, with stakeholders representing the demographics of the state, including populations of varying racial, ethnic, and linguistic backgrounds, rural areas, gender identities, and sexual orientations.

EXAMPLES

- **Colorado** hosted regional Conversations on Aging as a community-based public engagement strategy and continued to host these yearly, including during the COVID-19 pandemic. These conversations included older adults, people with disabilities, families, caregivers, and stakeholders affiliated with the aging network.

- In **California**, disability advocates, such as Disability Rights California, were engaged in efforts to secure buy-in for an MPA. They later developed key principles to guide their participation in MPA development to ensure that it focused on the needs of individuals aging with disabilities.

- The **Massachusetts** Governor's Council to Address Aging created workgroups that involved both public and private sectors. Workgroup members included AARP, family caregivers, health plans, CBOs, medical technology vendors, universities, state-agency employees, local councils on aging, and senior living centers.

- When the Aging **Texas** Well Initiative was formally established, it created the Aging Texas Well Advisory Committee. The committee represents older adults, family caregivers, Area Agency on Aging members, Aging and Disability Resource Center members, and other service providers and advocacy organizations.

7. Collaborate with and Build On Existing Age-Related Initiatives

In order to secure buy-in, it is important to emphasize that MPAs do not replace existing age-related initiatives but rather strengthen them by elevating common goals and connections across initiatives. Efforts to promote buy-in for an MPA should include identifying other efforts and reaching out to stakeholders who championed previous work. It is important to highlight the success of existing efforts and the benefits of building on that foundation. Initiatives that can be leveraged include but are not limited to:

- **State Plans on Aging.** The federal government requires each U.S. state to submit a State Plan on Aging every four years to the Administration for Community Living. This requirement is tied to the Older Americans Act, which authorizes federal funding for programs. These plans are typically developed by each state's Division of Aging; the existing procedures, content, and stakeholder networks can be leveraged as a foundation when creating an MPA.

- **Age-Friendly Initiatives.** AARP's Age-Friendly Network is a collective of states and jurisdictions (e.g., cities, counties) that have demonstrated a commitment to actively work toward making their communities a great place to live for people of all ages. To receive a public "Age-Friendly" designation, the community's elected leadership must commit to working with residents and local advocates to make its location an age-friendly place to live. States already working toward Age-Friendly goals can use these efforts as a steppingstone to advocate for a broader MPA process. The development process of an MPA can also be leveraged toward becoming an Age-Friendly state.

EXAMPLES

- **Minnesota** is leveraging the State Plan on Aging stakeholder engagement process for planning its Minnesota 2030 initiative. Minnesota's 2030 initiative includes a gubernatorial Executive Order to establish the Governor's Council on an Age-Friendly Minnesota.

- **Connecticut** has a long-standing Long-Term Care Planning Committee.

- **Indiana** launched stakeholder engagement activities focused on LTSS reform.

- The **North Carolina** Olmstead Plan Stakeholder Advisory Group includes consumer, family, and advocacy groups; multiple divisions from the Department of Health and Human Services; professional organizations and agencies; and members of the North Carolina General Assembly.

- **California**'s MPA planning team partnered with the Governor's Task Force on Alzheimer's Prevention, Preparedness, and Path Forward to ensure recommendations were aligned across the initiatives.

- **Dementia-Friendly Communities.** The Alzheimer's Association and other advocates for individuals with dementia endorse Dementia-Friendly Communities, a planning process that helps communities take steps to be more inclusive for people with Alzheimer's disease or related dementias.

- **Olmstead Decision.** The U.S. Supreme Court's 1999 landmark decision in Olmstead v. L.C. (Olmstead) found that unjustified segregation of people with disabilities is a form of unlawful discrimination under the Americans with Disabilities Act. The federal government oversees state efforts to comply with the Olmstead Act, with states periodically required to update their Olmstead Plans to support people living in

the community. States with existing Olmstead Stakeholder Advisory Committees include many of the same stakeholders for an MPA development effort.

- **Long-Term Services and Supports (LTSS) Reform.** Several states have recently undertaken major efforts to restructure LTSS systems to rebalance services to create more home- and community-based options, reduce fragmentation and duplication, and integrate care. Some pursue reform through Medicaid-managed LTSS and by aligning care for people dually eligible for Medicare and Medicaid. These efforts can be a starting point for expanding to a broader MPA effort.

- **Local, County, or State Aging Commissions.** Aging commissions serve as the primary advisory bodies on matters that impact older adults at the local, county, and state levels. These trusted advisors are well-versed in the key aging challenges and activities in their communities. An MPA can build on the historic work that these commissions have performed, and use their findings and efforts as a starting point to understanding the needs and current landscape of aging individuals in their state.

8. 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** that provide opportunities for candidates to endorse an MPA;

- **Emergencies and crises**, such as the COVID-19 pandemic, that can elevate public and private understandings of system gaps for older adults and create opportunities for transformation;

- **New federal resources**, such as funding from the _American Rescue Plan Act_ that can help fund MPA development and implementation; and

- **Viral media stories and breaking news** that uncover or highlight problems impacting older adults and can act as a lightning rod to bolster support for an MPA.

EXAMPLES

- **California** gubernatorial candidates made public endorsements of an MPA during the 2018 election cycle.

- Media and news outlets extensively covered the severe impact of COVID-19 in nursing homes and the growing desire of older adults to age at home.

Conclusion

Older adults, people with disabilities, and family caregivers are valuable members of our states and communities. Many want to remain active and engaged while living independent lives. As this demographic grows and becomes more diverse, it is critically important to plan for and meet as many anticipated needs as possible — with an equity lens embedded in all decision-making. This *Getting Started* tool can help states build engagement and buy-in to set the stage for state leadership in and commitment to MPA development and implementation. It offers building blocks and examples that other states have tried and tested, all designed to be "mixed and matched" depending on state priorities and context — allowing each state to choose steps that best meet its needs to create a unique path for developing their own MPA.

ENDNOTES

[1] Advancing Equity in Law and Policy. Justice in Aging. Accessed September 1, 2021, from https://justiceinaging.org/advancing-equity-in-law-and-policy/.

[2] Multisector plan for aging is an umbrella term for a state-led, multi-year planning process that convenes cross-sector stakeholders to collaboratively address the needs of older adults and people with disabilities. States use a variety of names for these plans (e.g., master plans, strategic plans, and aging-well plans) but all have the same broad goals.

[3] Building a Master Plan for Aging: Key Elements from States Planning for an Aging Population. The SCAN Foundation. October 2021. https://www.thescanfoundation.org/publications/building-a-master-plan-for-aging-key-elements-from-states-planning-for-an-aging-population/