**Affording Aging Meeting Notes**

**2:15-2:30pm: Introduced workgroup leadership**

* Introduced co-leads and champions of workgroups:
  + Co-Lead: Suzanne LaFollette-Black, AARP NC
    - Suzanne LaFollette-Black has over 40 years of experience in gerontology.
    - Her career includes roles as a nursing home administrator, Area Agency on Aging Director, and AARP State Director.
    - She retired but remains active in various organizations and initiatives.
    - Suzanne co-founded ENCORE Sentimental Journey Singers for dementia caregivers.
    - She serves on boards, including NCAOA, and has received awards for her work.
    - She hosted the AARP Meet Nannie and Grammy FB Live show.
  + Co-Lead: TBD
  + Steering Committee Champion(s): Lisa Riegel, AARP NC and Sarajane Melton, Southwestern Commission, Area Agency on Aging
    - Lisa:
      * Manager of Advocacy and Livable Communities at AARP North Carolina
      * Leads state and local advocacy efforts in health, financial security, transportation, and affordable housing
      * Previous experience as executive director at BikeWalk NC, promoting walkability and cyclist-friendly initiatives.
      * Nearly a decade at the Secretary’s Office of the Department of Natural & Cultural Resources
      * Graduated from Duke University with a BS in geology and holds an MS in Engineering Geology from Drexel University (Also has a Certificate in Nonprofit Management from Duke University)
    - Sarajane:
      * BSW from Western Carolina University in 1984, MHS in Gerontology from the same university in 2010
      * Worked at Southwestern Commission Area Agency on Aging since 1997
      * Served as LTC Ombudsman from 1997-2013, became Director of AAA in December 2013
      * Adjunct faculty member in the Social Work Department at Western Carolina University
      * Previous roles include work with Department of Social Services, REACH of Jackson County, Guardian ad litem, Park Avenue Adult Day Program, and Disability Partners in South Carolina
* Introduced the participants to one another and encourage them to briefly share their experiences and motivations for participating:
  + *What elements within this domain or workgroup captured your attention?*
  + *Are there specific focus areas where you possess expertise or a strong interest?*
    - In-person workgroup members were diversely represented
      * Passionate towards retirement planning, advocacy, financial planning, volunteerism/community engagement, life-long learning, and ageism awareness etc.
    - Missing business perspectives, financial planners and insurers, county commissioners, municipalities, cooperative extension, funders, legislative champions, mayors of rural areas, veteran community, libraries, state and local chambers, and community colleges (noted that not all members are in attendance today so there may be representatives that fill these sectors; discussed we may need to think about creatively integrating missing voices by inviting them as guest speakers etc.)
      * Discussed that an email template will be developed and shared for workgroup members to invite missing voices.

**2:30-2:45pm: Provided an overview of MPA, domain, and timeline**

* Shared MPA definition:
  + A cross-sector, state-led strategic planning resource that can help states transform the infrastructure and coordination of services for their rapidly aging population, as well as people with disabilities.
* Provided overview of All Ages, All Stages NC:
  + The All Ages, All Stages NC initiative is a comprehensive effort aimed at addressing the needs and challenges associated with aging in North Carolina. The initiative recognizes the importance of collaboration and coordination across various sectors to ensure that individuals of all ages and stages can age well and thrive in their communities.
  + The plan encompasses four key stakeholder workgroups: Strengthening Communities for a Lifetime, Optimizing Health and Wellbeing, Supporting Older Adults and Their Families, and Affording Aging.
* Reviewed goal statement of Affording Aging:
  + *North Carolinians will have the means to effectively plan for their later stages of life, ensuring sufficient and sustainable financial provisions, fostering avenues for personal growth and advancement, and actively contributing their knowledge and expertise to the betterment of their communities. This workgroup addresses financial planning, personal growth opportunities, and community engagement for aging individuals.*
* Shared workgroup timeline
  + Workgroups are to convene from September – February
  + Workgroups are to produce a report with recommendations by end of February, by looking closely into existing/current initiatives/ recommendations to elevate priorities.
  + The first two-year outcomes of the ten year plan are due March 2024.

**2:45-3:00pm: Review focus areas for this domain**

*Presented a preliminary list of identified focus areas and discussed areas for modification, additions, or potential exclusions (Organized the seven focus areas into five; discussed that we may need to think about where technology and innovation belongs)*

*Emphasized the dynamic nature of the focus areas, noting that it may evolve in response to emerging issues or developments.*

*Discussed that if workgroup members are interested in co-chairing one of the five subgroups, email Suzanne/Lisa.*

* Baked inclusion and equity into all focus areas instead of as a separate   
  “bucket”/subgroup focus area (ensuring equal opportunities, access, and representation for aging individuals from diverse backgrounds and marginalized communities)
* (1) Financial Preparation: Emphasizing retirement planning, saving options, and income assistance programs to support financial stability during the aging process. – Chris Brandenburg, co-chair
* (2) Workforce Opportunities: Addressing both paid and unpaid work options for older adults, including employment retraining programs, flexible work arrangements, and promoting age-friendly workplaces.
  + Discussed the importance of adding ageism awareness into workforce opportunities.
  + Discussed distinction between workforce opportunities and workforce development
* (3) Merged Lifelong Learning and Leadership Development:
  + Lifelong Learning: Promoting educational resources and lifelong learning initiatives that enable continuous personal and professional development for aging individuals + Leadership Development: Supporting the development of leadership skills among older adults, enabling them to contribute actively in decision-making processes and take on leadership roles in various spheres of society.
  + Merged statement: Fostering continuous personal and professional development, including lifelong learning and leadership skill development, among aging individuals to empower their active participation in decision-making and leadership roles across society.
* (4) Intergenerational Engagement: Encouraging volunteerism, engagement opportunities, and collaboration between different generations to foster social connections, mutual support, and knowledge-sharing.
* (5) Sustainability of Public Services: Addressing the sustainability of the service expansion and innovations made possible during the pandemic and recovery period via temporary federal American Rescue Plan Act funding. – AAA representative, co-chair
  + Discussed the importance of revising the funding formula (HCCBG) being integrated into sustainability planning.

**3:00 – 3:30pm: Share existing initiatives and recommendations**

*Provided an overview of ongoing initiatives within the state pertaining to Affording Aging. Informed workgroup members to review pertinent sections in preparation for the upcoming meetings.*

*Conveyed that while certain aspects, like the Healthy Aging Task Force recommendations, are already well-developed, they should deliberate on whether to allocate substantial time to these or focus on unaddressed issues.*

* Reviewed existing initiatives that have already been categorized into the potential focus areas.
* Discussed that we need to pull in other initiatives (Ex. Serious Illness Taskforce, Institute for Emerging Issues) & existing curriculums for workforce development.
* Discussed that we need to expand upon some of the existing recommendations under financial preparation (fraud prevention, education on financial literacy, payroll deduction for retirement)
* Discussed that some of the STHL priorities regarding LTC staffing standards/LTC Ombudsman may fit under another group, but our group should address some of the root causes of the problems (equitable pay/increasing wages with SCCEP program/addressing adequate aging workforce)

**3:30 – 3:45pm: Review workgroup expectations**

*Briefly reviewed draft charter to ensure workgroup members understand their roles and expectations and agree upon communication guidelines while serving on this workgroup and determine next steps for establishing future meetings.*

* Reviewed charter template
* Decided meeting schedule:
  + Suggested having at least two virtual meetings per month.
  + Shared that we will follow up to determine the days/times via email through a doodle poll as consensus on day was not determined.
    - Mentioned that not everyone will be able to attend every meeting but that meeting dates will be scheduled to occur on a regular basis so people can hopefully adjust their schedules accordingly.