Year 1 Quarter 1 Implementation Subgroup Report

The NC Multisector Plan for Aging, All Ages, All Stages, NC was published in September 2024. Since then, the focus has shifted from planning to implementation, as the state and its partners begin to execute the plan's priorities, monitor progress, and adjust as needed to improve outcomes for all North Carolinians as they age. We have now completed Quarter 1 for our first year of implementation.

We extend our sincere gratitude to all who have been involved in this initial phase of implementation. We thank our Workgroup Leads, Deryl Fulmer, Janice Tyler, Bill Lamb, Lee Dobson, Jenisha Henneghan, Kay Castillo, Suzanne LaFollette-Black, and David Richardson for their leadership and dedication in progressing this work forward. We also sincerely thank the members of the Steering Committee for their guidance, insight, and ongoing support in shaping and advancing this plan.

- The **Affording Aging** goal focuses on ensuring that older adults have the financial security needed to age with dignity, while also providing the resources and supports that enable them to thrive with purpose, pride, and joy.
- The **Optimizing Health and Wellbeing** goal underscores the importance of healthcare and preventive measures across the continuum of care (COC), from frail to well.
- The **Supporting Older Adults and Their Families** goal is about strengthening the systems that many rely on as they age, especially home and community-based services (HCBS) and supports for family caregivers.
- The **Strengthening Communities for a Lifetime** goal is about creating age-friendly, inclusive communities where people can live, work, and thrive at every stage of life.



Affording Aging

Ageism and Engagement

- **Leads**: Tina Newsham and James Chappel
- **Executive Summary:** The Ageism and Engagement group is focused on reducing ageism and strengthening opportunities for people of every age to be involved in community life. Their purpose is to identify and challenge stereotypes and biases about aging and older adults, promote positive, accurate views of aging across generations, support policies and practices that encourage volunteering, employment, and civic participation at every stage of life, and build partnerships that make it easier for people to connect with meaningful activities and decision-making roles in their communities. The group's aim is to create a culture in North Carolina where people of all ages are respected, valued, and able to contribute through the following recommendations from the plan:
  - Strengthen and expand volunteer engagement opportunities for older adults to strengthen social connection and improve organizational capacity.
  - Expand appropriate employment opportunities for older workers which helps older adults remain active in the workforce, supports their financial stability, and enriches organizations with valuable perspectives.
  - Facilitate statewide collaboration among gerontology programs and related aging services sectors to prioritize and elevate careers in aging by integrating aging-focused content into professional curricula, such as medical, business, and public health programs, to ensure a well-rounded, interdisciplinary approach to addressing the needs of the growing aging population.
- **Implementation Structure**: To streamline efforts, the Ageism and Engagement group has divided its focus into three key areas: Volunteerism, Workforce, and Education, in alignment with the group's three main recommendations. Members chose which area they wanted to focus on, and taskforces were formed accordingly. Each taskforce is focused on specific initiatives:
  - **Volunteerism:** Strengthening opportunities for older adults to engage in meaningful volunteer roles.

- **Workforce:** Expanding employment opportunities and addressing age discrimination in the workplace.
- **Education:** Elevating aging-related content in professional curricula to build a well-rounded, interdisciplinary approach to aging.

As progress in the Workforce and Education taskforces accelerates, the Volunteer Engagement taskforce has temporarily paused its meetings. This group will reassess its efforts before the second year of the initiative.

- **Key Accomplishments:**
  - Successfully established three taskforces, Volunteerism, Workforce, and Education, each with defined objectives and leadership roles.
    - Launched the Workforce and Education taskforces, which have begun addressing key goals such as expanding employment opportunities for older adults and integrating aging-focused content into professional education programs.
  - Began discussions with universities, aging services providers, and Department of Public Instruction to integrate aging-related content into curricula for fields like healthcare, business, and public policy.
  - Initiated the planning for an "Ageism Awareness Day" event and contest, with goals to increase public awareness of ageism and its impact on older adults.
- **Next Steps and Upcoming Priorities for Next Quarter:**
  - Finalize the planning of Ageism Awareness Day, including event logistics and outreach efforts, to raise public awareness about the effects of ageism.
  - Continue to push for the expansion of age-inclusive hiring practices and support policies that encourage older adults to remain in the workforce.
  - Work with educational institutions to incorporate more aging-focused content into professional curricula across disciplines.
  - Reassess the Volunteer Engagement taskforce and its approach as part of the group's ongoing evaluation of priorities for Year 2.
- **Acknowledgements:** We would like to express our sincere gratitude to Tina Newsham and James Chappel for their leadership and dedication. We also extend our appreciation to the members of the Ageism Awareness Day Planning Committee: Tina Newsham, Elise Eifert, Suzanne LaFollette-Black, David Richardson, Misty Piekaar-McWilliams, Paula Hartman-Stein, Liza Cucco, Jennie Griggs, Ryan Lavalley, Logan Britt, Julia Burrowes, Cori Search, Cesiah Hernández, Adrienne Calhoun, and Jarm Del Boccio led by Divya Venkataganesan and Caylee Weaver. This committee's hard work and commitment have been instrumental in advancing the cause of age-inclusive community engagement.

<u>Financial Education and Planning</u>

- **Leads**: Jeff Hutchins, Shahriar Mostashari, and Sandy Gregory

- **Executive Summary**: The Financial Education and Planning group is focused on improving access to clear, age-appropriate financial information and tools for North Carolinians across the lifespan. The purpose is to identify financial challenges faced by different generational cohorts, from young adults beginning to save through older adults planning for retirement or managing fixed incomes, develop and share resources that promote saving, budgeting, debt management, retirement preparation, and protection from financial exploitation, strengthen partnerships among government, community organizations, and financial institutions to expand trustworthy education and planning supports, and encourage lifelong habits that build financial stability and security at every stage of life. The group aims to ensure people of all ages can make informed decisions about money, protect their assets, and plan confidently for the future through the following recommendations:
    - Increase economic wellbeing of older adults through financial education to empower older adults to manage their finances more effectively, achieve greater financial security, and reduce economic disparities.
    - Implement pre-retirement planning programs in the public and private sectors to provide valuable information about financial management and retirement benefits.
- **Implementation Structure**: The Financial Education and Planning subgroup is focused on gathering and curating age-specific financial education resources to create a comprehensive statewide toolkit. These resources will be categorized by generational cohort (e.g., Millennials, Gen X, Baby Boomers) and organized into tiers based on life stage. This effort will consolidate existing resources into a cohesive collection, facilitating access to the tools and programs that already serve North Carolinians.

  In addition, the subgroup is working to expand its membership by recruiting partners with expertise in financial education and planning. These partners will play a key role in supporting the promotion of multi-generational financial well-being across the state.
- **Key Accomplishments:**
    - Established the foundational framework for the statewide financial education toolkit, including the decision to organize resources by generational cohort and tiered life stages.
        - Defined the tiered system that will categorize resources based on different life stages, ensuring age-appropriate guidance for each group.
    - Began identifying and cataloging existing financial education resources across North Carolina that align with the proposed framework.
    - Started reaching out to potential partners with expertise in financial literacy, retirement planning, and community outreach to help expand the toolkit's reach.
- **Next Steps and Upcoming Priorities:**

        - Continue gathering and evaluating additional financial education tools, ensuring that all resources are relevant, accessible, and up-to-date.
        - Organize an initial inventory of financial education resources currently available to North Carolinians, organized by life stage.
        - Began building partnerships with financial institutions and community organizations to enhance the reach and impact of our initiatives.
        - Initiate the development of a statewide financial education toolkit, incorporating existing programs and identifying gaps in resources.
    - **Acknowledgements:** We would like to thank our dedicated partners, stakeholders, and financial experts who have contributed to the development of this initiative. Special thanks to those who have volunteered their time and expertise to ensure this effort reaches all North Carolinians, regardless of age or financial situation.



Optimizing Health and Well-being

Health and Well-Being

- **Leads**: Amber Chapman and Tish Singletary
- **Executive Summary:** The Health and Well-being subgroup focuses on strategies that support lifelong wellness and person-centered care for older adults under the All Ages, All Stages NC plan. The group advances two key recommendations:
  - Foster a culture of healthy living across the lifespan by promoting evidence-based health promotion programs such as A Matter of Balance, NC Senior Games, and other community-based resources.
  - Advance person-centered care models in healthcare delivery to improve accessibility, effectiveness, and the involvement of older adults in their care decisions.

  Members also prioritize integrating medical, behavioral, and social supports to reduce fragmentation in the current system. Related initiatives include the Healthy Aging Taskforce and Exercise is Medicine programs.
- **Implementation Structure:** The subgroup organizes its work through collaborative teams focusing on data and mapping, community resources, reimbursement models, and education campaigns. A framework is being developed to inventory health and wellness services across North Carolina. The subgroup has also identified the need for a statewide landscape analysis to assess resources, gaps, reimbursement structures, and programs that can be leveraged or expanded.
- **Key Accomplishments:**
  - Highlighted evidence-based programs, including A Matter of Balance and NC Senior Games, as models for expansion.
  - Promoted alignment of continuing education and licensure requirements with whole-person care principles.
  - Initiated planning for a statewide landscape analysis of programs, reimbursement systems, and data resources related to health and well-being.
  - Engaged with Healthy Aging Taskforce and Exercise is Medicine initiatives to coordinate and leverage ongoing efforts.
- **Next Steps and Upcoming Priorities:**

        - Collect data from members on existing programs, campaigns, and reimbursement models related to health and well-being.
        - Compile comprehensive information on:
            - Data and mapping resources (CHIS, BRFSS, Medicaid, GIS)
            - Community programs (AAAs, LHDs, AHECs, FQHCs)
            - Reimbursement models (Medicaid billing codes, claims)
            - Public education and awareness campaigns
        - Develop a template for inventorying local health and wellness services for older adults.
        - Continue collaboration on aligning professional education with whole-person care principles.
    - **Acknowledgment**: Thanks to Amber Chapman and Tish Singletary for their leadership, and to all subgroup members contributing to the landscape analysis and related planning efforts.

Long-Term Care Costs and Medicare

- **Leads**: Melinda Munden, Kevin Robertson, and Gina Upchurch
- **Executive Summary**: The Long-Term Care (LTC) Costs and Medicare subgroup focuses on financing and policy challenges associated with long-term care, Medicare, and Medicaid in North Carolina. The group aims to ensure older adults have access to affordable, high-quality care, and to inform policy solutions that align with national best practices. The subgroup emphasizes the importance of:
    - Understanding and comparing NC's long-term care costs with national benchmarks.
    - Integrating LTC financial education into statewide financial literacy efforts, including retirement planning.
    - Ensuring programs like SHIIP provide effective, unbiased guidance for consumers navigating Medicare and long-term care options.

  The subgroup is working to address gaps in service, workforce shortages, and financial planning challenges to support older adults in their communities.
- **Implementation Structure:** Work is structured around policy analysis, research, and cross-sector collaboration:
    - Collect data on LTC policies, Medicaid/Medicare savings programs, workforce costs, reimbursement models, and innovative community supports.
    - Examine national and other states' multisector plans to identify effective strategies for LTC financing and care delivery.
    - Maintain and expand a centralized repository of LTC-related resources, policies, and data to inform statewide planning.
    - Collaborate with UNC Sheps, financial planning experts, and other subgroups to ensure integration of LTC cost education into broader financial literacy initiatives.
- **Key Accomplishments:**

        - Began reviewing state and federal policy updates affecting Medicare, Medicaid, and LTC financing.
        - Reinforced SHIIP's essential role in helping consumers navigate Medicare and long-term care options amidst funding uncertainties.
        - Conducted preliminary analysis comparing North Carolina's LTC costs and workforce challenges with other states.
        - Identified opportunities to coordinate with the Financial Education and Planning subgroup to embed LTC and Medicare education into financial literacy resources.
    - **Next Steps and Upcoming Priorities:**
        - Conduct an environmental scan of LTC policies, block grants, Medicaid/Medicare savings programs, direct care workforce costs, and innovative community aging supports in North Carolina.
        - Review other states' multisector plans to determine inclusion of LTC costs and Medicare, and assess potential models for North Carolina.
        - Collaborate with the UNC Sheps team to explore data-driven solutions addressing care shortfalls for patients with serious illness;
        - Coordinate with the Financial Education and Planning Subgroup to embed LTC and Medicare cost education into financial literacy initiatives.
    - **Acknowledgements:** We thank Melinda Munden, Kevin Robertson, and Gina Upchurch for their leadership and dedication. Recognition is also extended to subgroup members and partners providing expertise in policy, finance, workforce, and service delivery to advance the care and financial security of older adults in North Carolina.

Workforce

- **Leads:** Trish Farnham
- **Executive Summary:** North Carolina's current workforce is not equipped to meet the growing demand for health care and support services needed by our aging population. Addressing workforce shortages is essential to building a more sustainable, skilled workforce that can provide culturally competent and high-quality care to older adults. The external Workforce subgroup lead by the Center for Workforce for Health, is focusing on developing targeted recruitment campaigns, partnerships with educational institutions, and enhance trainings to ensure a skilled workforce for aging-related jobs, addressing recommendations from the Investing in North Carolina's Caregiving Workforce report, and expanding financial incentives for health care careers.
- **Implementation Structure:** This group meets externally to All Ages, All Stages NC in order to not duplicate efforts.
- **Key Accomplishments:**
    - NC has just launched their State of the Workforce Survey-Aging and Disability, which will gain insights on direct care workers that are working with the older adult population.

- **Next Steps and Upcoming Priorities:**
- **Acknowledgements:** We thank Trish Farnham for her leadership and dedication. We would also like to extend our recognition to the external partner, the Center for Workforce for Health.



Strengthening Communities for a Lifetime

Housing

- **Leads**: Detra Purcell and Carissa Johnson
- **Executive Summary:** The Housing Subgroup focuses on addressing housing challenges for older adults and individuals with disabilities across North Carolina. Their work is guided by three key recommendations:
  - **Expand access to sustainable, affordable housing** to ensure older adults and individuals with disabilities can live independently and safely in their communities.
  - **Promote universal design** in housing developments to accommodate varying mobility levels and aging needs.
  - **Meet the evolving needs of individuals aging with developmental disabilities, traumatic brain injury, and mental health conditions.**

  The subgroup aligns its work with the NC DHHS Strategic Housing Plan and recent legislative efforts, including proposals for property tax relief to help low- and moderate-income older adults remain in their homes. Members have discussed foundational concepts such as universal design.
- **Implementation Structure:** The subgroup organizes its efforts through:
  - Reviewing housing needs, availability, and gaps across counties.
  - Tracking state and local housing policies affecting older adults and individuals with disabilities.
  - Collecting examples of universal design communities and innovative housing strategies to inform statewide implementation.
  - Using structured documentations to gather input, identify priorities, and track progress toward goals.
- **Key Accomplishments:**
  - Reviewed housing-related priorities in the All Ages, All Stages NC plan.
  - Discussed intersection with state housing programs, universal design principles, and legislative proposals for property tax relief.
  - Set the stage for upcoming presentations and site visits to deepen understanding of universal design.
  - Through presentations on universal design, subgroup members built a shared knowledge base.

        - Initiated the Housing Sticky Note Activity to compile relevant data, existing efforts, and potential points for action.
- **Next Steps and Upcoming Priorities:**
    - Gather examples of universal design communities and housing strategies to inform discussion and implementation and explore ways to further integrate universal design into state-supported housing programs, ensuring new developments are inclusive and adaptable to changing needs.
    - Continue mapping housing gaps and opportunities in alignment with the NC DHHS Strategic Housing Plan.
    - Work with the NC Housing Finance Agency on on the Quality Allocation Plan, which is a key tool used to guide the allocation of affordable housing resources. It establishes criteria and priorities for financing developments, including requirements for accessibility, energy efficiency, and community integration. By aligning with the QAP, the subgroup ensures that new housing opportunities meet high-quality standards and are inclusive of older adults and individuals with disabilities. Members have also discussed foundational concepts such as universal design to inform future planning.
- **Acknowledgements:** We thank Detra Purcell and Carissa Johnson for their leadership and commitment. Appreciation is extended to all subgroup members contributing to data collection, policy discussions, and innovative housing planning.

<u>Connectivity and Digital Equity</u>

- **Leads**: Louise Noble
- **Executive Summary:** The Connectivity and Digital Equity Subgroup focuses on advancing equitable access to digital resources, broadband connectivity, and digital literacy across North Carolina. Building on programs that emerged during the COVID-19 pandemic to address social isolation, the subgroup now addresses ongoing challenges, including digital sustainability, broadband access, and social connection for older adults. The group emphasizes using storytelling to communicate the importance of digital equity and to highlight successful programs such as Social Bridging NC and Ageless Access Digital Navigator.
- **Implementation Structure:** The subgroup organizes work through:
    - Identifying compelling stories, stakeholders, and channels to increase awareness of digital equity challenges and solutions.
    - Reviewing existing digital equity initiatives, including state and local programs, to identify gaps and avoid duplication.
    - Engaging with NC DIT and other partners to align efforts, share resources, and leverage existing initiatives for greater impact.
    - Ensuring programs are practical, low-cost, and maintainable over the long term with a focus on digital sustainability.
- **Key Accomplishments:**

        - Reviewed ongoing initiatives, including Social Bridging NC and NC DIT Resource Finder.
        - Highlighted the importance of acknowledging the origins of this work in COVID-19 response efforts while expanding to address broader broadband access and sustainability issues.
        - Initiated planning to leverage existing statewide programs without duplicating efforts.
    - **Next Steps and Upcoming Priorities:**
        - Collect input on storytelling ideas via a shared brainstorming document.
        - Connect with NC DIT to obtain analyses of existing digital equity programs
        - Continue exploring practical, low-cost actions and in-kind resources to improve access and digital literacy.
        - Develop strategies to increase public awareness of long-term digital equity challenges and opportunities.
        - Partner with WISEConnect for a pilot in NC. By piloting WISE Connect locally, the subgroup aims to identify best practices for expanding access to digital tools and strengthening social connections for older adults statewide. The initiative works with local governments, nonprofits, and community organizations to design and implement strategies that improve access to technology, enhance digital literacy, and strengthen social inclusion for older adults.
- **Acknowledgements:** We thank Louise Noble for her leadership and guidance. Appreciation is extended to subgroup members contributing their expertise in digital equity, program evaluation, and storytelling.

<u>Social Determinants of Health and Age-Friendly</u>

- **Leads**: Rebekah Dobbins and Barbara Akinwole
- **Executive Summary:** The Social Determinants of Health and Age-Friendly Subgroup advances priorities from All Ages, All Stages NC, focusing on factors that influence the health, independence, and social participation of older adults. The subgroup has four core recommendations, but will initially prioritize **transportation** and **nutrition** due to their interconnected impact on older adults' health outcomes and service access. The subgroup aims to map food assistance programs, identify transportation barriers, elevate best practices, and identify service gaps in both rural and urban communities. This work supports improved program integration, enhanced screening for food insecurity, and better alignment with local transit systems.
- **Implementation Structure:** The subgroup is organizing efforts through mapping county-level transportation and nutrition programs to identify gaps, best practices, and areas for improvement.
- **Key Accomplishments:**

        - Identified transportation and nutrition as initial priorities due to their interrelated effects on health and social participation.
        - Launched environmental scan initiative to document food assistance programs, transportation barriers, and innovative practices.
        - Established processes for monthly tracking, resource sharing, and collaboration among members.
    - **Next Steps and Upcoming Priorities:**
        - Continue researching county-level best practices and innovations related to transportation and nutrition to inform the statewide landscape analysis.
        - Maintain monthly meetings to review progress, discuss findings, and identify opportunities for integration across programs.
        - Use the shared SharePoint folder to compile resources, findings, and environmental scan results.
        - Identify strategies to enhance program access and reduce disparities in both rural and urban communities.
        - Explore additional social determinants of health, including housing stability, social isolation, and economic security, for future integration into subgroup priorities.
    - **Acknowledgements:** We thank Rebekah Dobbins and Barbara Akinwole for their leadership. Appreciation is extended to subgroup members contributing research, data analysis, and innovative solutions to strengthen community support for older adults.



Supporting Older Adults and Their Families

Home and Community Based-Services

- **Leads:** Misty Piekaar-McWilliams and Katie Kutcher
- **Executive Summary:** The Home and Community-Based Services subgroup is working to address critical gaps in service delivery, especially in rural areas where access is often limited, and ensures all North Carolinians receive the care they need close to home. Modernizing and adequately funding these services will reduce long waitlists, improve access, and close care gaps, creating a more equitable and efficient system. The groups initial priority recommendation is to align NC policies with the Older Americans Act rules to meet its intended goal of supporting more older North Carolinians to live at home and in the community.
- **Implementation Structure:** This group meets externally to All Ages, All Stages NC in order to not duplicate efforts. However, in Year Two of Implementation, this group will form an internal All Ages, All Stages, NC Subgroup.
- **Key Accomplishments:**
  - Older Americans Act Final Rule workgroups were created around the services most impacts and are meeting routinely.
  - Proposed draft manuals have been created based on updates made and those will be put out for a review and comment period.
- **Next Steps and Upcoming Priorities:**
  - NC's Corrective Action Plan to implement the OAA Final Rule is due on October 1, 2025.
  - This group intends to also focus on and purse data modernization, which includes the replacement of the current Aging Resource Management System.
- **Acknowledgements:** We thank Misty Piekaar-McWilliams and Katie Kutcher for their leadership and dedication. We would also like to extend our recognition to the external partners, the OAA Final Rule workgroups.

Caregiving

- **Leads:** Amanda Swanger

- **Executive Summary:** The Caregiving subgroup is advancing work to address the importance of building a more comprehensive range of services for caregivers and those whom they care for. The recommended action areas for year 1 are to provide family caregivers with more support including a comprehensive range of services like respite care, expand consumer-directed options, and sustain the NC Caregiver Portal so that caregivers can easily find reliable resources. This is crucial work as There are 1,280,000 family caregivers in NC who provide 1.2 billion hours of unpaid care annually. This equates to $16.5 billion of unpaid care.
- **Implementation Structure:** This group meets externally to All Ages, All Stages NC in order to not duplicate efforts.
- **Key Accomplishments:**
    - In the NC Caregiving Portal:
        - Currently up to 2732 caregivers and 86 staff in 98 of our 100 counties;
        - 63.9 new users per month
        - 65% of NC statewide new users come via invite, 35% are self-registered
            - Targeted outreach to counties that were the last to go on board
            - ROI - “memorize and regurgitate it”:
            - 751 power users (15 or more activities),
            - based on the 2024 study on impact of engagement which shows it can decrease hospital visits by 20% would equate to $978k
            - based on 2425 study on impact of engagement on delays in power care by 15 months- saved $6.6 M
    - The Lifespan Respite Grant:
        - Expanded Direct Services
        - Strengthened Training & Outreach
        - Built Volunteer Respite Network
- **Next Steps and Upcoming Priorities:**
- **Acknowledgements:** We thank Amanda Swanger for her leadership and dedication. We would also like to extend our recognition to the external partners, the NC caregiving networks.

<u>Referrals and Access to Care</u>

- **Leads:** Kasie Odham
- **Executive Summary:** Caregivers often encounter challenges in navigating multiple systems for information and support. The Referrals and Access to Care subgroup will also be supporting the No Wrong Door initiative through the NWD Governing Body and future grants to create a unified referral system with a "no wrong door" approach. A focus is to create a unified referral system with a “no wrong door” approach so caregivers receive tailored and accurate information, referrals, and access to long-term services and supports no matter which “door” they walk through. It will also work to enhance NC211 and NCCARE360 as comprehensive resources for older adults and people with disabilities to obtain

information and connect to needed services, such as housing, health care, food, transportation, and life-long learning resources.

- **Implementation Structure:** This group meets externally to All Ages, All Stages NC in order to not duplicate efforts.
- **Key Accomplishments:**
  - A new grant was received to continue the No Wrong Door Initiative. This will help to sustain the work and creates an opportunity to bring more partners into the governing body.
- **Next Steps and Upcoming Priorities:**
  - The No Wrong Doors Governing Body is currently working on drafting a letter to DHHS Secretary that is asking for prioritization of the No Wrong Door initiative.
- **Acknowledgements:** We thank Kasie Odham for her leadership and dedication. We would also like to extend our recognition to the external partner, the No Wrong Door Governing Body.