

REPORT OF THE VIRGINIA DEPARTMENT FOR THE AGING IN RESPONSE TO  
HOUSE BILL 2624 (2007)

# **Summary of State Agency Reports on Progress in Addressing the Impact of the Aging of Virginia's Population**

TO THE GOVERNOR AND  
THE GENERAL ASSEMBLY OF VIRGINIA



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# Summary of State Agency Reports on Progress in Addressing the Impact of the Aging of Virginia’s Population

## Report to the General Assembly In Response to HB 2624 (2007 Session)

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## EXECUTIVE SUMMARY

As the first baby boomers reach retirement age, Virginia, like much of the rest of the world, is poised to experience a dramatic and unprecedented aging of the population. It is projected that the number of Virginians age 60 and over will more than double between the year 2000 and 2030. In just over two decades, one in four Virginians will be age 60 or over and these “seniors” will comprise a higher proportion of the Commonwealth’s population than Florida has today. This “age wave” can be expected to impact life for both young and old and will necessarily affect how agencies of the Commonwealth serve the citizens of Virginia.

In recognition of this impending demographic shift, the 2004 General Assembly directed the Joint Legislative Audit and Review Commission (JLARC) to study the impact of Virginia’s aging population on the demand for and cost of state agency services. In response to the findings of that JLARC report, *The Impact of an Aging Population on State Agencies* (House Document 10), the 2006 Virginia General Assembly directed state agencies to report to the Governor and General Assembly on how the aging of the population impacts the agency’s ability to deliver services and a description of how the agency is responding (HB 110, 2006 Acts of Assembly Ch. 54). In addition, agencies were required to designate staff to review policies and programs and identify opportunities to make those policies and programs more accommodating to seniors and persons with disabilities (HB 854, 2006 Acts of Assembly Ch. 345). The 2007 General Assembly modified agency reporting requirements by directing agencies to submit their reports to the Virginia Department for the Aging (VDA) and required VDA to submit a summary of the reports to the Governor and the General Assembly by June 30<sup>th</sup> (HB 2624, 2007 Acts of Assembly Ch. 507).

This document presents a summary of the eighty-eight (88) reports received from state agencies in response to HB 2624 and provides recommendations for improving preparations by state agencies in the future.

The majority of the state agency reports submitted pursuant to HB 2624 reflected concern about the growth of Virginia’s older population and many reported providing specific and valuable services to today’s seniors. Few agencies, however, reported specific plans to expand or develop new services to meet the future need. The reports of a small number of agencies failed to include any recognition of the potential impacts of Virginia’s aging population.

Almost all of the 88 agencies did report being acutely aware of the aging of their own workforce and the probable loss of knowledge and experience that lies ahead as retirements increase. Some agencies reported developing strategies to minimize the effect of this loss while others appeared concerned but did not report any succession planning activities.

The challenge facing the Commonwealth is to ensure that all agencies are realistically planning for the future and will be prepared to continue to serve the Virginia of

tomorrow. Recommendations to assist agencies in preparing for the impact of an aging population include:

- Provide training for Cabinet Secretaries and/or Agency Heads on how the aging of Virginia's population may impact the Commonwealth's ability to provide services and how the next generation of older Virginians is likely to differ from today's seniors.
- Following this training, each Secretariat should conduct an internal self-assessment of their agencies' preparedness to serve a citizenry that is growing older. As subject matter experts, the agencies themselves are best-positioned to gauge if current plans will adequately meet future needs.
- Provide a forum for state agencies to share best practices for retaining older workers, engaging in succession planning activities and ensuring adequate knowledge transfer to younger workers.
- Modify current reporting procedures for agency reports due on November 15, 2008 to improve the quality of data and analysis provided for the Summary report in June 2009.

In addition, it is suggested that state agencies need to be mindful of certain emerging trends and "big picture" concepts related to the aging of the baby boom generation as new policies and services are developed. Finally, it is noted that more integrated and comprehensive planning efforts that cross agency boundaries will better position state government to maximize resources and continue providing a high level of service to all Virginians, now and in the future.

## Chapter One:

### INTRODUCTION

#### The Legislative History

Since 1990, sixteen (16) legislative studies have documented issues related to aging services in Virginia and the fragmentation of health care and social services for older Virginians. A sample of these include a study by the Secretary of Health and Human Resources in 1995 (*Aging in the 21<sup>st</sup> Century*, Senate Document 45), a study by the Secretary of Health and Human Resources in 1996 (*State-Level Consolidation of Aging and Long-Term Care Services and the Coordinated Delivery of Such Services at the State and Local Levels*, House Document 64), two studies by the Joint Commission on Health Care in 1998 (*Long-Term Care and Aging Study*, Senate Document 28 and the *Study of Long-Term Care*, House Document 50), and a study by the Joint Legislative Audit and Review Commission (JLARC) in 1999 (*Review of the Virginia Department for the Aging*, House Document 25).

Most recently, the 2004 General Assembly, in response to concerns raised by groups including the Commonwealth Council on Aging, the Virginia Association of Area Agencies on Aging, and AARP, passed House Joint Resolution 103 directing JLARC to study: "The impact of Virginia's aging population on the demand for and cost of state agency services, policies, and program management" and submit a report in 2006. In the report, *The Impact of an Aging Population on State Agencies* (House Document 10), JLARC determined that ".....the state is not well positioned to meet a potential increase in demand for services...." However, the report went on to say that the impact that the aging population will have on state agencies in future years is not always clear because the extent of the impact will ultimately be determined by state policymakers. ". . . because in most cases, increases in service provision are not inevitable, but instead rest upon policy choices about the role of the State in ensuring a minimum safety net, and what minimum quality of life for older Virginians is considered to be desirable, necessary, or affordable." JLARC further suggested that in addition to an increase in the older population, there are a number of factors that will also affect the future demand for services, including trends in health and disability rates, the availability of state funding, the ability of older Virginians to pay for services, and the availability of family and informal care providers.

The 2006 General Assembly enacted HB 110 and HB 854 in response to the JLARC report. HB 110 directed state agencies to: (i) include in agency strategic plans, under COV §2.2-5510, an analysis of how the aging of the population impacts the agency's ability to deliver services and a description of how the agency is responding, and (ii) report to the Governor and the General Assembly on the agency's progress in addressing the impact of the aging of the population. HB 854 required agencies to designate staff to review policies and programs and identify opportunities to make those

policies and programs more accommodating to seniors and persons with disabilities. Copies of HB 110 and HB 854 can be found in *Appendix A*.

House Bill 2624, from the 2007 General Assembly session, amended §2.2-5510 to modify the reporting requirements found in HB 110 cited above. Agencies were no longer directed to submit their reports directly to the Governor and the General Assembly. Rather, state agencies are now required to submit reports on their progress in addressing the impact of the aging population to the Virginia Department for the Aging (VDA) by November 15 of each year. The Office of the Secretary of Health and Human Resources provided guidance for preparing these reports to all state agencies through the *Leadership Communiqué*. Also, VDA provided guidance directly to those agency liaisons listed in response to HB 854. VDA was required to prepare a summary of these reports and submit this summary to the Governor and the General Assembly by June 30th. See *Appendix B* for a copy of HB 2624.

In 2008 the General Assembly extended the sunset clause for this legislation to 2013, thereby continuing this reporting requirement.

## **Reporting Requirements**

Reporting requirements for HB 2624 were developed by the Secretary of Health and Human Resources in collaboration with the Department for the Aging. The information requested of agencies in 2007 remained essentially the same as was requested in 2006, but with an additional data request developed with the Department of Human Resource Management related to the aging of the state workforce and agency succession planning (see item 5 below). The reports submitted to VDA were to include, at a minimum, the following information (See *Appendix C* for memo dated 9/14/07 from Secretary Marilyn Tavenner, sent to all state agencies):

1. To the extent such data is available, the number of persons who received services from the agency in the past fiscal year who fell into each of the following age ranges: 65-74; 75-84; and 85 and older. If the agency can provide data that compares such numbers to numbers of senior citizens served in the past, please do so. If the agency lacks specific information about the numbers of senior citizens it serves, but has other evidence indicating that it is serving more or fewer senior citizens than it has in the past, please describe the basis for that estimation.
2. Identify the agency services that are utilized by senior citizens 65 and older in significant numbers. Indicate whether the agency has the capacity at present to serve all interested seniors or whether the demand for certain services exceeds the agency's capacity. If so, does the agency maintain waiting lists for services?
3. Identify current agency programs, specifically designed to serve seniors 65 and older, that fall into any of the following six categories: Health Care/Wellness; Education; Public Safety; Recreation; Financial Security (including Housing); and Transportation.

4. Identify the extent to which your agency provides “consumer-oriented” publications and websites online that are designed to be “senior-friendly.” If the information you currently provide is not readily accessible to seniors, identify any steps your agency is taking to improve accessibility.
5. Describe the effect that the aging of the agency’s own workforce will have on its ability to deliver services. Consider the number of retirements expected in the next two years, the effect these retirements might have (e.g., loss of leadership or institutional knowledge in certain programs), how losses might be replaced (e.g., promotions or transfers, recruitment, use of wage staff, including retirees, re-engineering, outsourcing), and the costs or savings from the replacements (e.g., staff development cost, salary savings). This item might be addressed by summarizing relevant portions of the agency’s workforce plan.
6. Describe any other services or programs that the agency has implemented or plans to implement in the future to address the impact of the aging of Virginia’s population.

The six questions above were developed to provide baseline data on what activities or plans are being implemented or developed by state agencies to prepare for the aging of the Commonwealth’s population and the state workforce. These questions were deliberately open-ended, and were intended to collect initial information about services specifically designed for older Virginians, utilization and trend data to the extent available, efforts to make information and services “senior-friendly,” and workforce planning initiatives by all agencies.

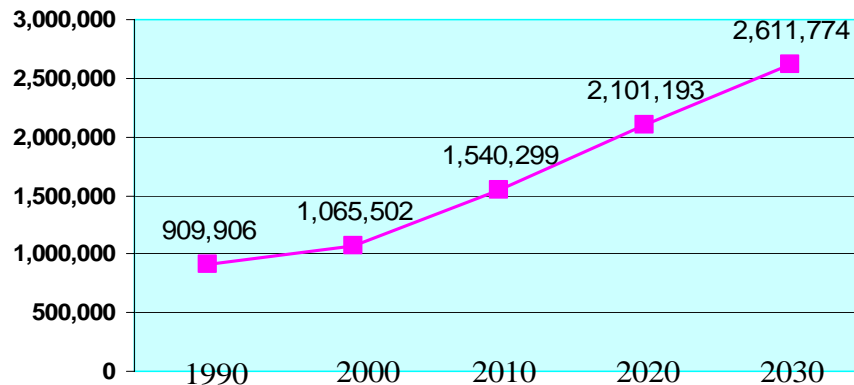
As is typically the case, there was neither universal nor consistent reporting by the agencies. Variations among reports make comparisons difficult with regard to certain issues and the creation of a statewide baseline problematic. Accordingly, the reports that were submitted in November of 2007 should be viewed as an informative “snapshot” of what many of the Commonwealth’s agencies are doing to serve today’s older population and how some agencies are preparing to address increasing demands, as well as the potential “brain drain” that may occur when long-serving employees retire.

## **The Challenge**

The United States, Japan and most of Europe are poised to experience a dramatic shift in their population as the Baby Boom generation (those persons born between 1946 and 1964) enters its senior years. This unprecedented aging of the population will also bring significant changes to life in the Old Dominion. It is projected that by the year 2030 Virginia will have 1.5 million more older Virginians than in 2000. This will be an increase of 145 percent. Today, older citizens comprise 15.1 percent of the Commonwealth’s population, but this will increase to 22 percent by 2020 and to 25 percent by 2030. This means that in just over two decades, one in every four Virginians will be age 60 or older. These changes will impact every facet of life for both young and

old, particularly in the areas of health care, human services, education, transportation, housing, and employment.

### Population Age 60 and Over in Virginia



In popular literature this expected “age wave” is sometimes referred to as the *silver tsunami* as it will likely impact everything in its path. Many --- but not all --- of these baby boomers will be healthier, better educated, and more financially secure than their parents and grandparents. On the other hand, there will be three times as many Virginians age 85 and older, the age group most likely to need some level of publicly-funded long-term care, whether that consists of community services to help them remain in their homes or some level of group care such as assisted living or nursing home care.

However, it is not just traditional senior services that will be impacted by this age wave. The wide variety of services provided by the Commonwealth -- from road construction to human services -- from drivers’ licenses to fishing licenses -- will be impacted by the aging of the citizenry. This next generation of senior citizens will not only be significantly larger, but will most likely have different attitudes about state services and programs than the current older citizens that Tom Brokaw calls “the Greatest Generation.” In order to continue to provide essential services to meet the needs of Virginians and to maintain the high quality of life enjoyed by most residents of the Commonwealth, state government, through the myriad of state agencies, needs to be preparing now to serve this new generation of aging citizens -- whether the changes are as simple as using larger print on state forms or more costly such as making highways more “aging friendly” to accommodate older drivers.



## The Report

This report represents a summary of the eighty-eight (88) reports submitted by agencies of the Commonwealth to the Virginia Department for the Aging in compliance with the Code of Virginia §2.2-5510. Examples of some agency activities to serve older citizens are presented in Chapter Two and agency efforts to minimize the impact of a graying workforce are presented in Chapter Three. Quick reference charts are available in *Appendix D* to give readers an overview of how all the agencies responded to questions about their preparations for serving an aging Commonwealth. The reference charts group agencies by cabinet secretariat and indicate whether the agency reported:

- The ability to track persons served by age;
- Utilization of services by persons aged 65 and older;
- Awareness of serving more older citizens today than in past years;
- Specific programs for persons age 65 and older and/or identified services used by seniors;
- Publications or websites targeted to older citizens;
- Improvement in the accessibility of these publications or websites to better serve older Virginians;
- The impact of the aging of their workforce;
- Projections of the number of employees who will retire in the near future; and
- Plans to address the impact on their agency's workforce.

The majority of the state agencies that submitted reports pursuant to HB 2624 are aware of the growth of Virginia's older population and more than 80% are taking steps to adjust or target services to meet their needs. This report will share some of the preparations that selected agencies are making, and plan to make, to address this demographic shift, including the impact on state agency employment patterns. It is hoped that this report will serve as a basis for discussion and increased planning by agencies individually and within each secretariat. The report will also present general recommendations about actions that can be taken now to enhance our preparation for this unprecedented change in who we serve.

## **Chapter Two:**

### **AGENCY SURVEY RESPONSES: IMPACT OF THE AGING OF THE POPULATION ON STATE AGENCY SERVICES**

The need to modify or expand existing services or pursue new programs to meet the needs of Virginia's changing population varies significantly, depending on the mission of the individual agency. Some agencies of the Commonwealth do not serve the public directly (i.e., Department of General Services), while others provide the same service to all citizens regardless of age (i.e., Museum of Fine Arts), and a few agencies exist solely to serve children or youth (i.e., Comprehensive Services Act). Most human service agencies serve a broad age spectrum but do have programs or services targeted to older Virginians. The only state agency with the sole mission of serving those over age 60 is the Virginia Department for the Aging.

The activities reported by state agencies in response to HB 2624 demonstrate this diversity of mission and a range of awareness and attention to the likely impact of the aging population. Many agencies, even some without direct public contact, clearly articulated how their services would be impacted and the steps they are taking to ensure that the needs of older Virginians will be met. Other agency reports appear to discount the impact of seniors by stating that the agency does not serve the public or that they do not serve seniors or serve all ages equally. In these cases, agencies may be missing the bigger picture and could be failing to consider all the potential ramifications of such a dramatic shift in the overall population. Some examples include: An agency with a mission to serve youth will likely see an increasing number of grandparents raising grandchildren and may wish to design services to meet their unique needs; many agencies could benefit from increased volunteerism and retiring baby boomers are likely to offer a rich source of educated, active seniors who wish to remain involved in their communities; and most agencies rely on a host of forms, manuals, and other documents that may need to be made more senior friendly in the near future.

It is hoped that by sharing examples of creative programs or services reported by selected agencies, all state agencies will develop a greater awareness of the challenges and opportunities that are before us. The following is only a sampling of reported activity by secretariat and does not include examples from all the agencies that reported. To review the complete reports submitted by the agencies, readers can access the Department for the Aging's web site at <http://www.vda.virginia.gov/HB2624.asp>.

#### **Secretary of Health and Human Resources**

The Secretary of Health and Human Resources oversees twelve state agencies that provide often-vital services to Virginians with mental retardation, mental illness,

substance abuse and physical disability concerns; to low-income working families; and to the aging community. In addition, agencies in this secretariat license health practitioners and directly provide public health services to the citizens of the Commonwealth.

*Example:* The Virginia Department for the Aging (VDA) is responsible for planning, coordinating, funding, and evaluating programs for older Virginians made possible through the Older Americans Act and the Virginia General Assembly. VDA oversees a network of 25 local Area Agencies on Aging (AAAs). AAAs provide a mix of services designed to allow older Virginians to remain independent in their own homes as long as possible. These services may include: home-delivered meals, meals at congregate sites, transportation, assistance with household chores, assistance with personal care activities (bathing, dressing, etc.), adult day care, activities at Senior Centers, health and wellness activities, employment and volunteer opportunities, and information and referral services for seniors and their caregivers. The department also provides counseling, assistance, and referrals for long term care services, consumer fraud and legal issues. In 2007, VDA received more than 11,000 calls requesting information about services and programs.

VDA also administers the following programs:

- *Project 2025* – in partnership with the Virginia Poverty Law Center, Inc., to expand legal assistance services for seniors.
- *Public Guardianship* program – to provide services through local community agencies to adults (18 and older) who are deemed by a court to need a guardian, are indigent, and who have no family or friends capable of providing this service.
- *Long-Term Care Ombudsman Program* – through a contract with the Virginia Association of Area Agencies on Aging to provide assistance to individuals or families with concerns about care provided in a nursing home, assisted living facility, or through a community-based service provider.
- *Senior Farmers Market Program* – in cooperation with the Virginia Department of Agriculture and Consumer Services and seven AAAs to provide coupons to eligible older Virginians to purchase locally grown fresh fruits, vegetables, and herbs from certified farmers at roadside markets and farmer's markets.
- *GrandDriver* – through funding provided by the Virginia Department of Motor Vehicles and the National Highway Safety Council to promote safe driving by seniors and with the *GrandTrans* website, to assist older Virginians in locating community transportation alternatives to driving.
- *Kinship Care Initiative* – to provide a statewide information and support network for older Virginian's who are raising their grandchildren or other relatives.
- *Virginia Insurance Counseling and Assistance Program (VICAP)* – to provide assistance to Medicare recipients who need help understanding their Medicare statements, choosing a long-term care insurance policy, or choosing a Medicare prescription drug plan.

*Example:* VDA is the lead agency in developing the *No Wrong Door* initiative for seniors and adults with disabilities. This innovative and collaborative approach will

ultimately create dramatic changes in how these populations, their families and caregivers access services across the Commonwealth. No Wrong Door is designed to coordinate state and local long term care planning efforts and to harness technology by creating a web portal to serve as a one stop resource for consumers and service providers. Currently, VDA is working with ten (10) regions of the Commonwealth representing sixty-seven (67) localities to develop the No Wrong Door initiative. Each region, led by the local AAA, is represented by an Advisory Council of public and private providers and citizens to improve the coordination of long term care services locally, identify gaps in services and needs of the community, and develop plans to address these needs. Technology is being used to assist older Virginians and adults with disabilities, their family members and caregivers to easily access information about available supports and services through *Virginia Easy Access*, a one stop web portal. Easy Access provides information about a myriad of topics that are of interest to seniors and adults with disabilities and is supported by SeniorNavigator's comprehensive database of over 21,000 service and provider listings. VDA is also partnering with 2-1-1 Virginia to have the 2-1-1 Call Centers respond to the needs of seniors and adults with disabilities by phone and through email via the *Virginia Easy Access* web portal. In addition, the No Wrong Door initiative is using technology to develop an automated information and referral system, individual needs assessment, and case management tools to improve service efficiency and to share consumer information easily among provider agencies, while protecting consumer confidentiality.

*Example:* The Department for the Blind and Vision Impaired (VDBVI) assists Virginia's citizens who are blind, deaf-blind, or vision impaired in achieving their maximum level of employment, education, and personal independence. VDBVI provides a broad array of services to visually eligible citizens over the age of 60. Services include: Diabetic management including the use of non-visual methods to obtain blood glucose readings and administer insulin injections; evaluation of and provision of adaptive equipment related to secondary disabilities; alternative methods to identify and administer medications; training on alternative methods of food preparation to insure proper nutrition; and adjustment to blindness counseling to reduce depression and improve self-esteem. Orientation and Mobility instruction is designed to provide consumers with the skills necessary to safely utilize public transportation and provide information on locally available transportation resources.

*Example:* The Department of Medical Assistance Services (DMAS) provides a system of high quality comprehensive health services to qualifying Virginians and their families. DMAS is the largest health care financing program for the elderly in the Commonwealth. To meet this growing demand for services from the Commonwealth's rapidly aging population, DMAS is engaged in a major reform of Virginia's Medicaid-funded long-term care. The reformed program, Integration of Acute and Long-Term Care Services, focuses on care coordination and integration of acute and long-term care services for low-income seniors and individuals with disabilities. DMAS is developing two models of this integrated care. The community model is called the Program for the All Inclusive Care of the Elderly (PACE). PACE is open to persons aged 55 and over who qualify for

nursing facility care. In the PACE model, all health care professionals and all services center around an Adult Day Health Care Center to provide comprehensive care for the participants. Virginia has one of the first rural PACE programs in the nation. The regional model is a capitated payment system for Medicaid and/or Medicare participants for all acute and long-term care services utilizing a managed care organization. DMAS will now include populations and services previously excluded from the existing managed care program.

Additional efforts underway by DMAS to provide improved services to seniors include:

- The Nursing Facility Quality Improvement Program (QIP). The QIP uses civil money penalty funds collected from facilities to improve the health, safety, and welfare of the residents.
- Virginia's *Money Follows the Person* (MFP) Demonstration Program through the federal Centers for Medicare and Medicaid Services. This project will enhance services and provide for recipients who wish to transition from facilities to the community. The program will create a system of long-term services and supports that utilizes available funds to "follow the person" into the community.
- Automation of the submission of pre-admission screening documents, including the Uniform Assessment Instrument or UAI, used to determine the functional level of persons applying for community services or admission to a nursing home through the Medicaid program. DMAS is developing, with its long-term care partners in the community, a web-based access for submission of these documents.
- DMAS also serves as the lead agency for Virginia's Systems Transformation Grant as part of the federal "Real Choice Systems Change" initiative. This grant will help develop a one-stop resource linking seniors and adults with disabilities to services. The grant will increase individuals' choice and control over their service delivery. Funding will also be directed toward information technology to support systems change which will improve access and delivery of services for seniors and adults with disabilities.

*Example:* The Department of Rehabilitative Services (DRS) provides and advocates for services that empower individuals with disabilities to maximize their employment, independence, and full inclusion into society. DRS provides a variety of services that are utilized by older Virginians including Case Management services to individuals with physical and sensory disabilities, Personal Care Services that provide non-medical services designed to assist an individual with a significant physical disability with completion of activities of daily living, and the services of the Woodrow Wilson Rehabilitation Center which provides a comprehensive array of services (vocational, medical) to individuals to help them to achieve employment or live more independently.

*Example:* The Virginia Department of Social Service (VDSS) provides assistance to citizens of Virginia to help them live their best lives by helping them triumph over poverty, abuse and neglect, achieve self-sufficiency, and shape strong futures for

themselves, their families, and their communities. VDSS has several programs serving Virginians age 60 and older. The Adult Services and Adult Protective Services programs serve adults ages 60 and older and adults ages 18 to 59 who are incapacitated. These programs include Adult Services, Adult Protective Services (APS), Auxiliary Grant, and Caregivers Grant. APS investigates reports of suspected abuse, neglect, or exploitation and provides service interventions to stop the abuse and prevent its recurrence. In FY 2007, 13,515 reports of adult abuse, neglect, and/or exploitation were received by local departments of social services. The Virginia Auxiliary Grant program is a monthly state supplement to Social Security disability benefits for poor aged or incapacitated adults residing in assisted living facilities or adult foster care homes. The Virginia Caregivers Grant Program was created by the General Assembly to recognize and reward those who care for an elderly or incapacitated relative at home through an annual grant of up to \$500. In calendar 2007, a total of 564 caregivers age 60 and older received a \$500 grant.

*Example:* The Virginia Department of Mental Health, Mental Retardation, and Substance Abuse Services (DMHRSAS) is Virginia's public mental health, intellectual disability, and substance abuse services system. This system is comprised of 40 community services boards and 16 state facilities serving children and adults who have or who are at risk of mental illness, serious emotional disturbance, intellectual disabilities, or substance use disorders. DMHRSAS and its community service delivery system provide geriatric care that includes a variety of clinical services and inpatient interventions that are specifically designed, implemented, and funded to address the unique and complex treatment and support needs of older adults (65 years of age and older) including specialized State Hospital Geriatric Care Services and State Training Center Geriatric Services. Older adults with mental illness seek and receive community mental health services in relatively large numbers as compared to those who seek and receive community mental retardation or community substance abuse services. Inpatient geriatric treatment services are provided by the five state hospitals which specialize in geriatric care: Piedmont, Catawba, Southwestern Virginia Mental Health Institute, Hancock Geriatric, and the Hiram Davis Medical Center.

*Example:* The Virginia Department of Health (VDH) promotes and protects the health of all Virginians. VDH reports that the aging of the population has significant implications for a wide range of VDH services, including chronic disease prevention, health promotion, injury prevention, immunization, the regulation of health care facilities, and emergency medical services. To improve the health of older Virginians, VDH is engaged in many activities. VDH monitors incidents of pressure ulcers in facilities and monitors the influenza immunization rate for adults 65 years of age and older. The Division for Injury and Violence Prevention manages a program to prevent domestic abuse including elder abuse. The Division also administers two programs stressing fall prevention and fire safety, including providing smoke alarms for older individuals who meet financial eligibility requirements. Finally, the VDH Division of Chronic Disease Prevention and Control oversees programs for diabetes, cardiovascular disease, arthritis, and the recognition of the signs of a stroke.

## Secretary of Administration

The Secretary of Administration oversees general government operations to ensure efficient and effective management of the people's resources. The eight state agencies under this secretariat manage the state's real estate portfolio, serve as the state building official, administer employee policies and benefits, oversee procurement, and provide laboratory services. Administration agencies also supervise elections, direct state funds to constitutional officers and public broadcasting entities, oversee charitable gaming, and safeguard human rights.

*Example:* The State Board of Elections (SBE) is the agency responsible for ensuring uniformity, fairness, and accuracy in all elections in the Commonwealth of Virginia. To meet the growing demand for services from the Commonwealth's rapidly aging population the SBE is assuring that all 134 polling places are accessible to persons with disabilities and to those older persons who may have mobility concerns as a result of aging. The SBE is also educating the elderly and voters with disabilities through their website and outreach programs about the accessibility of polling places, including curbside voting, special voting machines, and the availability of assistance. SBE also supports the absentee voting process established by state law that allows voters with a physical illness or a physical disability to apply annually and automatically receive mail-in ballots for all elections during the year. In addition, over the past few years, SBE has been piloting and exploring the use of "electronic poll books." This would benefit older poll workers as well as those older voters with mobility issues who wish to physically come into the polling place to vote because they perceive this process as more desirable than voting absentee or curbside.

## Secretary of Agriculture and Forestry

The Secretary of Agriculture and Forestry oversees the Department of Agriculture and Consumer Services, the Department of Forestry, the Virginia Agriculture Council, and the Virginia Marine Products Board.

*Example:* The Department of Agriculture and Consumer Services (VDACS) is responsible for administering over 60 laws and more than 70 regulations relating to consumer protection and the promotion of agriculture. VDACS has partnered with the Virginia Department for the Aging and local Area Agencies on Aging to implement the *Senior Farmers Market Nutrition Program*. The program targets low income senior citizens in eleven Virginia counties and seven cities. Seniors who meet the eligibility criteria are given coupons to purchase locally produced fresh fruits, vegetables, and herbs from 143 farmer vendors.

## **Secretary of Commerce and Trade**

The Secretary of Commerce and Trade oversees the economic, community, and workforce development of the Commonwealth through the work of fifteen (15) agencies.

*Example:* The Virginia Board of Accountancy (VBOA) regulates businesses and individuals who practice public accountancy and administers the CPA exam. The VBOA encourages older Virginians to learn more about protecting themselves from financial abuse through its Brochure for Senior Virginians. Senior Virginians can also learn more about protecting themselves, and about filing a complaint regarding frauds and scams by calling the VBOA Hotline for Senior Virginians or by visiting VBOA online. Considering an anticipated dramatic increase in the number of CPAs who will work beyond the age of 65 during the next two decades, VBOA is working with the Virginia Society of Certified Public Accountants to study what the impact on licensure may be. The agency is acting in a pro-active manner by proposing a plan to seek out and address the issues of keeping Virginia's aging CPA's up to date on all regulations, specifically the Continuing Professional Education units.

*Example:* The Department of Professional and Occupational Regulation (DPOR) protects the health, safety and welfare of the public by licensing qualified individuals and businesses and enforcing standards of professional conduct for professions and occupations as designated by statute. DPOR places special emphasis on the need to prevent fraud and discrimination against older Virginians. Senior citizens are often targets for unscrupulous business practices, particularly in five areas under DPOR's purview: construction and home repair, hearing aid specialists, cemeteries and pre-need burial contracts, opticians, and fair housing. DPOR hosts a dedicated hotline for seniors and their families. DPOR partners with law enforcement, other state agencies, and private-sector advocates such as AARP Virginia and SeniorNavigator to promote elder fraud prevention and consumer protection for older Virginians. In addition, DPOR staff offer presentations to senior citizen organizations throughout the Commonwealth. DPOR also administers and enforces the Virginia Fair Housing Law which prohibits housing discrimination on the basis of "elderliness," defined as age 55 and older.

## **Secretary of Education**

The Secretary of Education assists the Governor in the development and implementation of the state's education policy. This secretariat provides guidance to the sixteen public universities, the Virginia Community College System, five higher education and research centers, the Department of Education, and state-supported museums.

*Example:* The Department of Education (DOE) has responsibility for providing leadership and oversight for K through 12 education and also oversees adult education programs and services in Virginia. This includes programs that assist older adults in



obtaining their GED or in learning English as a second language. In addition, DOE manages federal and state funds allocated to a number of programs that may be of interest to older Virginians. These programs include Adult Basic Education (ABE), Adult Secondary Education (ASE), English for Speakers of Other Languages (ESOL), and General Educational Development Programs (GED). DOE also provides Honorary High School Diplomas to veterans of WWII and the Korean War.

*Example:* The State Council on Higher Education (SCHEV) is the Commonwealth's coordinating body for higher education. SCHEV reports addressing the impact of the aging of Virginia's population by directly serving today's senior citizens and by promoting Life-Long Learning opportunities. Life long learning programs promote learning over the course of the lifetime to boost careers and earnings, encourage cognitive and social benefits, and increase the enjoyment of life. At least eleven of Virginia's state colleges and universities report having some type of life-long learning program available on their campuses:

*Arlington Learning in Retirement Institute*  
George Mason University

*Lifelong Learning Institute*  
James Madison University

*Christopher Wren Association*  
The College of William and Mary

*Lifelong Learning Institute*  
Virginia Commonwealth University,  
Virginia Center on Aging

*Elder Study*  
University of Mary Washington

*Lifetime Learning Institute of Northern Virginia*  
Northern Virginia Community College

*Institute for Learning in Retirement*  
Old Dominion University

*Life Long Learning Opportunities Program*  
Virginia Tech

*Jefferson Institute for Lifelong Learning*  
University of Virginia

*Osher Lifelong Learning Institute*  
George Mason University

*Life Long Learning Society*  
Christopher Newport University

Several colleges and universities also participate in the *Elderhostel* program. Elderhostel offers non-credit courses to persons age 55 and older. In addition to these programs, section §23-38.56 of the Code of Virginia, known as the *Senior Citizens Higher Education Act*, allows eligible Virginians age 60 and older to audit (on a space available basis) courses at any state college or university without paying tuition. Older Virginians may also enroll in courses as full-time or part-time students for academic credit if they had a taxable income not exceeding \$15,000. SCHEV has also recently introduced programs that foster increased attraction and retention of "non-traditional" student populations (including persons age 60 and older) in postsecondary education. One of the programs that has been utilized by many persons aged 60 and older is the *fast track teacher certification* for retirees who wish to teach K-12 as a second career.

*Example:* The Virginia Center on Aging (VCOA) at Virginia Commonwealth University is an interdisciplinary study, research, information and resource facility utilizing the

resources of VCU for the benefit of older Virginians and the expansion of knowledge pertaining to the aged and to the aging process. The VCOA manages Virginia's Elderhostel program, the 16<sup>th</sup> largest in the country. VCOA also disseminates aging-related information and resources to older adults, their families and caregivers, through its quarterly publication *Age in Action* and other educational materials. VCOA also sends e-mail notices to older Virginians and others on available educational and training experiences being offered throughout Virginia.

*Example:* VCU's Department of Gerontology, sponsors academic programs that train gerontological specialists. It is also the home of two programs specifically serving elders in the Commonwealth: ElderFriends and ElderCare. ElderFriends is a special volunteer program that provides companionship, outreach, and advocacy through intergenerational relationships by matching students with older adults. The ElderCare program conducts monthly information and support sessions to assist VCU employees who are caring for frail elderly or disabled relatives or friends. In addition, interdisciplinary arrangements between the Gerontology Program and the School of Social Work allows graduate students in Social Work interested in working with elderly persons to earn a Certificate in Aging Studies while completing the Master of Social Work degree requirements.

*Example:* The VCU School of Medicine sponsors the Elder Care and Movement Disorders Program in the Department of Neurosurgery, providing a common area where participants can focus their efforts on the treatment of patients with diseases using new technologies for neuromodulation. The School of Medicine's Section on Geriatrics provides a continuum of interdisciplinary medical care including long-term care facilities, home care, and house calls, "transitional care" (intensive case management immediately post-hospital), ambulatory care, palliative care, and in-patient consultation at the VCU Medical Center. The Geriatric Pharmacotherapy Program in VCU's Department of Pharmacy makes significant contributions to improve the health of elderly people and achieve desirable therapy outcomes.

*Example:* Virginia Tech sponsors the Adult Day Services program which provides day respite care for vulnerable and frail older adults living in the community, usually with family members. Tech also sponsors the Center for Gerontology which serves as the organizational unit and focal point for multidisciplinary aging-related research on the Virginia Tech campus.

*Example:* George Mason University reports being in the process of negotiating an agreement for the construction of a University Based Retirement Center. This Continuous Care Retirement Center (CCRC) will provide, in the first phase, approximately 222 independent living apartments, 44 assisted living suites, 24 memory care units, and 30 private nursing beds. This will be a "learning laboratory" and will also house the university's Center for Senior Living and the life-long learning institute.

*Example:* To help older Virginians remain mentally and physically active, the Science Museum of Virginia (SMOV) and the Virginia Museum of Fine Arts (VMFA) provide a

variety of activities and options including discounted memberships for seniors. The SMOV currently has over 5,500 older citizens taking advantage of these discount memberships. VMFA estimates that one third of the total membership of the VMFA is comprised of Virginians aged 60 and older. Of special interest to seniors is the VMFA's wide array of educational opportunities that contribute to lifelong learning: special exhibitions from all over the world, lectures, special classes, workshops, studio art programs, gallery tours, travel programs, performing arts events, book clubs, and more. A concerted effort has been made to provide programs to residents of Virginia's growing number of retirement communities. There are also numerous volunteer opportunities that offer seniors the chance to contribute to the public services of VMFA as well as work with museum professionals. The Museum's Docent Program, for example, currently attracts a large number of senior citizens (about 65% of the docent volunteer force), who receive in-depth art history and art education training on a year-round basis.

### **Secretary of Finance**

The Secretary of Finance provides guidance to four agencies within the Finance Secretariat. These agencies handle all the financial transactions of the Commonwealth — from collecting taxes and paying bills to distributing aid to localities.

*Example:* The Department of the Treasury (DOT) serves as the central state agency providing statewide financial services for agencies and institutions of the Commonwealth. The single program for which DOT records the age of their customers is the Unclaimed Property program. DOT reports plans to increase their efforts to educate older citizens about the Unclaimed Property program by conducting training and outreach programs in assisted living facilities, nursing homes, and adult day care centers.

### **Secretary of Natural Resources**

The Secretary of Natural Resources advises the Governor on natural resources issues and works to advance the Governor's top environmental priorities. The Secretary oversees six agencies that protect and restore the Commonwealth's natural and historic resources.

*Example:* The Department of Conservation and Recreation (DCR) works to conserve, protect, and enhance the Commonwealth's lands, improve the quality of the Chesapeake Bay (and rivers and streams), promote the stewardship and enjoyment of Virginia's recreational resources, and ensure the safety of Virginia's dams. DCR offers special State Park rates for senior citizens aged 62 and older.

*Example:* The Department of Environmental Quality (DEQ) works with the Environmental Alliance for Senior Involvement (EASI) to train older Virginians to work with high school students to monitor water quality in streams and rivers. EASI is a

national nonprofit coalition of environmental, aging, and volunteer organizations whose mission is to increase opportunities for older adults to play an active, visible role in protecting and improving the environment in their communities.

### **Secretary of Public Safety**

The Secretary of Public Safety provides guidance to 14 state agencies. Agencies in this secretariat: enforce criminal, highway safety, and alcoholic beverage and tobacco laws; teach or train adults and youths; protect public safety through confinement, treatment and re-entry preparation of felons and through the supervision, treatment and monitoring of people on parole or probation; provide technical assistance, research and training for law enforcement agencies, community fire departments and prosecutors; plan and coordinate the state's emergency preparedness, response, recovery and mitigation efforts; train fire fighters; investigate crimes and test crime scene evidence; train Army and Air National Guard members; and, provide services to Virginia's veterans.

*Example:* The Department of Alcohol Beverage Control (ABC) works to control the distribution of alcoholic beverages in the Commonwealth and to provide educational and prevention programs around alcohol consumption. The agency collaborates with key state stakeholders and organizations concerned with alcohol abuse among Virginia's older adults through the formation of the Alcohol and Aging Awareness Group (AAAG). The AAAG cosponsored Virginia's first Alcohol and Aging Conference on 4/29/08 which attracted more than 300 participants from across the Commonwealth. ABC's Education section has revised and updated all training and prevention materials addressing the risks of older adults' use of alcohol. All training for licensees on selling and serving alcohol, including Responsible Selling and Serving Virginia Program (RSVP), Managers Alcohol Responsibility Training (MART) and speaker's bureau presentations will now address the issues of alcohol and the older adult population. ABC's Education section has also developed an alcohol and aging brochure entitled *The Best Is Yet to Come*. This brochure has now been distributed to over 9,000 citizens. Finally, ABC utilizes its quarterly employee newsletter, "Inside Spirits" to update its employees on the issues of alcohol and aging and will continue this series of articles.

*Example:* The Commonwealth's Attorneys' Services Council (CASC) is responsible for providing training, education and services for Virginia's 120 elected Commonwealth's Attorneys and their approximately 545 Assistants statewide. CASC has specific training sessions in their Annual Training Institute to educate prosecutors about how they can identify and prosecute elder abuse in the criminal courts.

*Example:* The Virginia Department of Corrections (DOC) supervises sentenced offenders in a humane, cost-efficient manner, consistent with sound correctional principles and constitutional standards. Inmates age 50 and older are typically regarded as "geriatric" because of their previous lifestyles and DOC reports providing services to a growing population of "senior" inmates. In FY1990, there were 715 "geriatric" inmates age 50 and older and they comprised 4.9% of the confined population. In FY2006 the

“geriatric” population increased to 4,132 or 11.4% of the confined population – representing a five-fold increase. By the end of 2009 the 50+ confined population is projected to reach 5,052 and comprise 12.9% of the “state responsible” population. While older prisoners are housed in several institutions throughout the Department, the Deerfield Correctional Center (DCC) in Southampton County mainly houses inmates with special health care needs as well as older inmates. DCC is designed to provide a secure but aging-friendly facility for the Commonwealth’s older prisoners. DCC just expanded their bed capacity from 497 to 1,080 in early 2007 and currently, 60% of Deerfield’s population is 50 and older. Because of the serious and violent nature of the crimes the older inmate has committed, many will be with the DOC until they are 75 years and older before they are eligible for release and placement in the community will be difficult. DOC reports anticipating that as a result, health care costs will increase and there will be a need for enhanced medical staff and equipment, special security and staff training. DOC recently conducted a *Master Plan for Health Care Services* to “... provide a planning report on alternatives for developing additional medical, mental health and geriatric facilities.”

Virginia has a conditional geriatric release clause that allows certain inmates who were not convicted of a Class 1 felony to apply for early release. Annually, there have been between 200 to 400 inmates eligible to apply but only 35 of the 400 eligible inmates applied in 2006 for geriatric release and only one was granted. The DOC also sponsors the Interagency Prisoner Re-Entry Policy Academy. Among the roles of the Academy are efforts to strengthen the Memorandums of Agreement with the Social Security Administration and the various pilot re-entry programs. This program also facilitate the Social Security and Medicaid application process for eligible inmates to receive benefits upon release. Finally, DOC also reports that 8.1% or 5,315 of Parole and Probation clients are over the age of 51.

*Example:* The Department of Criminal Justice Services (DCJS) provides comprehensive planning and technical and support services to the criminal justice system to improve and promote public safety in the Commonwealth. DCJS, in partnership with the Alzheimer’s Association and the criminal justice training academies, has developed basic Alzheimer’s Training for both entry-level and incumbent law enforcement officers. DCJS has also collaborated with the Attorney General’s Office for many years in their sponsorship of Triad. Triad is a program that brings the Sheriff, local police chiefs, and seniors together for crime prevention training and other programs that serve the special needs of the elderly, such as daily phone calls to check on the status of at-risk seniors, dissemination of information about current scams that are targeting the elderly, and other specific needs.

*Example:* The Virginia Department of Emergency Management (VDEM) protects the lives and property of Virginia’s citizens from emergencies and disasters by coordinating the state’s emergency preparedness, mitigation, response and recovery efforts. In response to the requirement that long-term care facilities develop emergency plans, VDEM has been receiving many requests from nursing homes and assisted living facilities for emergency planning assistance. As a result, VDEM is working with the

Virginia Emergency Management Association to develop a plan review matrix to assist local emergency managers to review facility plans. The matrix will also be distributed directly to long-term care facilities to encourage them in their planning efforts.

*Example:* The Virginia State Police (VSP) is the Commonwealth's statewide law enforcement and criminal investigation agency. VSP administers the Senior Alert Program. The program is similar to the Amber Alert Program for missing children. The VSP also provides Traffic Safety and Crime Prevention programs targeted to older citizens. They also have programs, brochures, and hand-outs formatted for the elderly to reinforce their safety message including a flexibility fitness training package that helps improve older driver performance. The Safe Driving for Older Adults Program assists seniors in conducting a physical self-assessment to determine if they need to adjust their driving habits. DriveWell, an extensive program developed by the National Highway Transportation Safety Administration and the American Society on Aging, promotes older driver safety and mobility in the community. Common Sense Crime Prevention for Senior Citizens suggests ways older citizens can avoid becoming victims of crime. Finally, Stepping Out – Mature Adults: Be Healthy, Walk Safely Program provides guidance on maintaining physical independence by walking and safety tips for successfully maintaining a healthy lifestyle.

*Example:* The Department of Veterans Services (DVS) ensures that Virginia's veterans receive the benefits, support, quality care, and recognition they have earned through service and sacrifice. To meet the growing demand for services, DVS commissioned two studies – one on future long-term care needs for veterans, the other on future memorial (cemetery) needs for veterans. The long-term care study identified a need for three additional veterans care centers. The construction of the Hampton Roads Veterans Care Center and up to three additional care centers will provide between 600 and 800 additional long-term care beds for veterans. The study also recommended that the Commonwealth begin to build a continuum of long-term care for veterans.

## **Secretary of Technology**

The Secretary of Technology and its agencies are responsible for the efficient and effective use of information technology to simplify government operations, advance technology applications to improve public services, and drive the innovation economy through the Commonwealth's leadership. The Secretary of Technology oversees two agencies: Virginia's Center for Innovative Technology (CIT) and the Virginia Information Technologies Agency (VITA).

*Example:* The Virginia Information Technology Agency (VITA) provides information technology that enables government to better serve the public. As the Commonwealth's population ages, there will be an impact on how that population is able to access Commonwealth services. VITA is charged with providing information technology leadership and support to state government entities so they can improve the efficiency and effectiveness of constituent services. VITA has developed policy standards in

response to a statutory requirement in the Commonwealth that the public have easy access to any government services or information as needed. VITA reports accomplishing this through promoting geospatial information services (GIS). GIS will provide Virginia's aging population with "map-based" information regarding services that are of interest/need to them; for example, the locations of/directions to social/recreation centers/facilities, places of worship, doctors offices, pharmacies, health care facilities, etc. VITA also provides technical and professional assistance to local 9-1-1 centers and telecommunication providers to insure all citizens have access to 9-1-1 services, particularly older citizens who live alone. In addition, VITA is assuring that all state agency websites are compliant with Section 508 of the Rehabilitation Act.

### **Secretary of Transportation**

The Secretariat of Transportation has the responsibility of developing and implementing Virginia's transportation program, including policy and financial oversight for six agencies and a variety of major transportation projects.

*Example:* The Department of Motor Vehicles (DMV) promotes Security, Safety, and Service through the administration of motor vehicle and related tax laws. DMV has a key role in serving Virginia's growing aging population as older citizens seek to maintain their driver's license later in life. DMV requires senior citizens to come in at age 80 to renew their driver's license in person which includes a vision test or presentation of a vision report from their eye care practitioner. DMV's Medical Review Program ensures the safety of Virginians on the road with a primary focus on drivers who have a physical or mental condition that impairs their ability to safely operate a motor vehicle. The goal is to allow individuals to drive for as long as they can safely operate a vehicle. DMV provides support to the Virginia Department for the Aging in the form of a grant for the GrandDriver initiative (see the Virginia Department for the Aging). DMV also provides consumer oriented publications for issues facing Virginia's senior citizens. These include the Medical Fitness for Safe Driving pamphlet and the Mature Drivers Page on the DMV and GrandDriver websites. These publications include information on the medical review process, safe driving tips, an online driving assessment for seniors, and information on resources available to seniors to maintain mobility.

*Example:* The Department of Rail and Public Transportation (DRPT) improves the mobility of people and goods while expanding transportation choices in the Commonwealth. The DRPT program that most affects senior citizens is the Federal Transit Administration's "The Elderly Persons and Persons with Disabilities Program (Section 5310)." In addition to administering Section 5310, DRPT has established the Interagency Transportation Coordinating Council to promote interagency cooperation (including transportation services for the elderly) at the state level. DRPT administers grant funds that provide funding assistance to public transportation providers that benefit the elderly and disabled. DRPT also provides financial and technical assistance to commuter assistance agencies across the Commonwealth. These agencies are involved in a number of activities and programs that help the elderly take advantage of

transportation options that are available in their communities such as the “Seniors-on-the-Go!” taxicab voucher program in Fairfax County that offers qualifying seniors \$30 worth of fares for \$10.

*Example:* The Virginia Department of Transportation (VDOT) plans, delivers, operates and maintains Virginia’s transportation network. VDOT’s Older Driver Initiatives program is directed toward helping motorists by utilizing enhanced visual aids – Signs, Signals, Roadway Lighting and Markings. Several improvements have been implemented that are helpful to all drivers, particularly older ones. For example, VDOT has begun using the new Clearview® font and brighter retroreflective sheeting on new and replacement guide signs. VDOT now uses pavement markings that enhance wet and night visibility in construction zones. Highly reflective marking material has been used for eight years on limited-access highways and certain other routes. Since 1970, VDOT has exceeded the national standards requirement for 8-inch wide traffic signal lenses by using 12- inch wide lenses. For these reasons and others, VDOT is considered a national leader in its use of older driver-friendly materials that promote safety. VDOT also continues to research and study ways to increase mobility and make driving roadways as safe as possible for older persons. VDOT’s Transportation Research Council helps support research conducted by the Virginia Tech Transportation Institute. The Institute is currently studying the biomechanical responses of older drivers during crashes to better understand older drivers who are at a much higher crash and fatality risk per mile driven compared with other drivers. It also examines how older adults drive, their impairment profiles, and what situations are the riskiest for this group.

### **Independent Agencies and Other Agencies**

Virginia’s independent agencies generally do not report through any of the three branches of state government. They are however, state agencies and receive their spending authority through the Appropriation Act. These independent agencies usually do not provide direct services to the older citizens of the Commonwealth. The agency highlighted below, however, provides an example of how these independent agencies can address the aging of the Commonwealth.

*Example:* The Virginia Housing Development Authority (VHDA) is a non-profit, quasi-governmental entity created by the Virginia General Assembly to help make quality housing more affordable to the state’s low and moderate-income residents. VHDA has created the REACH (*Resources Enabling Affordable Community Housing in Virginia*) Team to focus VHDA resources on assisting special populations including the elderly. A relatively recent and growing trend is to incorporate “Universal Design” features into newly built and renovated housing. VHDA has been promoting Universal Design through public education and the training of design professionals and others involved in housing development. VHDA also sponsors Mortgage Loan Programs for Senior Housing that have been specifically designed for and restricted to occupancy by low- and moderate-income seniors. Rental housing developments designed for occupancy



by low-income seniors are eligible to compete for 9% Low Income Housing Credits (LIHTCs). The overwhelming majority of LIHTC rental developments serve a significant number of senior households. Additionally, HUD's Section 8 program provides rental subsidies for "senior/disability" developments.

## **Summary**

The majority of the state agencies that submitted reports pursuant to HB 2624 are concerned about the growth of Virginia's older population, and as demonstrated in the examples above, many of them provide specific and valuable services to today's seniors. Few agencies, however, actually reported specific plans to expand or develop new services or reported conducting studies or analysis to determine future need. Of greater concern is the fact that a small minority of agencies do not appear to acknowledge that an older population will necessarily affect how Virginia government continues to serve the Commonwealth.

## Chapter Three:

### IMPACT OF AGING ON THE STATE WORKFORCE

With the impending retirement of the first wave of baby boomers by 2010, if not before, the challenge of maintaining the knowledge and skills gained from years of experience, as well as “institutional memory,” is taking on a new sense of urgency for state agencies. *Governing Magazine* (February 2006) reports that it is estimated that by 2010, 64 million workers...40% of the nation’s public and private workforce...will have reached retirement age. They report the public sector will be hit particularly hard as state governments are facing a serious imbalance in their work forces due to a variety of factors, but particularly revenue trends. Today’s baby boomer public employees were hired in record numbers during the 1960s and 1970s when economic growth encouraged state governments to expand their workforce. By the 1990s, and continuing through today, tight budgets have forced many state governments to engage in reduction-in-force strategies. Coupled with the trend towards privatization and early retirement options, many states have been unable to hire younger middle managers who can replace the aging baby boomers.

According to the Virginia Department of Human Resources Management (DHRM) [from the *2007 State Workforce Planning Report*], the average age of Virginia’s classified employees is 45.8 years old (as of 1/1/07), almost 10% of the state workforce is age 60 years or older, and there were 6,416 employees in 2006 (or 8.8% of the state’s employees) eligible for unreduced retirement. The Virginia Retirement System (VRS) reports that if the current retirement rate continues over the next 10 years, 38,400 state employees will be eligible to retire with an unreduced benefit. This number does not include employees of Virginia’s public colleges and universities that may be enrolled in other retirement plans.

The Commonwealth has human resources management programs in place to address employee turnover. These programs are decentralized and located within each agency so they are able to respond quickly and specifically when staffing concerns are identified. What challenges agency human resources staff, however, is the potential impact of the turnover of the baby boom employees and the loss of “tacit knowledge” or “the higher level understanding of the roles and responsibilities that enable agency staff to go beyond their routine assignments and procedural responsibilities to engage in the critical task of anticipating and solving problems.” (*Governing Magazine*, February 2006). This ability comes with experience and cannot be learned quickly or absorbed from training manuals.

The good news is that the majority (80 percent) of the state agencies reporting under HB 2624 have identified these issues and are taking some steps to address the loss of their older employees. Most of these agencies have also identified those employees who will be eligible for unreduced retirement benefits within the next several years. Beginning in 1998, most agencies have been developing and implementing agency

workforce plans and in 2003, the governor added workforce planning as a management objective for state agencies. Agency workforce plans identify jobs that are at-risk because of potential retirement or staff loss for other reasons.

Agencies reported a variety of comments about the potential loss of older staff and the need to retain, recruit, and train workers. Some examples follow:

The Department for the Blind and Vision Impaired stated that...

“Retirements will surely have an effect on most of our programs as the established leadership and institutional knowledge they [older employees] possess may be lost due to retirement.”

The Virginia Department of Social Services stated that...

“The loss of staff, leadership, and institutional knowledge could hobble the agency, especially if a large number of employee retirements occur at the same time.”

James Madison University stated that that the aging of their workforce...

“...will pose some interesting challenges and opportunities. ...we are fortunate that our geographic location [near Northern Virginia] provides us with a rich, diverse, and a highly trained candidate pool. Succession planning from within [however] may prove to be the most cost effective and will almost certainly help us retain our most talented staff as they will have room to grow within their careers.”

The Department of Mental Health, Mental Retardation and Substance Abuse Services stated that...

“The diversity of staffing skills mix, the complexity of consumer service requirements and facility site support issues have posed a number of human resources challenges. The exhaustive effort of recruitment and retaining staff without adequate compensation and career mobility lends itself to a ‘revolving door’ scenario....”

The Virginia Department of Education stated that...

“Critical shortages from expected retirements and turnover within the next two years demands a concerted effort to prepare and execute a detailed succession plan for all critical shortage areas. The expected drain of experience, knowledge and skills and an increased demand for services will further test the Department’s ability to keep an adequate and qualified workforce.”

The Virginia Employment Commission reported that...

“Based on the current budget situation, it is likely that many vacancies occurring within the next two years will not be filled. Although the agency has identified critical and difficult to fill positions, the implementation of additional succession planning strategies has been hampered by the uncertainty of how severely the financial constraints will affect the agency.”

These and other agencies identified a variety of strategies that they were using, or planned to use, to address the aging and potential retirement of members of their workforce. Strategies identified include:

- Recognition and work-life improvement programs to reward employees, increase morale, and encourage retention;
- Cross-training, coaching, and mentoring to assure that skills and knowledge are shared and passed along to younger workers;
- Flexible work hours, alternate work schedules, job-sharing, and telecommuting to encourage older workers to postpone retirement;
- Recruitment of recent retirees to return as part-time wage employees to train and mentor younger, less experienced staff;
- Identification of key positions and cataloging the competencies, skills, and abilities required to fill these positions;
- Identification of positions and tasks that can be redeployed, outsourced or privatized;
- Educational assistance to encourage employees to remain in state employment and to earn advanced academic degrees;
- Paid or unpaid internships to encourage young people to consider state employment;
- Employee assistance programs that support staff as they deal with their aging parents or other relatives;
- Reorganization of the agency to address the potential loss of staff;
- Training needs assessment; and
- Career ladders or paths that will attract younger employees and retain older employees.

Following are creative strategies that selected agencies reported developing to address the aging workforce:

The Department of Corrections reports that more than 25 percent of their total workforce will be eligible for retirement in the next 5 years. The Department has already begun succession planning activities. The LEAD (Leadership Enhancement & Development) Council has been formed and has put into place two significant programs. The first is a program to develop mid level managers to be ready to move into senior level manager positions when those positions become vacant due to retirement and other separations. The second program is “Smooth Start for New Supervisors.” It is a two day program for newly appointed supervisors to attend within 30 days of their appointment. The program is designed to open the window of supervision for new supervisors and expose

them to the basics of supervision, answer their questions, meet with the Director's Staff, and provide an orientation to the Department's Strategic Plan.

Virginia Tech reports that with retirements projected at an annual rate of 12 percent over the next six years, "the recruitment of new employees and the development of current employees will be critical." Tech's goal is to develop a succession management program that develops challenging, state-of-the art, staff development programs and resources designed to foster a culture that nurtures the next generation of leadership, creates a common leadership culture, enhances diversity, and sustains a positive momentum to a successful future.

The Department for the Deaf and Hard of Hearing will recruit future staff with the skills and training needed by developing internship opportunities with targeted universities (such as Gallaudet in Washington, DC) and with appropriate professional and advocacy organizations that can point individuals with expertise about deaf issues to the Department.

The Department of Labor and Industry reports placing great value on the contributions of older workers. The Department partners with AARP to utilize senior citizens to perform administrative and clerical functions within the department's headquarters. This win-win agreement provides hands-on work experience for the seniors enrolled in the AARP job placement program and provides a cadre of experienced employees to supplement the staffing needs of the department.

The State Board of Elections acknowledges the increasing importance of technology that requires training older staff to keep up with advances in electronic document processing and record keeping. The Board is using technology to change from manual business processes to automated applications and is developing artificial intelligence to manage workflows and improve project management by using more of staff's intellectual skills as opposed to physical and motor skills. This will also allow employees to work well into old age.

The Department of Forestry reports that the arduous (and often dangerous) nature of forestry jobs results in a high rate of disability and early retirement for individuals serving in these positions. The traditional retirement plan for state employees is not able to provide a suitable retirement program for this highly specialized work force. Therefore, the agency is actively pursuing an enhanced retirement option for its employees in these positions.

## **Summary**

Almost all of the 88 agencies reporting in response to HB 2624 are acutely aware of the aging of their own workforce and the probable loss of knowledge and experience that lies ahead as retirements increase. Some agencies are actively developing strategies to minimize the effect of this loss while others are concerned but did not report any

succession planning activities. Providing information, guidance and sharing of best-practices would likely be welcomed by many agencies as they prepare for the future.

## Chapter Four

### CONCLUSIONS AND RECOMMENDATIONS

The eighty-eight (88) reports submitted by state agencies on their progress in preparing for the impact of an aging population present a mixed picture of preparedness for the Commonwealth. While some agencies are taking innovative and targeted steps to address the future needs of an older population, other agencies are aware of the looming demographic shift but report limited or no activity specifically designed to prepare for this change. Finally, there are a minority of agencies that seem almost unaware of the broad implications of the impending age wave. In some cases, agencies with very similar missions (i.e., universities or museums) reportedly view the impact on their services quite differently -- from significant to minimal. One of the challenges facing the Commonwealth is to ensure that all agencies are realistically planning for the future and will continue to serve the Virginia of tomorrow.

In response to the specific questions presented to the agencies, it is encouraging to note that of the 88 agencies reporting:

- 19 agencies (22 percent) report serving more older citizens now than in the past;
- 71 agencies (81 percent) report having some programs targeted to older citizens or programs and services that may be utilized by older citizens;
- 67 agencies (76 percent) report having publications, web pages, or other informational materials specifically targeted to older citizens or that meet ADA guidelines and may be used by older citizens; and
- 70 agencies (80 percent) have, or are developing, plans for addressing the aging of their own workforce.

However, it is apparent that more needs to be done to move the Commonwealth forward in addressing the impact of the aging population on state government. The following recommendations are offered to assist agencies in meeting this challenge:

- Training for Cabinet Secretaries and/or Agency Heads – The aging of Virginia's population and the likely impact on the Commonwealth's ability to provide services should be the subject of discussion and/or training for state officials. In addition to demographic projections, information on how the baby boomer generation will likely differ from their parents and grandparents should be provided. This could include how the next generation of senior citizens is likely to view government services, how they may request or demand services, prefer to communicate with state agencies, and the types of services that are likely to be in high demand. This training could be facilitated by the Virginia Department for the Aging and include presentations by area experts on serving seniors today and tomorrow. If needed, VDA could also help design and deliver a curriculum on serving older Virginians for individual agencies. Such training could be provided at conferences, agency staff meetings or other appropriate venues.

- Internal Assessment of Agency Preparedness – Following training, each Secretariat should conduct an internal self-assessment of their agencies' preparedness to serve a citizenry that is growing older. Their assessment should include projections of the future demand for their services by an older population, specific strategies they will take to meet this demand, and proposals for changes to their strategic plans. As subject matter experts, the agencies themselves are best-positioned to gauge if current plans will adequately meet future needs. These self-assessments should be incorporated into future summary reports on how state agencies are preparing to address the impact of the aging Virginia population.
- Forum to Share Workforce Best Practices – The Governor may want to consider creating a state-level forum for agencies to come together to discuss the impact of the graying workforce on agency operations. Creative strategies could be shared for retaining experienced workers beyond traditional retirement age, ensuring that adequate "knowledge transfer" to younger workers occurs, and ways to support state employees who are caring for elderly relatives. Both the Department of Human Resources Management and/or the Governor's Office on Workforce Development might facilitate such a forum and any ongoing efforts to assist agencies.
- Revised Reporting Requirements for State Agencies – State agencies should continue to report on the impact of an aging population. The 2008 General Assembly extended the sunset provision of this mandate to 2013. VDA will work closely with the Secretary of Health and Human Resources to develop revised reporting instructions and format for agencies to use in submitting a follow-up report on November 15, 2008.

In addition to these specific recommendations, many policies and programs of the future should be viewed within the larger framework of an older Virginia. The following "big picture" issues are examples of concepts that should become integrated into planning by policymakers at all levels:

- The very definition of "old" is changing. Because of improved health status, increased longevity and the diversity of lifestyles enjoyed by baby boomers, chronological age may cease to be the main criterion for eligibility for some public services. Functional ability may be considered as a more relevant criterion. Policymakers will need to account for the diversity of needs and expectations among future cohorts of older Virginians in order to target services and use state resources wisely.
- Traditional notions of retirement are becoming outmoded. The combination of early departure from the labor force and an increased life span means that some people are spending many more years in retirement. Other baby boomers will start second careers or continue working well into their 70s and 80s because of personal choice or economic need. It is expected that even retired baby



boomers are likely to want to remain relevant and engaged and will offer a talented and valuable resource to their communities.

- Surveys continually report that most people prefer to retire and stay in the community in which they have lived, remaining close to friends and family. This concept of “aging in place” means that older persons should be able to remain independent as long as possible, have access to appropriate housing and options for moving about the community beyond personal vehicles, have access to educational, cultural, and recreational facilities, feel safe, enjoy opportunities for social and civic engagement, and live in an intergenerational environment. The term often used to describe these neighborhoods is “lifecycle” or “livable” communities.” They are communities that are *good for the aged and good for all ages*.

Finally, the need for integrated planning by all agencies is growing. For example, the transportation needs of older Virginians is related to land-use planning, zoning policies, housing policies, and a number of other issues for which state and local governments take responsibility. An example of the kind of inter-related approach to issues that should be employed to prepare for the aging of Virginia can be found in Governor Kaine’s Executive Order 69, which promotes smart, sustainable growth to reduce suburban sprawl. With thoughtful and coordinated preparation, state agencies can play a key role in ensuring that Virginia is not only a great place to grow up – but a great place to grow old.

## APPENDIX A

### CHAPTER 54

*An Act to amend and reenact § 2.2-5510 of the Code of Virginia, relating to the effect of the aging population on state agencies.*

[H 110]

Approved March 7, 2006

Be it enacted by the General Assembly of Virginia:

1. That § 2.2-5510 of the Code of Virginia is amended and reenacted as follows:

§ 2.2-5510. (Expires July 1, 2008) Strategic plan.

A. Each agency shall develop and maintain a strategic plan for its operations. The plan shall include:

1. A statement of the mission, goals, strategies, and performance measures of the agency that are linked into the performance management system directed by long-term objectives;

2. Identification of priority and other service populations under current law and how those populations are expected to change within the time period of the plan; ~~and~~

3. An analysis of any likely or expected changes in the services provided by the agency; *and*

*4. An analysis of the impact that the aging of the population will have on its ability to deliver services and a description of how the agency is responding to these changes. Based on guidance from the Secretary of Health and Human Resources, each agency shall report by October 1 of each year to the Governor and to the General Assembly its progress for addressing the impact of the aging of the population in at least five specific actions.*

B. Strategic plans shall also include the following information:

1. Input, output, and outcome measures for the agency;

2. A description of the use of current agency resources in meeting current needs and expected future needs, and additional resources that may be necessary to meet future needs; and

3. A description of the activities of the agency that have received either a lesser priority or have been eliminated from the agency's mission or work plan over the previous year because of changing needs, conditions, focus, or mission.

C. The strategic plan shall cover a period of at least two years forward from the fiscal year in which it is submitted and shall be reviewed by the agency annually.

D. Each agency shall post its strategic plan on the Internet.

#### **CHAPTER 345**

*An Act to amend the Code of Virginia by adding a section numbered 2.2-604.1, relating to designation by agency heads; interests of senior citizens and adults with disabilities.*

**[H 854]**

Approved March 30, 2006

Be it enacted by the General Assembly of Virginia:

1. That the Code of Virginia is amended by adding a section numbered 2.2-604.1 as follows:

*§ 2.2-604.1. Designation of officials; interests of senior citizens and adults with disabilities.*

*The head of each state agency shall designate an existing employee who shall be responsible for reviewing policy and program decisions under consideration by the agency in light of the effect of such decisions on senior citizens and adults with disabilities. The designated employee shall advise and alert the agency head of opportunities to make policies, programs, and regulations senior-friendly and disability-friendly.*

## APPENDIX B

### CHAPTER 507

*An Act to amend and reenact § 2.2-5510 of the Code of Virginia, relating to the Government Performance and Results Act; effect of the aging population on state agencies.*

**[H 2624]**

Approved March 19, 2007

Be it enacted by the General Assembly of Virginia:

1. That § **2.2-5510** of the Code of Virginia is amended and reenacted as follows:

§ **2.2-5510**. (Expires July 1, 2008) Strategic plan.

A. Each agency shall develop and maintain a strategic plan for its operations. The plan shall include:

1. A statement of the mission, goals, strategies, and performance measures of the agency that are linked into the performance management system directed by long-term objectives;
2. Identification of priority and other service populations under current law and how those populations are expected to change within the time period of the plan;
3. An analysis of any likely or expected changes in the services provided by the agency; and
4. An analysis of the impact that the aging of the population will have on its ability to deliver services and a description of how the agency is responding to these changes. Each agency shall report by November 15 of each year to the Department for the Aging its progress in addressing the impact of the aging of the population, according to guidance established by the Secretary of Health and Human Resources. Based upon information received, the Department for the Aging shall prepare a report summarizing the progress made by the agencies and submit such report to the Governor and the General Assembly by June 30 of the following year.

B. Strategic plans shall also include the following information:

1. Input, output, and outcome measures for the agency;
2. A description of the use of current agency resources in meeting current needs and expected future needs, and additional resources that may be necessary to meet future needs; and
3. A description of the activities of the agency that have received either a lesser priority or have been eliminated from the agency's mission or work plan over the previous year because of changing needs, conditions, focus, or mission.

C. The strategic plan shall cover a period of at least two years forward from the fiscal year in which it is submitted and shall be reviewed by the agency annually.

D. Each agency shall post its strategic plan on the Internet.

## APPENDIX C



### COMMONWEALTH OF VIRGINIA OFFICE OF THE SECRETARY OF HEALTH AND HUMAN RESOURCES

#### MEMORANDUM

**TO:** All State Agency Heads

**FROM:** Marilyn B. Tavenner  
Secretary of Health and Human Resources

**DATE:** September 14, 2007

**RE:** State Agency Reporting Requirements Pursuant to HB 2624 (2007)  
*Addressing the Impact of the Aging of Virginia's Population*

Agency heads will recall that the 2006 Session of the General Assembly enacted **HB 110** and **HB 854**, in part, as a response to House Document 10 (2006): *Impact of an Aging Population on State Agencies*. This document, prepared by JLARC, found that most state agencies were not prepared to deal with the impact of the "baby boomer" population. The bills enacted last year required agencies to (i) designate staff to review agency policies and programs and identify opportunities to make those policies and programs more accommodating to seniors and persons with disabilities; (ii) include in agency strategic plans, under COV § 2.2.-5510, an analysis of how the aging of the population impacts the agency and how the agency is responding, and (iii) report to the Governor and the General Assembly on the agency's progress in addressing the impact of the aging of the population. As required, I issued guidance last year for the initial reports that were to be submitted to the Office of the Governor and the Division of Legislative Automated Services by October 1, 2006.

In the 2007 Session, the General Assembly enacted **HB 2624**, amending §2.2-5510 to modify the reporting requirements. Agencies are no longer directed to submit their reports to the Governor and the General Assembly. Rather, state agencies are to report their progress in addressing the impact of the aging of the population to the

**Department for the Aging by November 15** of each year. Again, guidance for the reporting falls to the Secretary of Health and Human Resources. Under the 2007 amendments, the Department for the Aging will prepare a summary of these reports and submit that to the Governor and the General Assembly.

### **Revised Reporting Requirements**

The information requested of the agencies remains essentially the same as was requested last year, but with the addition of one data request, developed in conjunction with the Department of Human Resource Management and related to the aging of the state workforce and agency succession planning (see item 5 below). Accordingly, in addition to amending its strategic plan as may be necessary, each agency shall submit **by November 15 of each year to the Virginia Department for the Aging**, a report that includes, at a minimum, the following information:

7. To the extent such data is available, the number of persons who received services from the agency in the past fiscal year who fell into each of the following age ranges: 65-74; 75-84; and 85 and older. If the agency can provide data that compares such numbers to numbers of senior citizens served in the past, please do so. If the agency lacks specific information about the numbers of senior citizens it serves, but has other evidence indicating that it is serving more or fewer senior citizens than it has in the past, please describe the basis for that estimation.
8. Identify the agency services that are utilized by senior citizens 65 and older in significant numbers. Indicate whether the agency has the capacity at present to serve all interested seniors or whether the demand for certain services exceeds the agency's capacity. If so, does the agency maintain waiting lists for services?
9. Identify current agency programs, specifically designed to serve seniors 65 and older, that fall into any of the following six categories: Health Care/Wellness; Education; Public Safety; Recreation; Financial Security (including Housing); and Transportation.
10. Identify the extent to which your agency provides "consumer-oriented" publications and websites online that are designed to be "senior-friendly." If the information you currently provide is not readily accessible to seniors, identify any steps your agency is taking to improve accessibility.
11. Describe the effect that the aging of the agency's own workforce will have on its ability to deliver services. Consider the number of retirements expected in the next two years, the effect these retirements might have (e.g., loss of leadership or institutional knowledge in certain programs), how losses might be replaced (e.g., promotions or transfers, recruitment, use of wage staff, including retirees, re-engineering, outsourcing), and the costs or savings from the replacements (e.g., staff development cost, salary savings). This item might be addressed by summarizing relevant portions of the agency's workforce plan.

12. Describe any other services or programs that the agency has implemented or plans to implement in the future to address the impact of the aging of Virginia's population.

### **Reporting Format**

The Department for the Aging requests that agency reports be prepared as Microsoft Word documents. The documents should be single spaced (with paragraphs separated by a double space), on 8 ½" x 11" paper with 1" margins on all sides and a font size of not less than (twelve) 12. Each page in the report should include a header with the agency's name and the date of the report. All pages should be numbered. Each agency's report should include the following:

1. **Cover Page** – The cover page should contain the following wording: *Report on the Response of the (agency name) to the Impact of the Aging of Virginia's Population*. The report should also include the date of submission.
2. **Signature Page** – The Signature Page should include the following statement: *Pursuant to legislation enacted by the Virginia General Assembly of Virginia, the (agency name) submits this report of its progress in addressing the impact of the aging of Virginia's population*. This page should be signed by the agency head and include the submission date. Digital signatures should be used, if possible.
3. **Executive Summary** – The Executive Summary should not exceed two (2) pages. The summary should include a short statement of the major issues and any recommendations or strategies from the body of the report.
4. **Agency Description** – This section should provide a brief overview of the agency's mission, roles, and responsibilities.
5. **Data Requested** – This section should address the six (6) issues listed under Revised Reporting Requirements above.

### **Report Submission**

Reports should be submitted **by e-mail**, by **Thursday, November 15, 2007**, to Bill Peterson at the Virginia Department for the Aging at the following e-mail address: [bill.peterson@vda.virginia.gov](mailto:bill.peterson@vda.virginia.gov). Please direct any questions to:

Bill Peterson, MSW, PhD  
Senior Policy Analyst  
Virginia Department for the Aging  
1610 Forest Avenue, Suite 100  
Richmond, VA 23229  
(804) 662-9325  
[bill.peterson@vda.virginia.gov](mailto:bill.peterson@vda.virginia.gov)



## APPENDIX D