

# The Whys and How-Tos of Creating an Age-Friendly Community



Margaret B. Neal, Ph.D.



# Overview

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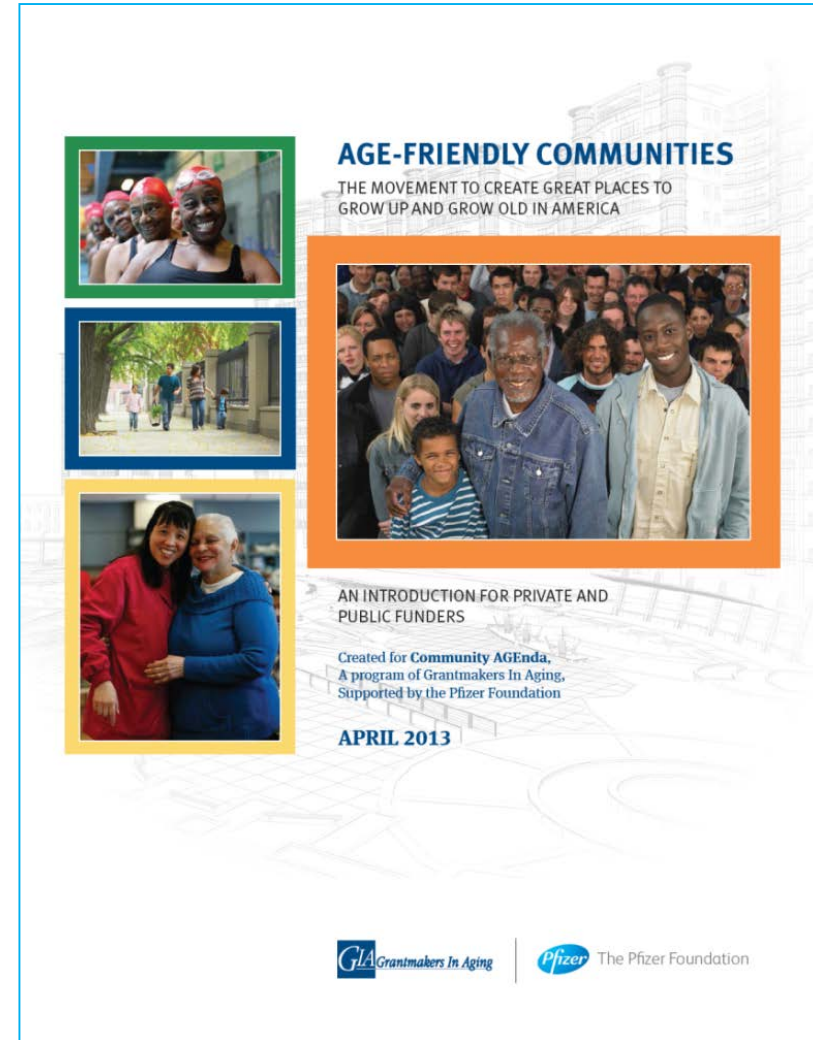
- The age-friendly communities movement: background
- The opportunity, or “whys”: the case for age-friendly communities
- Some “how-tos”: strategies for enhancing age friendliness
  - Using the case
  - Challenges and lessons learned



# Background:

## Lifelong/Livable/Age-friendly Communities

- The lifelong/livable/community for a lifetime/age-friendly communities movement is growing nationally and internationally
- Many different models dating to the 1990s and before
- Common focus: holistic approach (physical, social, and service environments); community as well as individual responsibility for aging



# What is “Age-Friendly”?

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World Health Organization definition: A community that is striving to:

- be **inclusive** and **accessible**
- promote **active ageing**
- emphasize **enablement** rather than disablement
- The focus is on the **life course** and **intergenerational interdependence**

“An age-friendly city...is friendly for all ages and not just ‘elder-friendly’.”



Credit: Bridge Meadows

# Origin: WHO's Active Aging Framework

WHO (2002) posited that active aging:

- Involves optimizing opportunities for health, participation, & security
- Is determined by various individual, social & infrastructure factors

These determinants account for differences in life expectancy, health status & well-being

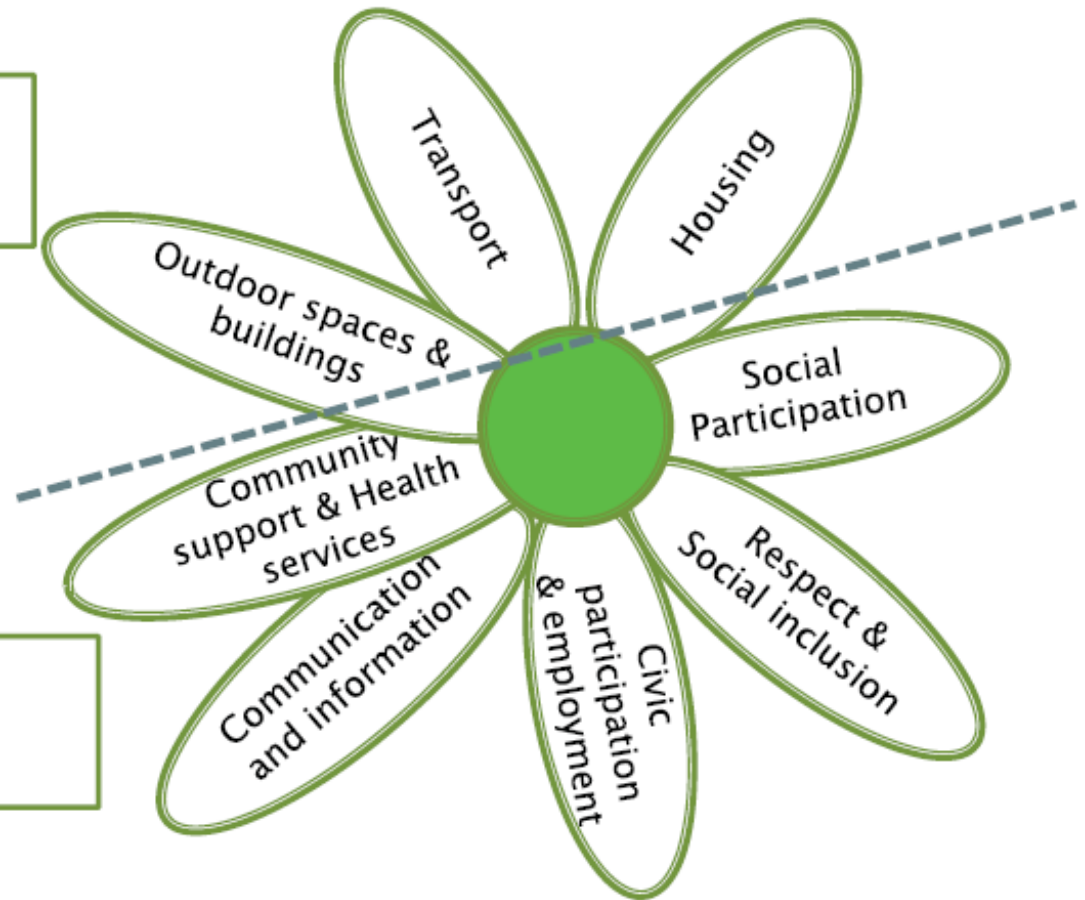




# Domains of Age Friendliness

**Built  
Environment**

**Social  
Environment**



*Source: Suzanne Garon,  
University of Sherbrooke*

# Original WHO Global Age-Friendly Project (2006-2007)

Initial reasons behind WHO project: dual trends of population aging and urbanization

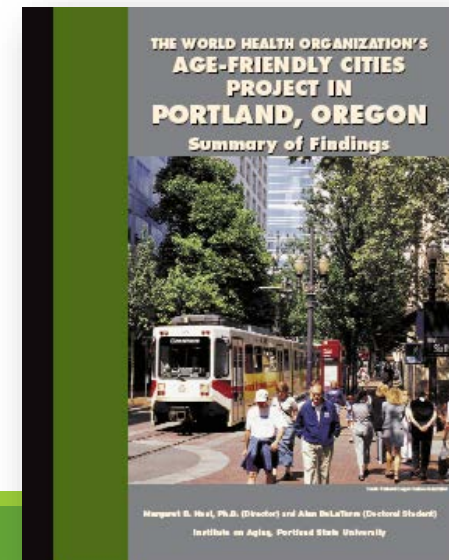
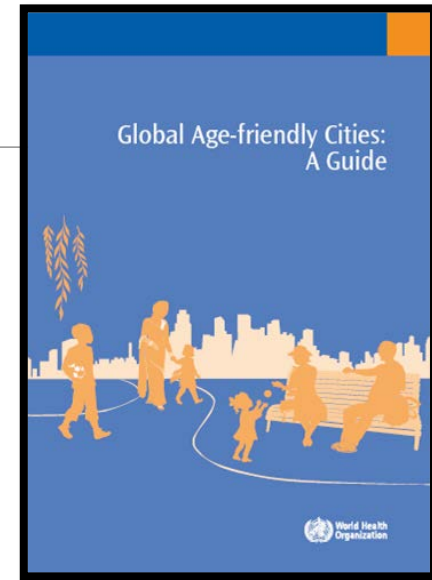
## Objectives

For WHO:

- Identify concrete indicators of an age-friendly city
- Produce a guide to stimulate advocacy, community development and policy change to make cities more age-friendly

For participating cities (33 cities in 22 countries):

- To increase awareness of local needs, gaps and ideas for improvement in order to stimulate development of a more age-friendly city



# Original Age-Friendly Collaborating Cities



## AMERICAS

Argentina, La Plata  
Brazil, Rio de Janeiro  
Canada, Halifax  
Canada, Portage La Prairie  
Canada, Saanich  
Canada, Sherbrooke  
Costa Rica, San Jose  
Jamaica, Kingston  
Jamaica, Montego Bay  
Mexico, Cancun  
Mexico, Mexico City  
Puerto Rico, Mayaguez  
Puerto Rico, Ponce  
USA, Portland

## EUROPE

Germany, Ruhr  
Ireland, Dundalk  
Italy, Udine  
Russia, Moscow  
Russia, Tuymazy  
Switzerland, Geneva  
Turkey, Istanbul  
UK, London



## AFRICA

Kenya, Nairobi

## SOUTH-EAST ASIA

India, New Delhi  
India, Udaipur

## EASTERN MEDITERRANEAN

Jordan, Amman  
Lebanon, Tripoli  
Pakistan, Islamabad

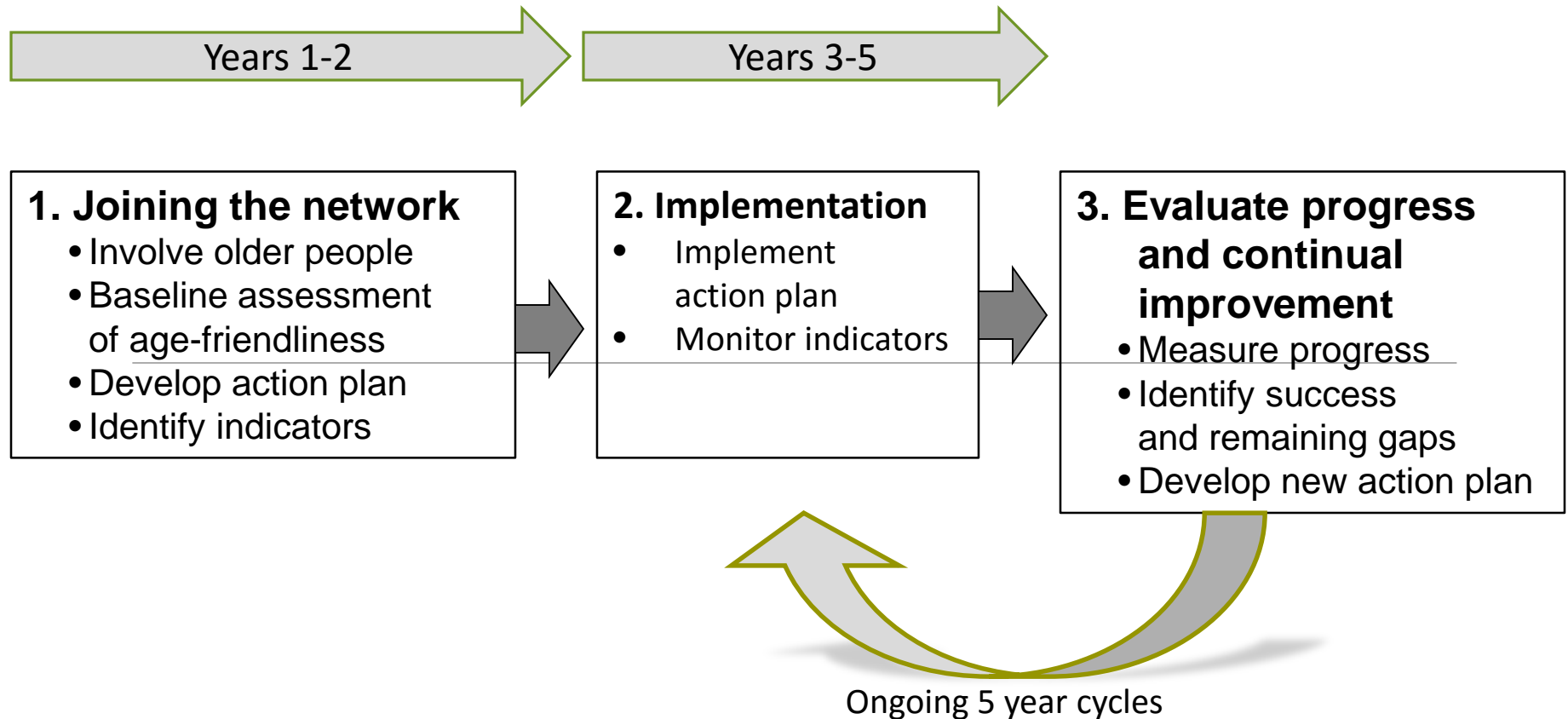
## WESTERN PACIFIC

Australia, Melbourne  
Australia, Melville  
China, Shanghai  
Japan, Himeji  
Japan, Tokyo

Credit: BC Ministry of Health



# WHO Cycle for Global Network of Age-friendly Cities and Communities®



# WHO Global Network of Age-Friendly Cities and Communities

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**400** cities and communities in 37 countries, covering over 146 million people worldwide

**10+** Affiliated Programs (e.g., Pan-Canadian Age-Friendly Communities Initiative; Ireland)

- In the U.S., AARP is an affiliated program and has **163** communities and counting

Other programs, too, advance similar goals (e.g., Community AGEnda, Lifelong Communities, Village-to-Village Network)

# Why Should Communities Move Toward Becoming More Age Friendly?

## The Case for Age-Friendly Communities



Prepared for  
Grantmakers In Aging

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February 2016

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*“Many thought leaders now believe that the **communities that fare best** in the 21<sup>st</sup> century will be those that both tackle the challenges and **embrace the positive possibilities** that an aging population creates.”*

*- Grantmakers in Aging (2013)*



# Unprecedented Social and Demographic Changes

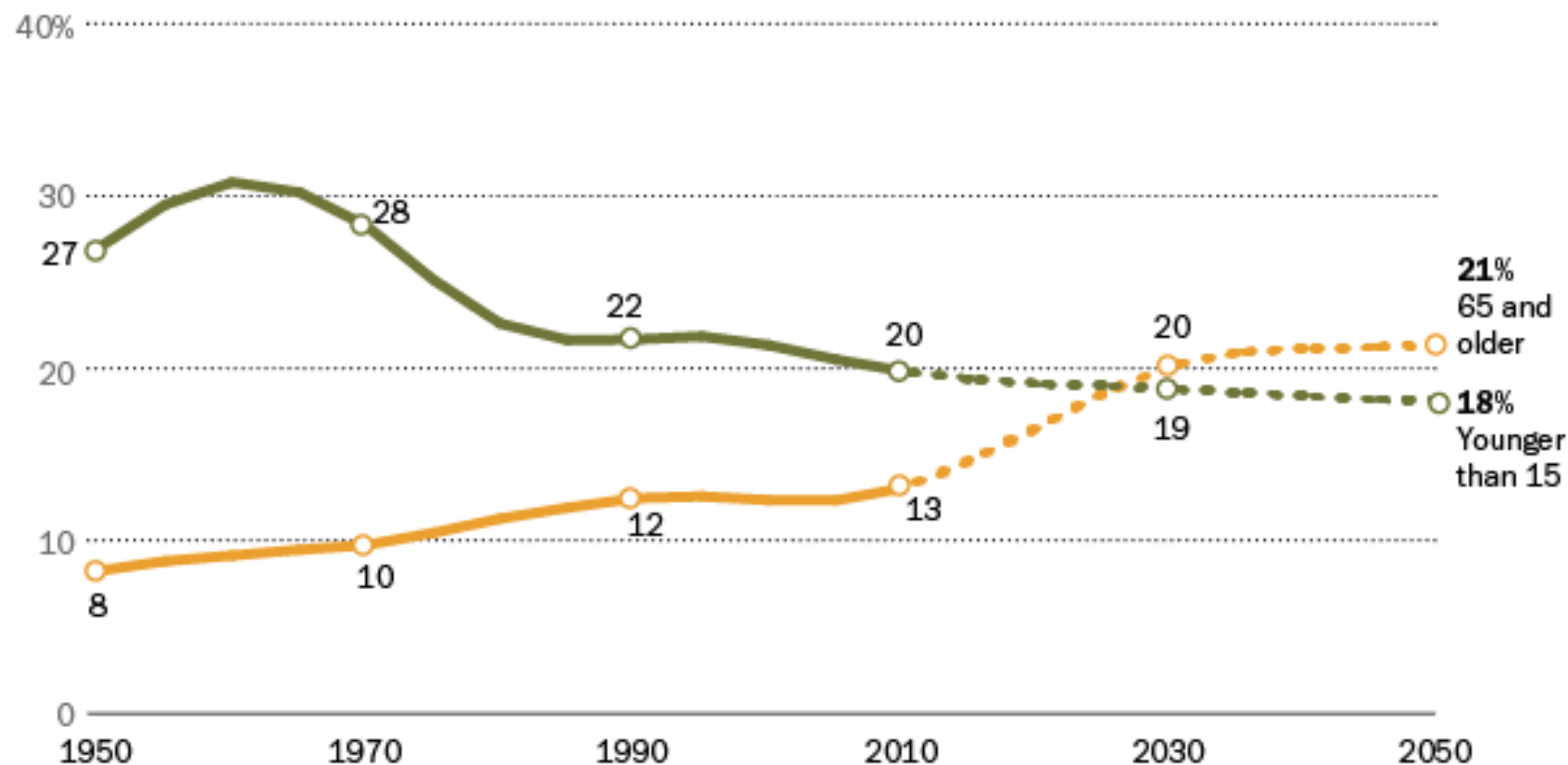
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Population aging: The older adult (65+) population is growing in size and proportion, particularly the oldest old:

- In 2014, 46 million, or 15% of U.S. residents, were 65+; by 2030, nearly 21%
  - The growth in the size of the 65+ population between 2012 is a **40.7% projected increase**, compared to a projected growth of 12.4% in the U.S. population overall
- In 2050, the % 65+ will be 20.9% → the aging of the U.S. population will be a sustained trend



*Percent of population younger than 15 and 65 and older in the U.S.*



Source: United Nations, Department of Economic and Social Affairs, *World Population Prospects: 2012 Revision*, June 2013, <http://esa.un.org/unpd/wpp/index.htm>

PEW RESEARCH CENTER

# Other Important Demographic Trends

Rapid growth of the “oldest old”

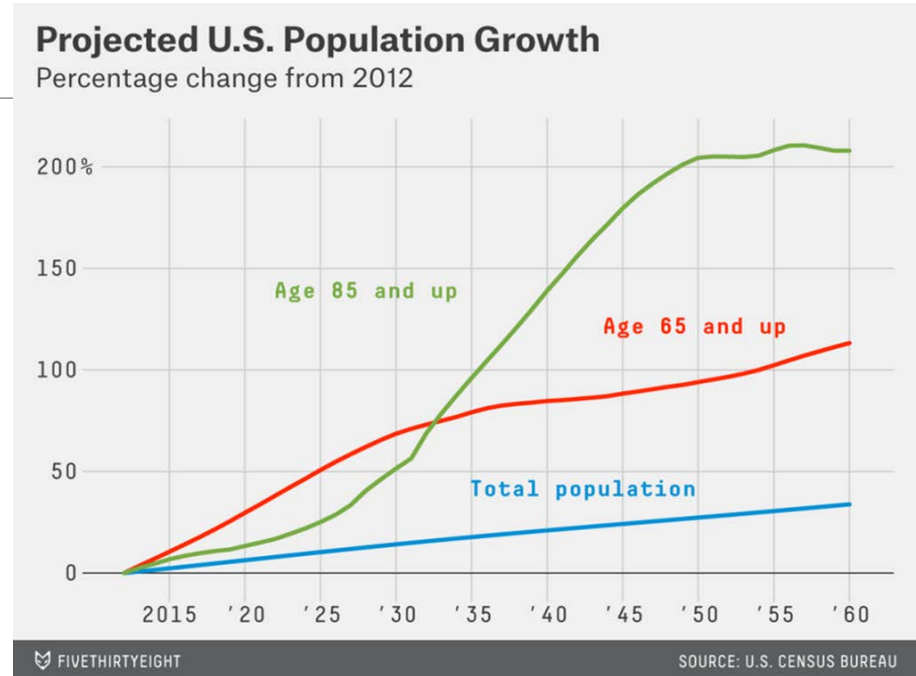
Urbanization/yet aging of rural populations

Increasing diversity

Changing housing preferences

Concerns re: economic security

Changes in health & prevalence of disease/disability



# WHY Should We Care?

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- Unlike most natural resources, **older adults are a growing resource** - the only natural resource that is increasing
- Also, **population aging presents a set of opportunities:**
  - economic benefits
  - social capital benefits
  - opportunities related to innovations in housing and physical infrastructure
  - health and other benefits
- An “age-friendly” community can benefit people of **all** ages and abilities

# Yet...

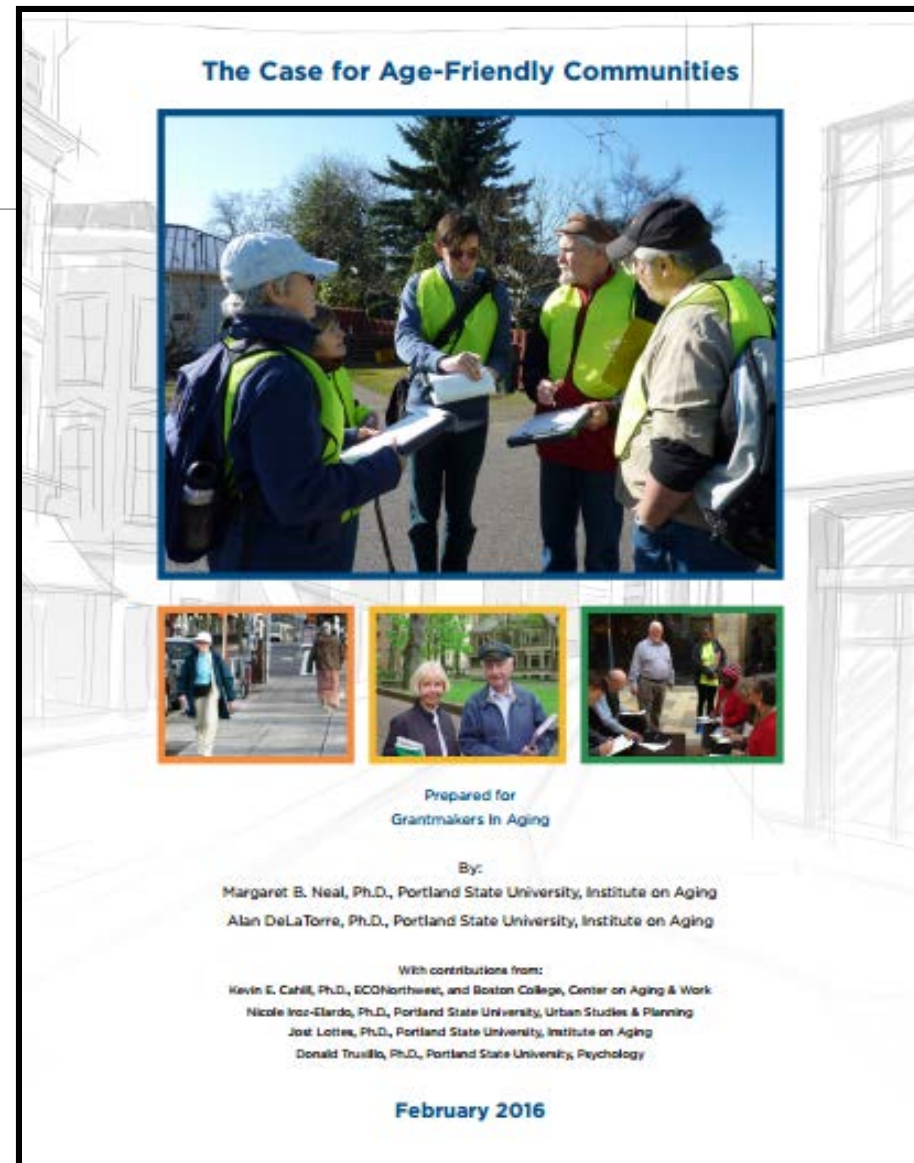
- Although we ALL are aging, **little planning** has occurred
- And policy makers, business owners, community leaders, individuals have not always immediately seen the **benefits** of population aging:
  - The business case/value proposition/return on investment/economic and social case, had not been made

**So...** Grantmakers in Aging, through its Pfizer-funded Community AGEnda project, contracted with PSU's Institute on Aging to develop this case



# Method

- Reviewed academic and “gray” literature
- Consulted with experts
- Drafted document
- Received feedback from GIA, consultants, colleagues
- Revised
- Final formatting and release by GIA

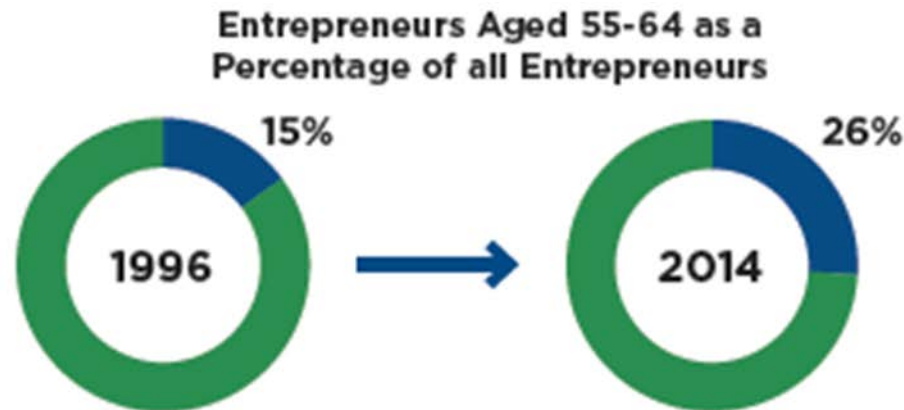




# Age-Friendly Communities (AFCs) have *Economic Benefits*

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- Older adults are an important part of the workforce and **expand the labor pool** from which employers can hire and thus address **labor shortages** (Toossi, 2012; Burtless, 2013).
- Older workers can **enhance organizational productivity** and business outcomes (Aon Hewitt, 2015).
- Adults aged 55-64 start one-third **more new businesses** than younger adults aged 20-34 (Kauffman, 2015).



- 
- Older adults have enormous **economic clout as consumers** (Oxford Economics, 2013).
  - The older adult market is **stimulating new companies, products, services, and technologies** (Oxford Economics, 2013).
  - Older adults bring **tourism dollars** (Alén, Domínguez, & Losada, 2012; Patterson, 2006).



Winter Park Health Foundation

# AFCs expand *opportunities for tourism* by older adults, contributing to the *local economy*

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- Tourists spend 3-4 times more on shopping while travelling than the average shopper (Patterson, 2006)
- The segment of adults age 55+ has been shown to be the group that will increase the overall volume of tourism the most (Patterson, 2006)
- Not only the substantial numbers but also the increased financial means and time flexibility make the older adult consumer segment attractive to tourism (Boksberger & Laesser, 2009)



4-designer.com

# AFCs bring opportunities related to *housing and physical infrastructure*

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- AFCs have **physical environments that work for everyone** (8 80 cities, n.d.).
- The growing older adult population will **increase demand for alternative housing** arrangements (McIlwain, 2012; Joint Center for Housing Studies (JCHS), 2014).
- AFCs offer a **continuum of housing options and supportive services, reducing the need for moves and preventing/postponing public and private expenditures for long-term institutional care** (JCHS, 2014).
- **Affordable housing can have positive economic and fiscal impacts** for the public and private sectors (Cohen & Wardrip, 2011; Wardrip, Williams, & Hague, 2011).

# *AFCs meet the housing needs of all* by including housing with a range of prices and supportive features

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- ½ of those aged 65+ who are renters or homeowners with a mortgage are **housing-cost burdened** (paying > 30% of their income for housing) (JCHS Harvard, 2015 )
  - This limits their ability to pay for other needs and services
  - Affordable housing has a **positive economic and fiscal impact for the public and private sectors** (Cohen & Wardrip, 2011)
- **Accessible housing with services** can alleviate challenges faced by the approximately 70% of people reaching age 65 who are expected to need some form of long-term care (JCHS Harvard, 2015)





# AFCs have physical environments that are accessible and *enhance mobility for everyone*

- Universal design can create **inclusive** environments, products and services that are:
  - safer (reduce falls/health care expenses)
  - accessible, attractive, and desirable for everyone
  - easily repurposed
  - add minimal in cost in new construction (KC Communities for All Ages, 2013)
- Walkable communities **reduce the risk of chronic disease and improve public health and quality of life** (Kerr, Rosenberg & Frank, 2012)
- Prevention and wellness strategies focused on the physical environment can **strengthen partnerships, build efficiencies and cost savings, and create healthier communities** (McClellan & Rivlin, 2014)



Roll & Stroll, Astoria, OR 2015

# AFCs facilitate *caregiving* by older adults, which contributes to the *economy* and *the public good*

- Older adults **provide unpaid care** for adult children, grandchildren, spouses, and other relatives
- AARP (2015) estimated that:
  - 40 million family caregivers provide 37 billion hours of care annually, at an average of 18 hours per week
  - Value estimated at **\$470 billion**
    - More than annual national Medicaid expenditures (\$469 billion)
    - More than the combined annual sales for Apple, IBM, Hewlett, and Microsoft (\$467 billion)



# AFCs facilitate *volunteering* by older adults, contributing to *economic development* and *individual health*

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- Older adults volunteered nearly **2 billion hours of service valued at \$45.7 billion**

(Corporation for National and Community Service, 2014)

- **23.6% of people aged 65+ volunteered**

(BLS, 2015)

- This **benefits non-profits and the community** and also **older adults themselves:**

- a sense of purpose and accomplishment
- increased life satisfaction
- better physical, mental, and cognitive health

(Grimm et al. 2007; MetLife/Civic Ventures, 2011)

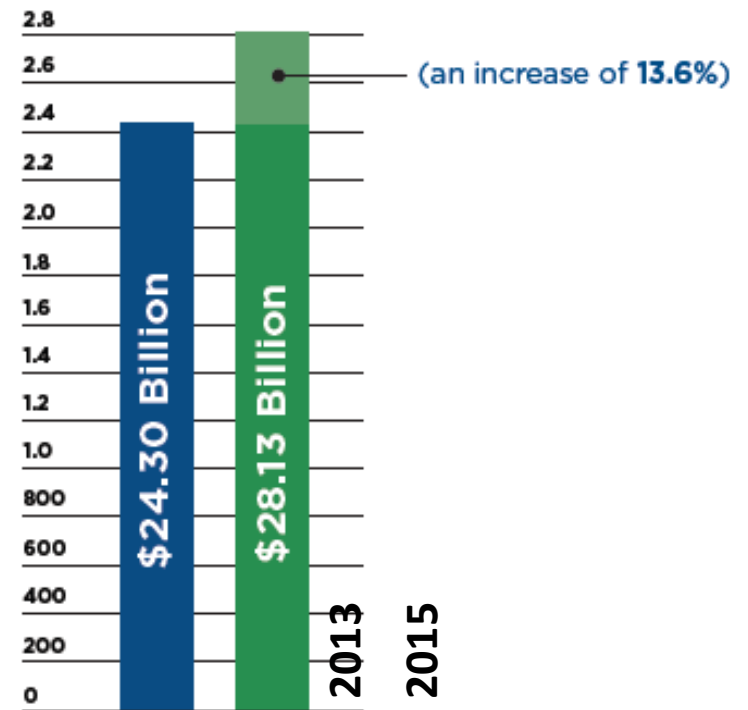
The Value of Volunteer Hours in 2014



# AFCs help retain older adults, who make *charitable contributions*

- $\frac{3}{4}$  of mid-life and older adults engage in **charitable giving** (AARP, 2013)
- Bequests produced over **\$28.13 billion in charitable contributions** in the U.S. in 2015
  - This is nearly **60% more than all gifts from businesses and corporations** (Giving USA Foundation, 2015)
- Such testamentary gifting is expected to increase in coming years due to the growth in **intergenerational transfers**
  - The total wealth transfer to Baby Boomers has been estimated at **\$8.4 trillion** (MetLife, 2010)

Giving Through Bequests



# AFCs help retain older adults, who “care for place”

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- **Older adults add vibrancy by interacting with neighbors more** than any other age group (Joint Center for Housing Studies of Harvard University, 2004)
- **Older adults “care for place”** by volunteering, advocacy, giving advice and support, and effecting change (Wiles & Jayasinha, 2013)

In sum, AFCs attract, retain and support older adults, yielding *economic, social, political, and environmental benefits*



**Trees grow stronger over the years,  
rivers wider. Likewise, with age,  
human beings gain immeasurable  
depth and breadth of experience  
and wisdom. That is why older  
persons should be not only  
respected and revered; they should  
be utilized as the rich resource to  
society that they are.**

**— United Nations Secretary  
General Kofi Annan<sup>305</sup>**

# Experts in Their Own Aging

A FILM ON EVERYDAY LIFE AS EXPERIENCED BY OLDER ADULTS

“Aging in Rural Oregon”

From “Experts in Their Own Aging” DVD



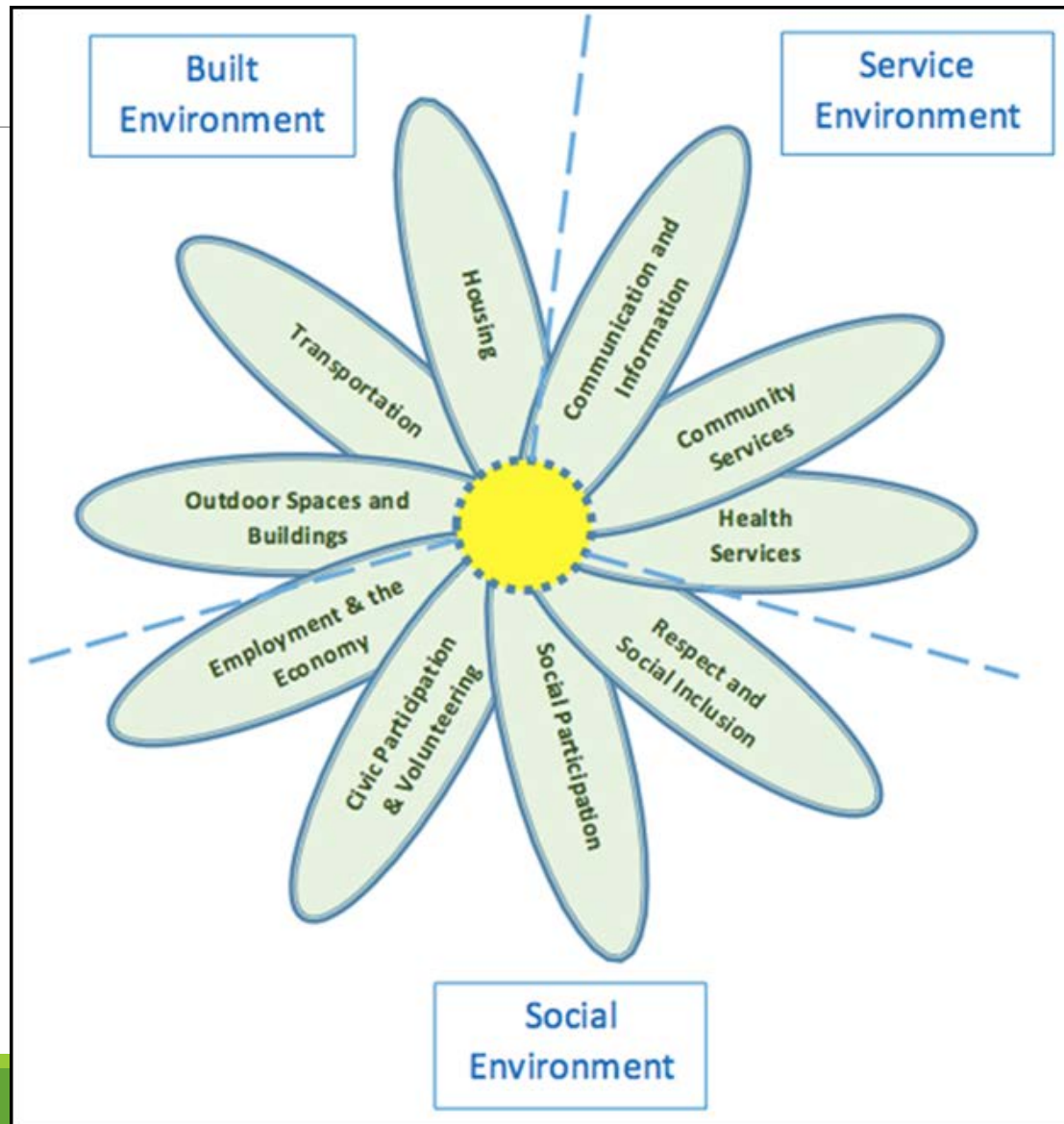
Activities (9:21)  
Age-friendly City (8:17)  
Selectivity, Optimization, and Compensation (19:21)  
Life Course Perspective (16:46)  
Surprises of Aging (8:07)  
Pleasures of Aging (11:35)  
Messages to Providers (15:21)  
Difficulties of Aging (16:41)  
Rural Aging (8:18)

For more information  
contact Dr. Diana White,  
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[dwhi@pdx.edu](mailto:dwhi@pdx.edu)

Available for Purchase :\$20



# Key Elements for an Age Friendly Community



# Some “how-tos” or steps to take to begin enhancing community age friendliness

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## 1. Getting started

- Identify political and community leadership and commitment to idea
- Organize stakeholders
- Establish advisory committee
- Involve older adults



<http://www.eldersinaction.org/about/>

## Steps (cont.)

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2. Begin planning
  - Gather data
  - Define the critical issues and priorities
3. Create a written action plan
  - Endorsed by local leaders
  - With monitoring mechanisms
  - Include key indicators of progress

### Action Plan for an Age-Friendly Portland



Prepared by:

The Age-Friendly Portland Advisory Council

October 8, 2013

## Steps (cont.)

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4. Begin implementation

5. Evaluate

- Monitor progress  
*from the beginning*
- Adapt, revise plan  
as needed

# Evaluating Your Age-Friendly Community Program

A Step-by-Step Guide

2014

Prepared for the  
AARP Public Policy Institute

by

Portland State University  
Institute on Aging

Margaret B. Neal, Ph.D.  
Iris Wernher

[http://www.aarp.org/livable-communities/  
network-age-friendly-communities/  
info-2014/evaluation.html](http://www.aarp.org/livable-communities/network-age-friendly-communities/info-2014/evaluation.html)



# One example of how to structure the effort: the Portland/Multnomah County initiative

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- ✓ One organization **coordinates** the effort (PSU Institute on Aging)
- ✓ The work is **guided** by an **Advisory Council**
  - Members represent various sectors (public and private community partners) for input into the action plan
  - Members are at the leadership level
  - Include liaisons from Commissioners' offices
- ✓ Advisory Council was approved via resolution by City Council (and later by County Board of Commissioners)
- ✓ Advisory Council developed a charter

## Structure (cont.)

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- Age-friendly domain-specific working committees established, each chaired by an Advisory Council member and facilitated by an IOA staff member
- Not ALL domains represented yet; Advisory Council prioritizes each year
- Frequency of meetings:
  - Advisory Council has met monthly since 2011; likely moving to bi-quarterly then quarterly
  - Working committees generally meet monthly (but some less frequently), and some have created subcommittees

# Challenges faced in our and others' age-friendly efforts

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**Multiple mayors, multiple visioning efforts** – continuity challenges

**Multiple jurisdictions** providing different services:

- City: infrastructure, maintenance, parking
- County: social services, aging services “Helpline”
- Region: transportation, long-term planning

Scarcity of government **resources**

- For coordination, maintenance, development and redevelopment

# Challenges (cont.)

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**Differing priorities** of stakeholders (e.g., elected officials, staff, private sector, community members) such as homelessness, low high-school graduation rates, economic development needs, bike friendliness

**Who should have responsibility** for the initiative – City? County? Non-Profit?

- Limitations in the university's role; can coordinate, do research, provide advice, but government/non-profits/business must implement the plans

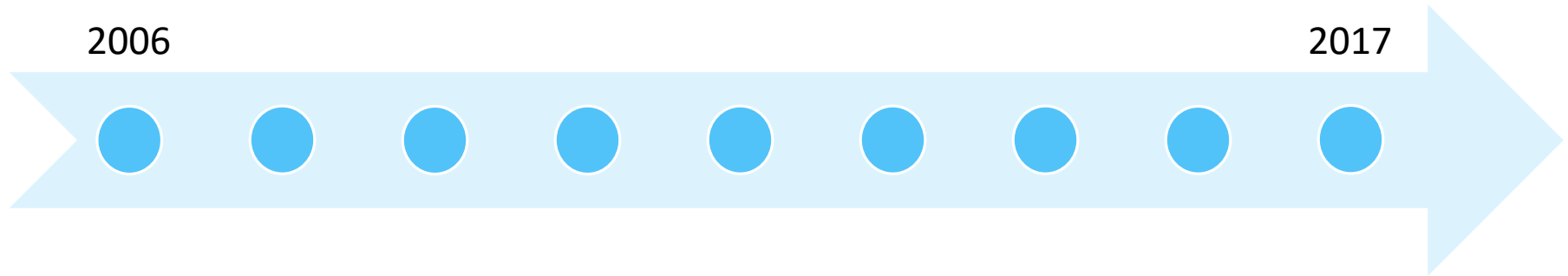
**Little funding** for coordination, operating funds

**Lack of data:** local, quantitative, neighborhood-level

# Some advice

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Remember that efforts such as these  
take time



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Form partnerships; these are critically important

A collective impact approach seems to work





# Collective Impact Approach

- Portland's effort is built on partnerships following a collective impact approach, with PSU IOA serving as “backbone organization”

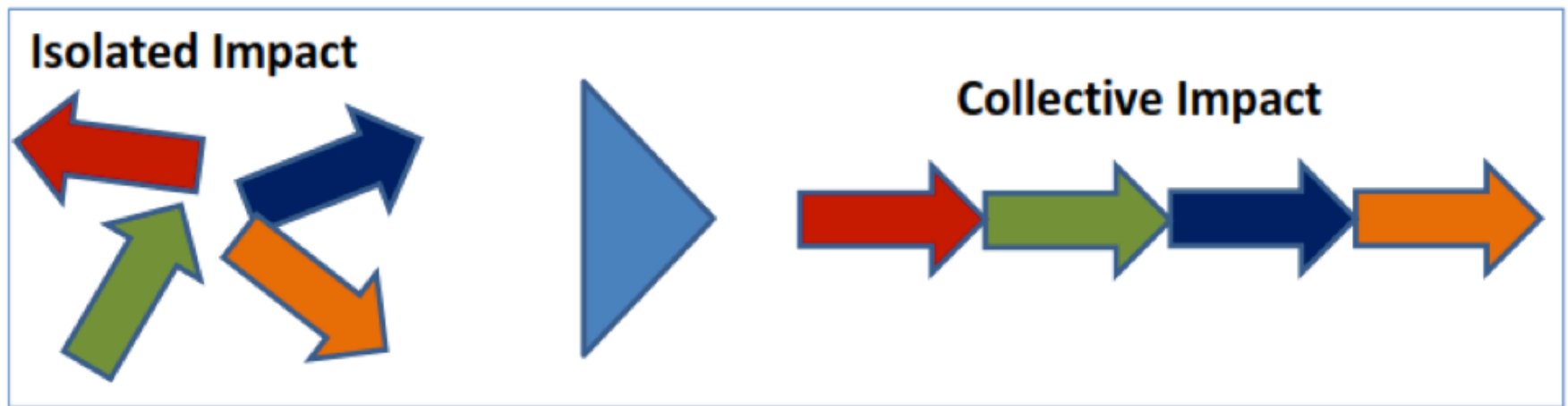


Image: seetheconnection.com

- Emphases:
  - ✓ Older adults as assets
  - ✓ Recognition of intergenerational interdependence
  - ✓ Engaging older adults
  - ✓ Policy adoption/change

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# Take advantage of windows of opportunity for policy change



# Kingdon's Agenda Setting Framework

John Kingdon's (1984) theory of how “agenda setting” for public policy change occurs:

- **Policy can be adopted/changed when a *window of opportunity* opens** (e.g., visioning exercises, strategic planning effort); and
- At least 2 of 3 conditions must be realized:
  - ✓ **A problem is defined/recognized** (e.g., population is aging yet no planning)
  - ✓ **Policy options/alternatives exist** (e.g., age-friendly approaches)
  - ✓ **Political climate, support or will exists** (e.g., elected leader as a champion)



Image: ducc-kw.com

# 4 mayors, 3 visioning/planning efforts and 11 years later...

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- Some successes in shaping age-friendly policies
- Partners actively engaged in policy and political processes
- There is a policy foundation on which to build to implement programs, policies

# Lessons learned

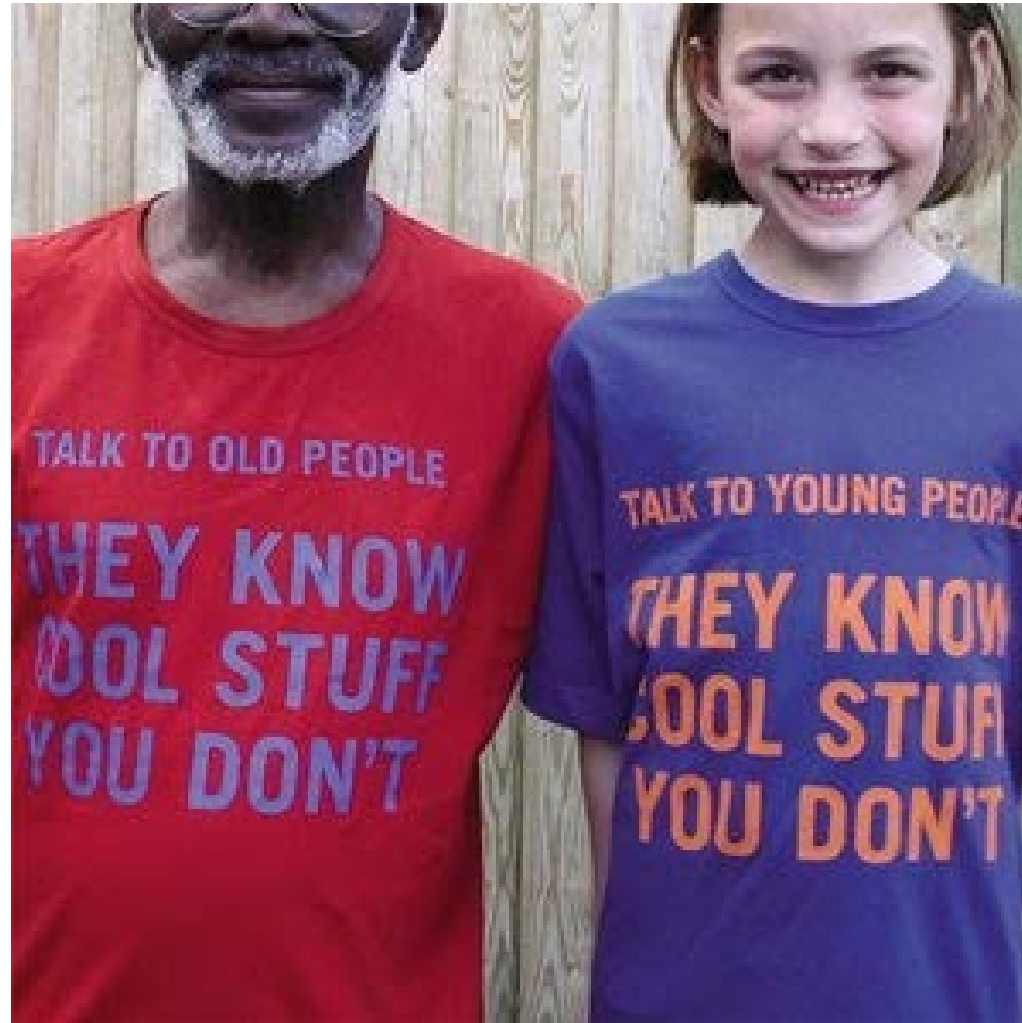
1. **Time, persistence, patience and commitment** are required (“Slow and steady wins the race” – at least much of the time)
2. **Multi-sectoral and public-private involvement/partnerships are key** (e.g., government, community services, advocates, business, diverse communities, faith community)
3. **Not only is collaborating** with community partners essential; so is **recognizing** their contributions
4. **Existing initiatives or policy windows can provide opportunities to advance the work** - look for, take advantage of these and possible alliances
5. **Data are important**, providing the impetus for the work and support for continuation (although may or may not guide decision making)

# Lessons Learned (cont.)

- 6. Local politics, the political process and jurisdictional issues play a key role – be aware**
- 7. Changes in government leadership are likely - be mindful of and proactive about these**
- 8. Local elected officials with the necessary political will to champion the work are required**
- 9. Accept that there will be competing agendas**
- 10. Be of service:** be prepared to offer written responses, be willing to meet with and testify to government staff/elected officials/commissions
- 11. Embrace new challenges:** for me, this initiative has taken the concept of applied research to a new level



12. Finally, recognize that **the generations are intertwined**:  
age-friendly communities are good for  
the young, old and everyone in between



In conclusion:

*“What we do **now** to make our communities good places to grow up and grow old will yield returns not only for **today’s elders** but also **tomorrow’s** – that is, for **all of us**.”* – p. 30

<http://www.giaging.org/resources/the-case-for-age-friendly-communities>

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