



**Proceedings from the New Jersey
White House Conference on Aging Regional Forums
for Consumers, Caregivers and Providers
3 Dates, 3 Locations**

<p>Central NJ Forum Friday, May 15, 2015 9:30 AM – 12:30 PM SpringPoint Senior Living Meadow Lakes Complex East Windsor</p>	<p>Southern NJ Forum Wednesday, June 10, 2015 9:30 AM – 12:30 PM Betty and Milton Katz Jewish Community Center Cherry Hill</p>	<p>Northern NJ Forum Friday, June 26, 2015 9:30 AM – 12:30 PM Aidekman Family Campus Center Whippany</p>
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NJ Stakeholder Recommendations for the 2015 WHCoA

Retirement and Economic Security

- Preserve Social Security benefits by maintaining the financial integrity of the Social Security Program by lifting the wage base on the Old Age, Survivors and Disability Program on the amount of earnings subject to the payroll tax each year.
- Provide more education on Social Security and other retirement investment savings tools.
- Expand financial supports through affordable housing, nutrition programs like SNAP, and by increasing Medicare coverage to include hearing aids, dental care, prosthetics, eye glasses and medical transportation.

Long-term Services and Supports

- Address workforce issues: improve reimbursements; incentivize education for caregiver careers.
- Provide for caregivers including education & emotional supports.
- Improve service coordination by utilizing medical records to enhance communication among specialists and providers.

Healthy Aging

- Empower communities to identify and address priorities for healthy aging through age-friendly initiatives.
- Strengthen program integration to promote physical, psychological, social and emotional well-being.
- Pair education (early and often) with community resources to empower people through business engagement, federal incentives and age-friendly practices.
- Promote second career options.

Elder Justice

- Recognize the role of prevention to reduce vulnerabilities by improving access to transportation, senior centers and service information and coordination.
- Create and/or make available more education programs on exploitation/scams and senior issues for first responders, prosecutors' staff, EMTs and the general public.
- Address the under reporting of abuse by family members and consider establishing a national directory of Powers of Attorneys.

Why NJ Hosted Forums

NJ's has a large, growing and diverse senior and family caregiver population. It also has an expansive provider network administering programs to address financial, social and medical needs. When it was announced the White House Conference of Aging would be held regionally (with Boston being the closest in proximity to NJ) with a single nationwide conference/webinar in Washington, D.C., advocates in NJ wanted to ensure its seniors, caregivers and providers had an opportunity to join the conversation and have their voices heard by the WHCoA sponsors and policymakers.

Planning Process

Recognizing the importance of soliciting, and then sharing with our federal partners, the input of New Jersey's aging network for the 2015 White House Conference on Aging, several statewide stakeholders met in the spring to discuss a strategic process.

The steering committee included representatives from the New Jersey Association of Senior Center Directors, the NJ Foundation for Aging, the NJ State Association of Jewish Federation, AARP-NJ, the New Jersey Area Agencies on Aging Association (NJ4A) and the NJ County Offices on Disabled.

Face to face meetings and conference call planning sessions were conducted. Initial discussions focused on the format for input related to the four WHCoA themes. It was agreed to identify four panelists to briefly address each theme as subject matter experts and vision-setters for four breakout/work group sessions to follow. The presentation of the panelists would be offered at each regional meeting and would be followed by participatory breakout/work group sessions to identify priorities within each theme.

The breakout/work group sessions, based on the four White House Conference on Aging themes, were:

- **Retirement and Economic Security:** Protecting Social Security, Work & Employment, Public Benefits
- **Healthy Aging:** Age-Friendly Communities, Preventive Care & Chronic Disease Management, Housing
- **Long-Term Services & Supports:** Caregiver Supports, Workforce Capacity, Managed Long-Term Services & Supports
- **Elder Justice:** Fraud Protections, Scams, Family Exploitation and Neglect

The steering committee noted that WHCoA themes failed to recognize the need for affordable housing as well as transportation related to access services as important quality of life issues. Consequently these issues were included within the discussion of the four themes as they related to NJ residents.

Three regional forums were held, each publicized through aging network partners. At each forum, a handout titled “Questions to Consider” was distributed to all attendees. The questions fostered discussion.

For reference documents, please consult the Appendices.

Appendix A. Planning Members

Appendix B. Biographies of the Panelists

Appendix C. Agenda, and Handout: Questions to Consider Attendees

Appendix D. Participant Affiliations

INTRODUCTION

This year, we mark the 50th anniversary of Medicare, Medicaid, and the Older Americans Act, as well as the 80th anniversary of Social Security. The 2015 White House Conference on Aging is an opportunity to recognize the importance of these key programs as well as to look ahead to the next decade.

HISTORY OF THE WHITE HOUSE CONFERENCES ON AGING

The first White House Conference on Aging (WHCoA) was held in 1961, with subsequent conferences in 1971, 1981, 1995, and 2005. These conferences have been viewed as catalysts for development of aging policy over the past 50 years. The conferences generated ideas and momentum prompting the establishment of and/or key improvements in many of the programs that represent America's commitment to older adults and caregivers.

2015 WHCOA THEMES

Retirement security is a vitally important issue for today's and tomorrow's older adults. Financial security in retirement provides essential peace of mind for older Americans, but requires attention during our working lives to ensure that we are well prepared for retirement.

Healthy aging will be all the more important as baby boomers age. As medical advances progress, the opportunities for older Americans to maintain their health and vitality should progress as well and community supports, including housing, are important tools to promote this vitality.

Long-term services and supports remain a priority. Older Americans overwhelmingly prefer to remain independent in the community as they age. They need supports to do so, including a caregiving network and well-supported workforce.

Elder justice is important given that seniors, particularly the oldest older Americans, can be vulnerable to financial exploitation, abuse and neglect. The Elder Justice Act was enacted as part of the Affordable Care Act, and we need to realize its vision of protecting seniors from scam artists and others seeking to take advantage of them.

FORUM PROCEEDINGS

The first regional forum was held May 15th in central New Jersey at the SpringPoint Senior Living Meadow Lakes Complex in East Windsor. The agenda included welcoming remarks, a brief history of the White House Conference on Aging, and panel presentations on the four major themes to be discussed in the breakout/work sessions. The panel presentations were videotaped for use at the southern and northern forums as well.

The southern regional forum took place on June 10th at the Betty and Milton Katz Jewish Community Center in Cherry Hill, and the northern forum was held on June 26th at the United Jewish Communities of MetroWest's Aidekman Family Campus in Whippany.

The forum sites were selected to accommodate as many interested participants from throughout the state as possible. Nearly 220 persons registered including both consumers and providers (See Appendix D). The session format for each location was uniform in design. Following the historical overview and panelists presentations, the participants were divided into one of four breakout/work sessions for which they preselected according to their interest as stated on their registration based on the four WHCoA themes.

Each breakout/work session was supported by a facilitator and a recorder/scribe. Participants were provided a handout of "Questions to Consider" and were invited to suggest recommendations related to the theme of the breakout/work session. In most cases, an extensive list was developed and participants then voted to determine the three most important recommendations. The top three recommendations of each group were then reported out to the general session. The breakout session results are provided pages 6 and 7.

DETERMINING THE HIGHEST PRIORITIES

Facilitators and participants identified topical recommendations during the work session and participants were asked to score the recommendations. The breakout sessions' lists of the top three recommendations were presented for all the general session participants. The results were tabulated and a priority list for each theme was developed.

TOP THREE PRIORITIES

RETIREMENT & ECONOMIC SECURITY FROM THE BREAKOUT GROUPS

	CENTRAL 5.15.2015	NORTH 6.26.2015	SOUTH 6.10.2015
#1	Lift the wage base for the amount of earnings submit to the payroll tax	Increase Medicare coverage to include hearing aids, prosthetics, eye glasses, dental care and medical transportation	Explore Social Security reform in a comprehensive to preserve the benefit for future generations
#2	Prevent Congress from raiding the Social Security Trust Fund	Remove mandatory distribution of traditional IRA funds at age 70 ½	More education needed on retirement saving options
#3	Establish a federal minimum living wage for all workers	Increase supports for affordable housing through HUD and the National Housing Trust Fund and revisit policies that impact tenants and their rent	More education needed on long-term care insurance

LTSS RECOMMENDATIONS FROM THE BREAKOUT GROUPS

	CENTRAL	NORTH	SOUTH
#1	Address staff shortages	Address workforces issues: improve reimbursements, incentivize education for caregiver careers	Create a LTSS package to include Medicare & Medicaid with physical, social, mental and emotional wellbeing
#2	Offer flexible work schedules for caregivers	Increase transportation availability and capacity for access to services with consumer enhancements like travel training	Provide support for caregivers including education & emotional supports
#3	Utilize medical records to enhance communication among specialists and providers	Increase services coordination	Fund demonstration projects that are interdisciplinary with caregiver support, transportation, etc.

HEALTHY AGING RECOMMENDATIONS FROM THE BREAKOUT GROUPS

	CENTRAL	NORTH	SOUTH
#1	Start intergenerational programming early	Strengthen program integration that promote physical, psychological, social and emotional well-being	Public funding needed to support and promote evidence-based chronic disease self-management education programs
#2	Pair education with community resources to empower people: business engagement, federal incentives and age friendly. And promote second career options.	Empower communities to identify and address priorities for healthy aging through age-friendly initiatives	Medicare reform needed to provide coverage for hearing aids and dental care
#3	Develop an electronic application for transportation to get to and from doctor appointments for linking to volunteer drivers.	Create ways for stakeholders to connect to learn more about resources and opportunities to partner	Healthy aging programs should be targeted to younger people to ensure improved habits and quality of life; should focus on general health and wellness; and should engage employers

ELDER JUSTICE RECOMMENDATIONS FROM THE BREAKOUT GROUPS

	CENTRAL	NORTH	SOUTH
#1	Public awareness campaign funding needed	Recognize the roles of prevention to reduce vulnerabilities: transportation, senior centers, service information and coordination	Education on exploitation/scams and senior issues for law enforcement and EMTs
#2	Increase coordination between agencies and increase funding for care activities	Mandatory training for first responders and training for others such as prosecutors' staff, legal services, etc.	Increase funding
#3	Address the under reporting of abuse by family members and provide protection for the elder	Establish a registry for Powers of Attorneys	Promote interdisciplinary coordination and cooperation

INTEGRATING INPUT AND TRENDS ACROSS THE FORUMS

The results were tabulated to identify and formulate the top three priorities under each theme across the three forums were presented above. This process yielded a list of 12 recommendations for the submission to the 2015 White House Conference on Aging. Members of the full planning group reviewed the ideas to ensure that the final language best reflects the intent of the stakeholders who participated in the sessions. Upon approval, the report was to be submitted to the WHCoA through electronic submission.

NJ STAKEHOLDER RECOMMENDATIONS FOR THE 2015 WHCOA

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Healthy Aging

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APPENDICES

Appendix A- Planning Members

Jacob Toporek, Executive Director, N.J. State Association of Jewish Federations
Grace Egan, Executive Director, New Jersey Foundation for Aging
Melissa Chalker, Deputy Director, New Jersey Foundation for Aging
Joanne Fetzko, Executive Director, Somerset County Office on Aging
Lorraine Joewono, Executive Director, Bergen County Office on Aging
Beverly Mishkin, Jewish Family & Children's Service of Greater Mercer
Donna Fucetola, West Windsor Senior Center
Renee Burns, Robbinsville Senior Center
Marilyn Askin, AARP
Richard Satyavan, AARP
Jim Thebery, County Offices on the Disabled

Appendix B- Panelists Biographies

Karen A. Zurlo, Retirement and Economic Security

Karen A. Zurlo, PhD, is an Assistant Professor at the Rutgers University School of Social Work and is affiliated with the Institute for Health, Health Care Policy and Aging Research as well as the Huamin Research Center – which focuses on well-being in China. Her teaching and research focus on gerontology and more specifically, retirement security. Her research pertains to factors affecting financial well-being, and its influence on positive and negative mental health outcomes as they relate to retirement income and economic security.

She has published in social work and health policy journals and has presented her research at local, national, and international conferences. In many of her publications she addresses the issue of retirement as an extended phase of life, which affects the long-term health and welfare of a burgeoning number of older Americans. As members of the baby boom generation retire, they will participate in a system of care that is not structured to provide income or health care for the period that it will be needed. Because the inadequacies of the current system could undermine positive economic gains achieved by older Americans, Dr. Zurlo has conducted research projects in New Jersey and beyond affecting the well-being of vulnerable older adult populations. Her more current projects focus on debt and its effects on financial security as well as the economic burden of out-of-pocket medical expenditures among Medicare beneficiaries.

Sajida H. Mokhashi, Healthy Aging

Sajida H. Mokhashi, MD is a clinical instructor at the Department of Family Medicine and Community Health at Rutgers-Robert Wood Johnson Medical School. She is fellowship trained in Geriatrics and holds Certificate of added qualifications in Geriatrics. She is board certified by ABFM. She practices both inpatient and outpatient medicine. She works as a hospitalist at RWJUH and also sees her Geriatric patients at the Center for Healthy aging at Monroe (CHAM). She teaches the Geriatric fellow, Medical students and PA students during their hospital rotations. Her special interests lie in improving quality of life for senior

citizens as well as coordinating end of life care for terminally ill patients. She is an active member of the American Academy of Family Physicians and American Geriatrics Society.

Graduate Education: Jawharlal Nehru Medical College, India

Internship: Louisiana State University, New Orleans, LA

Family Medicine Residency: RWJMS -CentraState Family Medicine Residency Program, Freehold, NJ

Fellowship: Geriatrics at RWJ Medical School, New Brunswick, NJ

Board Certifications: ABFM and CAQ Geriatrics

Roberto Muñiz- Long-Term Services and Supports

Roberto Muñiz has been the President and CEO of The Francis E. Parker Memorial Home, Inc., with headquarters based in Piscataway, NJ, for over sixteen years and has more than 25 years of experience in the field of health and senior care services. Roberto is a past national board member and a fellow of the American College of Health Care Administrators, and is the past chairman and currently serves as a member of the board of trustees of the New Jersey Foundation for Aging. He also currently serves as a member of the board of LeadingAge New Jersey and chairs their education committee; he is also a board member of the LeadingAge national organization. Roberto is a member of the board of trustees of New Brunswick Tomorrow and is a founding member of the Life Enrichment Aging Project Professionals (LEAPp).

Mr. Muñiz is the recipient of the 2013 “Leaders of Tomorrow” Award presented by *Long Term Living Magazine* and has received numerous other awards, including the Distinguished Service Award from LeadingAge NJ, as well as the Distinguished Service Award from the National American College of Health Care Administrators.

Since 2012 Roberto has served as a part-time instructor at Rutgers University’s Edward J. Bloustein School of Public Planning and Public Policy, where he teaches Long Term Care Management and Health Care Systems. Mr. Muñiz has a Bachelor’s Degree in Public Health Administration and a Master’s Degree in Public Administration, both from Rutgers University. He is a Licensed Nursing Home Administrator (LNHA) in both New Jersey and New York.

Helen Dodick, Elder Justice

Helen C. Dodick has been serving as Acting Public Guardian for the past six years. She received her BA from the University of Pennsylvania and her JD from Temple Law School. She was affiliated with several Philadelphia law firms prior to co-founding a law practice in Morristown, New Jersey. She has extensive experience counseling elderly and disabled clients, and has served in the role of court appointed attorney, guardian, and *guardian ad litem* in probate court proceedings. In addition, Ms. Dodick administered federally funded mental health and developmental disability advocacy programs.

Appendix C- C.1 Agenda for the Forums and the Handout



Regional Forums on the White House Conference on Aging for Consumers, Caregivers and Providers

9:00 Registration and Refreshments

9:30 Call to order
Welcome

9:45 History of the White House Conference on Aging
Lowell Arye, Deputy Commissioner, NJ Department of Human Services

10:00 Panelists Presentation

Introduction of Panelists

Nancy Day, Director Division of Aging Services, NJDHS

Panelists:

Retirement & Economic Security

Karen Zurlo, Professor Rutgers School of Social Work

Healthy Aging

Sajida Mokhashi, MD, RWJ Med School

Long Term Services & Supports

Roberto Muñiz, CEO Parker Homes

Elder Justice

Helen Dodick, Acting NJ Public Guardian

11:00 Work Groups Sessions

12:00 Brief Reporting of Priorities from Work Groups

12:30 Adjournment

C. 2 Handout shared at all forums

Questions to Consider in Your Work Group

Retirement & Economic Security

1. What strategies can be adopted at the federal level
 - a) to help boomers and older adults increase their savings, and
 - b) to develop new and /or access existing retirement plans through employers?
2. What are good practices that the federal government can employ to reduce the misperceptions among employers that older workers are more costly than younger workers because of higher absenteeism, higher wages, higher pensions, and increased use of healthcare and other benefits?
3. What policies are needed to assist individuals and families in financing long term services and supports (inclusive of non- medical supports)?
4. How can the administration of benefits programs for lower income older adults be streamlined to provide better access to the programs while limiting /erasing duplicate paperwork?
5. What strategies can be used to ensure health insurance programs such as Medicare/Medicaid/Retirement Insurance Plans work together to provide better coverage for aging Americans?

Healthy Aging

1. How can changes in federal policies assist employers in educating employees and providing workplace programming to promote healthy aging?
2. What strategies/incentives would you recommend to the federal government to increase healthy eating and access to healthy/locally grown food?
3. What strategies/incentives would you recommend to CMS/ACL to increase the use of Medicare's health and wellness, prevention, health screening and immunization benefits? Are there other health benefits that Medicare should cover, like eye glasses or dental care?
4. Are there federal strategies would you recommend to systematically engage communities in healthy aging and overall strategies to make communities livable and age friendly across the lifespan?
5. What strategies would you recommend to the federal government to increase healthy aging evidence based programs that reduce /manage depression, mental health issues and/or substance abuse among older adults?

Long-Term Services and Support (LTSS)

1. What recommendations are needed to ensure that delivery of LTSS are person centered and coordinated across silos for clinical service (OT, PT, Primary Care)?
2. How would you recommend that LTSS providers recognize the importance in identifying functional impairments and the underlying chronic health issues of individuals (including medications)?
3. What policies are needed to assist individuals and families in financing long term services and supports (inclusive of non- medical supports)?
4. How could federal policy incentivize caregiver supports:
 - a) addressing early onset individuals of dementia, and
 - b) for informal caregivers (family, friends, and neighbors) for older adults?
6. What innovative financing mechanisms might the ACL/CMS consider to support aging network services?

Elder Justice

1. What strategies would you recommend to CMS/ACL for the legal services provided through the aging services network (OAA/ SUA/ AAA/ADRC) as a resource?
2. What federal remedies should be implemented to better protect adults from abuse by agents under powers of attorneys?
3. What strategies would you recommend to assist the federal government in addressing barriers in reporting elder abuse, fraud and exploitation?
4. What solutions would you suggest to ensure that all law enforcement officers receive some training on elder justice issues?
5. Should federal efforts be considered to institute 'uniform guardianships' in all states?
6. Are there recommendations to strengthen age discrimination laws?
7. Are there suggestions to strengthen the Social Security standards for Representative Payee?

Appendix D- Participants' Affiliations

AARP- NJ
Adler Aphasia Center
Aetna Better Health of NJ
Aging in Place Partnership
Alaris Health
All Metro Health Care
AmeriGroup
Atlantic County AAA/ADRC
Barnabas Health
Bayonne Office on Aging
Bergen County AAA Advisory Council
Bergen County AAA Div. of Senior Services
Bergen County Adult Protective Services
Bergen County Division on Disability Services
Bergen County Prosecutors Office
Bergen County Senior Services Coalition
Bergen Family Center
Bessie Mae Women and Family Health Center
Brain Injury Alliance of NJ
Camden Area Health Education Center
Camden County AAA Advisory Council
Camden County Board of Social Services APS
Camden County Dept of Health and Human Services
Camden County Health Department
Caregivers of NJ
Centers for Medicare & Medicaid Services
Community Health Outreach Consortium
Community Without Walls, Inc
Companion Care
Cooper University Hospital
East Brunswick Dept on Aging
Easter Seals NJ
ECHO, Inc
Essex County AAA Advisory Board
Evidence Based Solutions to Health
Experience Works SCSEP
Fair Share Northgate II
Family Support Coalition of NJ
Felician College School of Nursing/ Institute for Gerontology
Freedom Home Healthcare
Gloucester County AAA Advisory Board
Gloucester County AAA Div of Senior Services
Greater MetroWest Cares
Greenwood House Homecare

Greystone Park Psychiatric Hospital
Griswold Home Care- Mercer & Middlesex
Grotta Fund for Senior Care
Health Care Association of NJ
Highland Park Senior Center
Home Care Association of NJ
Home Care Council of NJ
Horizon NJ Health
Hudson County AAA/ADRC
Hunterdon County AAA Division of Senior, Disabled and Veterans Services
Interfaith Caregivers
ITN North Jersey
Jewish Family and Children Services of Greater Mercer
Jewish Family Service of Atlantic County
Jewish Family Service of MetroWest
Jewish Family Services of Clifton/Passaic
Jewish Federation of Greater Metro West
Jewish Home Family Inc
Jewish Vocational Services
JFCS
JFK Hartwyck
justiceforcarmen.org
Law Offices of Hoffman DiMuzio
Lester Senior Housing Residents
Lester Senior Housing Tenants Assn
LMR Elder Care
Meadow Lakes Residents
Meals on Wheels Burlington County
Meals on Wheels of Trenton/Ewing
Medline Industries, Inc
Mercer County AAA Advisory Council on Aging
Mercer County Office on Aging
Middlesex County AAA Office of Aging and Disabled Services
Middlesex County AAA Office on Aging Advisory Council
Monmouth County AAA Div on Aging
Monroe Twp Office of Senior Services
Montclair Senior Citizen Advisory Committee
Morris County AAA Division on Aging, Disability and Veterans
Mount Carmel Guild
Mt. Pleasant Baptist Church
New Americans of NJ, Inc
New Jersey Association of Mental Health and Addiction Agencies, Inc
NJ American Academy of Pediatrics
NJ Dental Hygienist's Association/NJ Coalition on Oral Health for the Aging
NJ Office of the Ombudsman

NJ State Association of Jewish Federations
NJ TIP @ Rutgers
Northeast New Jersey Legal Services
Ocean County AAA Senior Services
Office of the Public Guardian for Elderly Adults of NJ
Office on Aging Advisory Council
Overlook Medical Center & Community Health
Parish Nurse Council- Diocese of Camden
PennRose Management
Retired DHSS Employee
Retired Non Profit Org
Rutgers School of Social Work
Rutgers University Behavioral Healthcare
Rutgers University COPSA
RWJ Hospital Hamilton
Sage Eldercare
Saint Anne Villa
Saint Barnabas Health Center
Samost JFCS
Senior Citizens United Community Services
Senior Medicare Patrol
Serenity Health Group
Skylands RSVP of NORWESCAP, Inc
Somerset County AAA Advisory Council
Somerset County AAA Office on Aging & Disability Services
South Orange Seniors
St. Peter's University Hospital
SUdPS
Take Control of Your Health
Tenafly Senior Services Committee
The Epilepsy Foundation of NJ
The Family Resource Network
The Henry and Marilyn Taub Foundation
The Salvation Army Senior Companion Program
Union Co APS Program
Union County AAA Div on Aging
United Way of Greater Mercer County
Urban League of Hudson County Inc
US Administration on Community Living
US. Dept of Human Services
USDHHS/Administration for Community Living
VNAHG
Volunteer Center of Bergen County
Wellcare Health Plan