City of Santa Monica Human Services Division *Community and Cultural Services Department*



Evaluation of Services for Older Adults

Implications for Existing and Future Programming



April 2008

Meeting the needs of older adults today while looking forward to tomorrow.

Summary of Recommendations



During 2006, the City launched two related projects conducted by Lodestar Research & Management: the Senior Programs Evaluation, which evaluated the system of City-funded services for older adults in Santa Monica and a broader community needs assessment called Community Voices 2006, which addressed a range of target populations' needs with a special emphasis on current and future seniors.

In 2007, analysis of the findings that included demographic data and best practices research, led to the development of key recommendations for and improved system of services for current seniors, generally 65 and older, and long-term plans to meet the emerging and unique needs of baby boomers. Highlights of the recommendations include:

EMPLOYMENT, COMMUNITY ENGAGEMENT, AND LIFE-LONG LEARNING OPPORTUNITIES

- Expand opportunities for transitioning baby boomers to gain employment in the kinds of second career jobs that are interesting and challenging, ensuring they receive support in updating resumes, job searching, and interviewing.
 Provide outreach and technical support to potential employers to ensure they provide job opportunities to adults 50 plus that are appealing and match their skill levels and interests;
- Expand opportunities for seniors to audit college and university courses, receive free or low-cost life planning advising, and other tailored education services.
- Create a cadre of career and life counselors and coaches or partnerships with organizations that provide those services that have expertise in 50 plus employment and life planning issues.
- Involve older adult and youth groups in planning appropriate intergenerational volunteer opportunities for seniors to remain engaged in the community; and
- Update the system of community service opportunities in the City by offering opportunities that focus on specific social causes that have a strong personal connection to individual baby boomers and are project-based. This should include a mechanism for providing technical support to nonprofit agencies to assist them in developing community service opportunities that appeal to baby boomers.

CULTURAL ARTS AND ACTIVE LIVING

- Create new, updated venues for peer and community connections. The venue needs of baby boomers are generally different from those of older seniors and need to be considered separately, with plans for linking them critical. Upcoming seniors will prefer services that are more integrated into existing venues in the community, while older seniors who are more frail and less mobile, will require more centralized services closer to where they reside;
- Integrate a wide range of updated older adult health, recreational, and fitness related activities, such as Pilates and spinning, into existing programs and venues throughout the City;
- Encourage both public and private venues to schedule theatrical performances, lectures and concerts at times that are convenient for older seniors;
- Develop a planning committee that works with a variety of City departments, including the Cultural Affairs Division, to develop the kinds of arts and public events that are appropriate for baby boomers and current seniors and that specifically have an intergenerational focus; and
- For baby boomers, consider an alternative to the traditional senior center model, such as wellness centers that have a strong fitness focus or store front cafes with integrated gyms and high tech media labs, which have been highly successful in several communities across the country.

SOCIAL SERVICES

- Update and expand transportation services for seniors. For currently less mobile seniors, enhance transportation (paratransit) services to include door to door services as well as "door through door" companion ride programming that provides an attendant who enters into the home or destination (e.g., to assist with carrying items or safely arriving to doctor appointments);
- Develop services and opportunities that not only allow older seniors to age in place, or in their homes, but to do so in a way that keeps them engaged with and contributing to the community;
- Increase the range of support services available for those that are primary or secondary caregivers for elderly parents;
- Greatly enhance the system of social services through more intensive, coordinated social service delivery centralized at a multi-service one-stop center for older, more frail seniors that include improved case management for seniors,

daily transportation service to and from the center, and the integration of cultural, gentle fitness and social opportunities;

- Develop more intensive, updated and creative outreach strategies that are specific to baby boomers, and a separate strategy for comprehensive outreach to older seniors;
- Develop a more centralized system of information about the variety of available senior services, particularly for older seniors, including a new information and referral/hotline number and service.
- Increase efforts to provide technical assistance to senior service providers to develop indicators and outcome measures for program evaluation;
- Enhance the tailoring of older adult programming to meet the needs of specific subgroups of the current and upcoming senior population (e.g., active, low-income, financially secure, LEP immigrant, and);
- Coordinate collaborative strategic planning efforts with providers of senior services and providers of homeless services in Santa Monica to design new programs that protect seniors from becoming homeless; and
- Replace traditional congregate meal programs with more updated options, including salad and sandwich bars offering healthy, fresh food prepared on-site and/or establishing specific restaurants in the City as sites for which pre-paid meal cards can be used.

PLANNING

- Engage a diverse group of constituents in service planning including service providers, City staff, current service consumers and future consumers. The planning process should be persistent and inclusive to stay current with the evolving needs of aging baby boomers; and
- Directing efforts towards regional planning. With some older adults moving to less expensive areas on the periphery of Santa Monica and in view of the lack an adequate older adult service infrastructure, the demand for services in the City will likely increase and could be burdensome.

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I. Introduction



The City's Community and Cultural Services Department (Human Services Division) provides an array of programs for older adults through direct service programs, primarily in the areas of social events, recreation, fitness, and educational classes, as well as City-funded social services provided by local nonprofits through its Community Development (CD) program. During 2006, the City launched two related projects: the Senior Programs Evaluation project, which evaluated the system of services for older adults in Santa Monica and a broader community needs assessment called *Community Voices 2006 (CV 2006)*, which addressed a range of target populations' needs with a special emphasis on current and future seniors. In July 2006, the City contracted with Lodestar to assist with *CV 2006* and to conduct the Senior Programs Evaluation project. This report details the findings of the Senior Programs Evaluation project while including important information on the needs of baby boomers and seniors as identified in *CV 2006*.

Agencies that provide social services to Santa Monica residents are funded through the Human Services Division's CD Program, which during the FY 2007-10 funding cycle provides funding support of \$7.5 million annually to 28 nonprofit human service and housing development organizations supporting over 55 different programs. In addition, approximately \$875,000 in CD Program funds are allocated to agencies targeting seniors, with approximately \$800,000 to grantee-provided programs that do not necessarily target, but largely serve seniors, such as independent living support for people with disabilities. The general program areas serving seniors that are funded through the CD program include:

- Care management
- Adult day care
- Money management
- Paratransit services
- Home delivered meals
- Home access programming
- Independent living services
- Health care services
- Legal services
- Low vision services
- Congregate Meals at 4 sites
- Senior Latino Club

In addition, City-run direct service programs include:

- Senior Recreation Center with daily activities and classes
- Dances and smaller events
- Special community events and field trips

II. Methodology

The report is guided by five interrelated research questions related to the needs of current and future older adults in the City of Santa Monica:

- 1. What are the salient characteristics, including needs, of Santa Monica's current senior population?
- 2. How well are the needs of current seniors being addressed by the existing City-funded system of services?
- 3. What are the salient characteristics and future needs of baby boomers?
- 4. What can Santa Monica do to improve the system of services for current seniors?
- 5. What can Santa Monica do to meet the needs of baby boomers? What is a knowledge-based, refined vision for local services for older adults in the next 10 years and beyond?

The first research question listed above is answered through the findings from the *CV 2006* report and from the complementary research performed as part of the Senior Programs Evaluation project in Sections III and IV. The second question is answered through qualitative data from interviews with key informants (service providers and other knowledgeable persons) and focus groups (consumers) that construct a general picture of the quality and effectiveness of current services in Section V. Question three is closely anchored in conclusions from the first two questions and is addressed through a discussion of the characteristics of the baby boomer population in Sections VI and VII. Questions four and five are addressed in Section VIII of this report, which heavily relies on qualitative feedback and input elicited from expert key informants. This report also contains recommendations in Section IX for phased-in re-visioning and updating services for older adults in Santa Monica, both for current seniors and for baby boomers, over the next 10 years and beyond.

A.THE GENERAL COMMUNITY VOICES 2006 NEEDS ASSESSMENT

The *CV 2006* project intended to investigate and assess the needs of and services for the following target populations:

- Seniors (born before 1946)
- Baby boomers (born between 1946 and 1964)
- Homeless individuals
- Low-income (household income of less than \$35,000 per year)
- People with disabilities
- Families with school-aged children

The *CV 2006* study used several methods of information gathering to gain input from a wide range of stakeholders. These methods included surveys, focus

groups, public commission and advisory board meetings, a roundtable discussion group of agency leaders, and previously prepared reports and surveys (See the *CV 2006* report for more information on these information gathering strategies).

B. THE SENIOR PROGRAMS EVALUATION PROJECT

Data gathering for the Senior Programs Evaluation project was mostly concurrent with the *CV 2006* project, gathering data from and about seniors through all of the above-mentioned methodologies. Additional data collection occurred for the Senior Programs Evaluation several months beyond the *CV 2006* project, and included three additional data collection activities:

Focus Groups. Qualitative data for the Senior Programs Evaluation project were collected from five focus groups with seniors. These focus groups were facilitated by Lodestar and were specifically conducted for this project (Attachment A-1 lists the focus group questions used in *CV 2006* and the Seniors Evaluation Project). Six additional focus groups were conducted for both the *CV 2006* project and this evaluation project; three focus groups with baby boomers and three with seniors. In addition, three individual interviews were conducted with homebound individuals. Those data were transcribed, coded, analyzed and summarized, overall and for seniors and baby boomers separately, and, as available, by zip code.

Key Informant Interviews. Qualitative data were also collected from 17 key informants via in-person and telephone interviews by Lodestar. Interviews were conducted primarily in October and November 2006, although two respondents were reached as late as January 2007. Nine interviews were with current or former directors or managers of City-funded direct service and grantee-provided programs that serve Santa Monica seniors. Three were with local experts familiar with the senior population and services in the Santa Monica area. Five interviews were conducted with national experts across the country that are directing or consulting with innovative program models for either current older seniors or for baby boomers that would be of interest to Santa Monica.

Secondary Data Sources. Existing reports and other documents were sources of information about demographic trends and about the provision of services to both current seniors and baby boomers. The three most useful sources of secondary data were informal records of best practices research conducted by City staff during 2005 and 2006, the *Community Voices 2006* Report, and the 2003 Community Profile developed by Rand Corporation.

III. City Funded Programs Serving Santa Monica Seniors



A. CHARACTERISTICS OF SANTA MONICA SENIORS

According to the U.S. Census Bureau, 2005 American Community Survey estimates:

- Seniors (aged 65 or more) comprise approximately 14.5% of the City of Santa Monica's population (approximately 12,000 community members), higher than the County (10%), State (11%), and National (12%) averages;
- Approximately 42% of the City's seniors report at least one disability;
- Approximately 49% of senior households earn below 80% of the county median income;
- Approximately 57% of senior households are renters and most low-income seniors are renters. Most people using the City's senior center programs are in their 60's, 70's, and 80's, but a significant percentage lives independently:
- Approximately 21% of Santa Monica's single householders are over 65 years of age;
- Approximately 18% of all City households are headed by an older senior; and
- In a recent study, more than half of seniors who rent (56%) had a housing problem over the last year. Over half of the City's older adults live in zip codes 90404 and 90403.

B. CITY-FUNDED PROGRAMS

As of July 1, 2007, eight programs by two different agencies, Meals on Wheels West and WISE & Healthy Aging (the agency resulting from the recent merger of WISE Senior Services and Center for Health Aging) are funded by the City to provide services mostly to seniors. An additional five City-funded programs largely serve seniors, but are also available to low-income individuals or people of all ages with disabilities (See Table 1). Other services offered by the City for seniors, not reflected below, include the Senior Recreation Center, fitness/recreational opportunities, and other special classes and events. Attachment A-2 provides detailed information on the social service agencies serving older adults funded by the City during FY 2006-07, the year in which the data for this report were collected.

WISE & HEALTHY AGING	 Daily Money Management Congregate Meal Program Senior Latino Club Paratransit, Education and Outreach program
MEALS ON WHEELS WEST	Home Delivered Meals
WESTSIDE CENTER FOR INDEPENDENT LIVING (WCIL)	Home Access ProgramIndependent Living Services
LEGAL AID FOUNDATION OF LOS ANGELES (LAFLA)	General Community Legal Services program
CENTER FOR THE PARTIALLY SIGHTED	Comprehensive Low Vision Services
VENICE FAMILY CLINIC	Health Care Services

Table 1: City-funded, Agency-

Provided Services for Seniors and Low-Income People with Disabilities during FY 2007-08

IV. The Identified Needs of Santa Monica Seniors



The CV 2006 study had strong senior and baby boomer components in terms of both respondents and data gathered. The largest target population of survey respondents was baby boomers, who constituted approximately 46% of all respondents; 26% of respondents were seniors and 28% were younger than baby boomers. That study, and the additional focus groups and key informant interviews conducted as part of the Senior Programs Evaluation project, provides considerable information about current Santa Monica seniors and their service needs as well as those of future seniors/ baby boomers. The baby boomer cohort is comprised of individuals born between the years of 1946 and 1964; the CV 2006 survey had a section of questions specific to older adults (those born before 1965). A total of 274 individuals completed this section of the survey of which 64% were considered baby boomers (ages 42 - 60) and 36% seniors (over the age of 60).

A. NEEDS/THEMES

Each target group included in the *CV 2006* survey gave similar ratings for the needs of current seniors; transportation and affordable housing were among the top three. Baby boomers placed health care among the top three needs for seniors while younger respondents and seniors both ranked independent living assistance among the top three needs. The needs of seniors and older individuals were rated similarly by respondents born before 1965 and those born in 1965 or after. Other highly rated needs were cultural enrichment and entertainment, caregiver services and services for homebound/persons with disabilities or homeless. The two primary themes most highlighted were increasing the accessibility of information and increasing safety.

TRANSPORTATION • Similar to senior survey respondents, senior focus group participants also perceived transportation to be a major need in the community. For example, senior participants emphasized that services such as Dial-a-Ride and taxi voucher programs were helpful but still limited in the convenience they offered, due to requiring a call in advance to make reservations or not providing assistance with carrying groceries from the vehicle to the home. The Commission also emphasized that lengthy wait lists for WISE Senior Services transportation poses an inconvenience. Senior and baby boomer participants perceived there to be an insufficient number of bus stops throughout the city to adequately meet seniors' needs and that bus platforms should be improved to facilitate boarding. Baby boomer participants also pointed out that there are no shuttle services to health providers. Particular emphasis was placed on the need to increase existing or develop new free or low-cost transportation options for seniors. For example, City Commission meetings highlighted the need to promote and expand existing transportation services to seniors especially during evening hours and to focus on increasing alternate modes of transportation, providing more taxi vouchers, and including more door to door services.

AFFORDABLE HOUSING • Senior focus group participants also indicated significant concern over the perceived lack of affordable housing. One explained, "There is a five-year waiting list [for senior housing]. This is a growing crisis." They also pointed out the need for increased rent control and for increasing the size of senior housing living spaces, which were described as "closet-like." Key informants noted that affordable housing is a particular concern since so many seniors are not financially prepared to retire and will eventually face financial challenges. A lack of affordable housing will make retirement even more daunting for seniors. These financial challenges will lead some lower-income seniors to stay in their jobs longer than they would like because of the financial consequences of leaving their jobs. Baby boomer focus group participants also considered affordable housing to be a need although this was considered to be a need for all residents, not just for seniors.

INDEPENDENT LIVING ASSISTANCE • Since baby boomers do not have as many children as past generations, they will not likely be able to count on them as much for assistance as they age. Thus, the type of assistance that children have traditionally provided to their aging parents will increasingly have to be provided by communities. Many senior and baby boomer focus group participants emphasized the importance of independent living assistance, which included increasing the provision of a range of services and ensuring ease of access to locations of interest. Suggestions included increasing the availability of health and fitness activities, assistance with getting groceries home, and assistance with doing the laundry, as well as increasing the accessibility of parks, markets, shopping outlets, and other places of interest. Current seniors and baby boomers alike highlighted the importance of older seniors being able to access services within walking distance of their homes.

The accessibility of information, legal, and financial services is also an essential component of independent living assistance. One baby boomer participant noted, "The City needs to ensure we can age in our own homes - help with money management, educate [seniors] on financial abuse and victimization." Senior focus group participants shared the same sentiment. Many desired increased accessibility to information about financial aid and management services and assistance with their taxes. One senior participant noted, "The City should provide a live call-in session during its televised finance program." Additional concerns included the need for legal services and fraud protection - against computer fraud and targeting by telemarketers, for example.

CARGIVER SERVICES • National trends show that baby boomers, today's "sandwich generation," are likely to face the continued informal care-giving responsibilities for elderly parents and the new responsibility of caring for an ailing spouse. Baby boomer focus group participants highlighted such concerns and felt that more assistance is needed for those who are acting as caregivers for their aging parents.

Another important issue is the need to increase the availability of case management services in the City for both elderly seniors and their adult children. One key informant pointed out that this is an especially valuable service for adult children who reside outside of the City, but have elderly parents in the city. Because baby boomers are continuing to work later in life, they have limited time to familiarize themselves with their parents' local service providers and need to be able to handle their parents' affairs (e.g., legal and health services) in the event of an emergency. The informant noted that both WISE Senior Services and the Center for Healthy Aging provide this type of service, which will likely become increasingly important in the next several years as children of elderly parents move to other more affordable locations outside of Santa Monica.

HEALTHCARE • Senior and baby boomer focus group participants highlighted health and nutrition information and education about Medicare and prescription drug programs as important needs. Suggestions were made for prevention programs and presentations on diabetes, education on Alzheimer's, high blood pressure, and cancer. Baby boomer participants also suggested educational programs about the relationship between diet, exercise, diabetes and health in general. Senior participants highlighted education about prescription drug interaction and information about the availability of mental health services. Baby boomer participants also mentioned implementing mobile healthcare services such as eye care or free screenings/mammograms. Many senior and baby boomer participants expressed concern for increasing efforts to improve the overall quality of life of home-bound seniors, who most considered to suffer neglect and isolation.

CULTURAL ENRICHMENT AND ENTERTAINMENT • Opportunities for cultural enrichment and entertainment were important to many senior and baby boomer focus group participants. Many expressed interest in various fitness and health activities such as yoga, Tai Chi, hiking and field trips. Inter-cultural activities, nutrition, and dance classes were also mentioned. Intergenerational programming was considered particularly important to enhancing the engagement of seniors in their communities. Senior and baby boomer focus group participants highlighted the value of social or educational programs that increase the chances for current older seniors to remain involved with members of younger generations.

Previous research on residents' perceptions of the arts conducted by the City in 2006 highlighted that the art and cultural activities are considered to be very important in improving the quality of life, providing positive alternatives for at-risk youth and in making the City a better place to raise kids. When discussing the more active, upcoming senior population, baby boomer participants and most key informants exhibited clear preferences for cultural and recreational programs that are inclusive of individuals of all ages and provided at locations and venues throughout the City. As one baby boomer focus group participant noted,

"Keep different generations together: Provide services in a way to keep everyone connected to the community—something like the Main Library—for all ages with all kinds of activities and meeting places; use SMC college for community use—all kinds of space and potential for activities."

SENIORS WHO ARE HOMEBOUND, HAVE A DISABILITY, OR ARE HOMELESS

Many senior and baby boomer focus group participants and key informants emphasized that the current amount of resources targeting services for homebound seniors is inadequate. These more frail seniors are generally isolated from the community and as a consequence often suffer a low quality of life or even neglect and abuse by care-takers. Senior focus group participants emphasized the need for advocates who would ensure a higher quality of care for this population and help reduce the frequency of elder abuse.

Some senior focus group participants also expressed that services targeting the City's growing homeless population are inadequate and that there are increasing numbers of seniors, particularly those with disabilities, among that population. A recent evaluation of the continuum of services for homeless individuals sponsored by the City supports this perception. The study's findings highlight that members of Santa Monica's elderly population are finding themselves as at-risk of homelessness, with significant numbers actually becoming homeless. In addition, the study determined that individuals in Santa Monica age 65 and older are twice as likely to become homeless than older adults in other communities. At least 15% of homeless people in Santa Monica are age 55 and older, with the oldest being 88 years of age.

The Commission for the Senior Community highlighted the need for more free and low-cost health and mental health services for seniors, as well as more case management services that ensure seniors access the range of services they need. Key informants pointed out that many older adults are resistant to mental health services, and specialized outreach is needed, in addition to educational opportunities about a range of mental health and health topics and services. Some also emphasized the need to improve mental health services for older adults. One pointed out that many older adults are slipping through the mental health care system because they do not meet the City's age requirements for services, despite exhibiting the same treatable symptoms as eligible seniors. The informant pointed out, "We currently draw the line at 60, but older adults are beginning to develop impairment issues much earlier." One concern, she perceived, for which the Los Angeles County as a whole is currently not prepared is that as the population ages many co-occurring cognitive disorders are emerging in the population due to the long-term effects of substance abuse. The informant noted, "These people [e.g., baby boomers] grew up in a different time. There was a lot more experimentation with drugs and we are only starting to see the long-term effects of this."

This key informant also explained that there is a need to improve the accessibility to mental health service information, for example, by hiring more systems navigators with expertise in working with older adults. She said, "More opportunities should be provided for cross training of professional and paraprofessional staff in using the County's Department of Mental Health field assessment protocols. This would provide a basis for conversation among staff at referring agencies or organizations and clinicians."

ACCESSIBILITY OF INFORMATION • The need to increase both the amount and accessibility of information about existing services in general was a concern mentioned by senior and baby boomer focus group participants. Many indicated that they would not know where to look for information about activities or services in the City. According to one key informant,

"There are lots of resources, but individuals do not always know how to find them. It would be helpful if there was a central line with a case worker to help direct and guide callers to services."

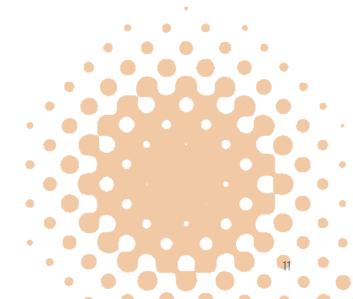
> Some baby boomer focus group participants favored providing seniors a simple single number to call for basic services because "many have difficulty dialing long numbers." The Commission for the Senior Community also recommended the establishment of a hotline with a case manager available during business hours. The Commission and focus group participants also expressed special concern for seniors who would be first time users of services, as they tend to have a difficult time accessing the services they need. Many seniors need to seek out social services for the first time when they are in their 70s and 80s, and the task can be quite daunting.

> The most common information sources either accessed or preferred by seniors were fliers and presentations at churches, television (Channel 16: the City

of Santa Monica cable channel, CityTV, and Spanish-language channels channels: 34, 52, and 22) and radio (KCRW), newspapers (Santa Monica Daily Press; Argonaut; LA Weekly; LA Times; Daily Breeze, and La Opinion), the Senior Center Newsletter, the public library, bus stops, and grocery stores, pharmacies and other venues that seniors tend to frequent. The Commission for the Senior Community also recommended that CityTV be accessible to all seniors in the City and for it to increase programming for seniors, including interactive, call-in questionand-answer shows.

SAFETY • Senior and baby boomer focus group participants considered it important to improve safety for seniors in public places. They felt that current seniors tend not to access services in crowded places or during the evening hours. Many senior and baby boomer participants also expressed feeling unsafe due to the prevalence of homeless individuals on the street near places they frequent. Another issue related to safety that baby boomer focus group participants considered important was that emergency response personnel have an updated directory of home-bound and persons with disabilities in order to locate them in the event of an emergency or disaster.

Many senior focus group participants also expressed having difficulty getting around their neighborhoods due to the poor conditions of sidewalks. The Commission recommended that the City focus on enhancing pedestrian safety and improving facility accessibility accommodations for persons with disabilities, including the construction of safe and accessible pathways in parks and sidewalks and improved sidewalk repairs. They also recommended that the effort include improving the City's system for informing residents about poor sidewalk conditions. Senior focus group participants and the Commission also highlighted that signal timing should be increased and that voice warning devices should be included at all signals in the City.



V. The Quality of Current Services for Santa Monica Seniors



This section is a general exposition of the perceived quality of senior services and programs in Santa Monica, as experienced by participating senior service consumers, selected providers and a number of other knowledgeable persons. It is not intended to be a systematic program-by-program evaluation; instead, it is a reflection of stakeholder perceptions that highlight the extent of satisfaction with important program elements. For specific program detail of the City-funded programs listed in Section III B see Attachment A-2.

A. PERCEPTIONS OF PROGRAM QUALITY

Specific questions in the *CV 2006* survey addressed the experiences clients/consumers had when receiving services. Overall, (84%) were either satisfied or very satisfied with programs, and City-funded programs for older adults were among those that received the highest average satisfaction rating; 70% of respondents, for example, indicated being very satisfied with the City's senior programs and they received an average rating of 3.5 on a 4 point satisfaction scale.

When asked to rate common barriers to services, slightly more than one-half (51%) of respondents indicated that they did not know where to access services. More than a quarter reported that long waits to talk to someone on the phone or to get services impeded their access. In addition nearly 8% reported that they were unable to make an appointment.

Focus group participants and key informants who are current providers of services in Santa Monica were not able to provide highly detailed information about program quality or examples of measured impacts or outcomes, and local expert key informants pointed out that to-date few resources have actually been dedicated to measuring and documenting specific impacts/outcomes of senior programs. One such informant noted,

"WISE has never mounted an evaluation by an external evaluator but it is coming. In the past, the City of Santa Monica analyst reviews our policies and procedures, staffing and outcomes as documented in our care plan. Internally every case is reviewed by a supervisor and care manager before closing the case."

However, key informant and focus group perceptions on the quality of program and service delivery at the very least add valuable content, context and texture to the ongoing, vital discussion of how services and programs for Santa Monica's older adults can be responsive to current and changing needs and opportunities.

Key informants and focus group participants highlighted programs and services that they considered to be of particularly high quality. The programs

and services most often mentioned were those offered by WISE & Healthy Aging (until a recent merge, two separate agencies: WISE Senior Services and Center for Healthy Aging). This service center was favored because it offers the widest variety of services and successfully combines those services with interesting and engaging activities. As one focus group participant explained,

"The Center for Healthy Aging has so many great workshops and lectures for any ailment or condition you might have. They can teach you how to live alone and get you lots of support services to get by. Everything you could possibly need is there."

WISE & Healthy Aging offers services that were considered by key informants and many focus group participants likely to meet the diversity of needs and quality expectations of the upcoming generation of seniors. The following are some examples:

- Information and referral services
- Managed care for those with elderly or disabled parents
- Financial and tax assistance
- Nursing home advocacy and elder abuse prevention services
- Transportation services
- Retired volunteer placement that matches appropriate skills and interests to work
- A variety of offsite educational opportunities and activities

According to focus group participants and expert key informants, traditional senior centers, which often tend to have a recreational focus, are not likely to appeal to aging baby boomers, and, in fact, City staff report a steady decline in attendance at the City's Senior Recreation Center and congregate meal sites. However, focus group participants and key informants also noted that multi-service providers do offer potential advantages. For instance, providers such as WISE Senior Services and the Center for Healthy Aging provide services that seem to appeal to a broad range of older adults.

Best practices literature highlights that the most successful centers for current seniors are those that provide comprehensive, well-coordinated programming, and are essentially one-stop centers, which are advantageous for seniors who can not drive or get around easily. These centers often provide transportation to and from the home to the center and offer extensive social services, case management, enrichment classes and recreational activities, link to a college or university for a range of classes provided on-site at the center, provide health screenings, medical services, legal services and counseling. As multipurpose centers, they effectively combine the recreational and socialization opportunities that tend to appeal to relatively affluent, better educated and socially active, older seniors with the financial assistance, case management, nutrition, and referral services that are critical to less affluent and frailer elderly seniors.

Overall, however, there were differing opinions among key informants, as well as focus group participants about whether or not services in Santa Monica should be provided from a single location, at least with respect to social services. One key informant, for example, felt that the utilization of multiple, neighborhood-based, one-stop facilities would be an excellent way to deliver services. According to the informant, "Santa Monica once had such a facility that offered a food pantry, legal aid, housing assistance, homeless services and other programs." This informant felt that a central location, if not a single building, is particularly useful as seniors begin to drive less. Information and referral as well as social services were widely perceived to be most effective if centralized from a single location or contact, while other services (educational, cultural, health, fitness, etc.) were generally desired to be more integrated throughout the City. Key informants and senior and baby boomer focus group participants generally perceived one-stop service centers to be advantageous to older, less mobile seniors, while recreation and cultural activities were perceived to be more appealing if integrated throughout the City and were not necessarily only for older adults.

Despite the differences of opinion regarding the value of one-stop centers or service integration throughout the City, there was widespread agreement that more traditional programs such as free and low-cost meals or on-site, seniorsfocused recreational activities will offer little value to increasing numbers of financially independent, physically active, and socially engaged seniors. More progressive best practices programs have generated updated approaches to meal programs for older adults. For example, a congregate meal program run through St. Barnabus Senior Programs in central Los Angeles utilizes local ethnic restaurants as certified food vendors for their Senior Nutrition Lunch Program. These restaurants were chosen to participate in the program because they serve food that matches the ethnic makeup of the community and serve dishes that people in the community tend to prefer. The use of these local restaurants also facilitates bringing together seniors from different ethnic backgrounds in a social setting and permits older adults to visit different restaurants spread across the community throughout the week as they prefer.

Key informants and focus group participants alike agreed that ongoing personal development is becoming increasingly important to older adults. Key informants agreed that as baby boomers age, they will seek out opportunities for personal and professional development. As one key informant noted, "The Senior Center is not attractive to many current seniors and most likely not to future seniors as many regard it as too run down and some would prefer to see a higher end facility in which to take computer classes, sessions on financial planning, etc." Another key informant pointed out that low-income seniors, in particular, increasingly need to continue working but having to upgrade their professional skills to do so, "Employment is an increasing need among low-income seniors. Community colleges and adult schools are critical resources for teaching employment skills." Many focus group participants considered attending these institutions to be an appealing option.

One indication of perceived quality is to note the services within Santa Monica that senior focus group participants indicated accessing regularly. However, these results should be interpreted with caution as most of the participants in the Senior Programs Evaluation project were also WISE & Healthy Aging (also known as WISE Senior Services and Center for Healthy Aging prior to the merge that took place after these data were collected) and Senior Recreation Center participants. Given that WISE & Healthy Aging is the largest senior service provider in the City, it is not surprising that a majority of participants would have accessed their services. Nevertheless, participants indicated that they most frequently accessed and reported a high level of satisfaction with services at the following locations:

- WISE & Healthy Aging
- Santa Monica YWCA (not a City-funded agency)
- City of Santa Monica Swim Center
- City of Santa Monica Senior Recreation Center

In addition, focus group participants also mentioned having accessed services in nearby cities at such facilities as the Mar Vista/Palms Center, Culver City Community Center and the Culver Center.

B. EFFECTIVENESS OF PROGRAM COLLABORATION AND COORDINATION OF SERVICES

Information from various sources indicates that the achievement of effective collaboration among social service providers in the City is a constant challenge. It appears that an adequate social service provider infrastructure exists within the City, but coordination of services continues to occur primarily only on an informal level. Moreover, key informants were not able to provide any examples of seamless coordination of services between different service providers, for example with referrals, program, or case management services. In the opinion of one key informant, the current culture of grant funding to private programs does not promote collaboration among service providers; rather, she pointed out that organizations are forced to compete for resources and are unlikely to share valuable knowledge or resources unless incentives are provided to do so - and such incentives have been lacking. Given the increasing scarcity of resources to

address major social needs, without collaboration organizations on their own can not succeed. As another key informant noted,

"Agencies are 'dead in the water' if they do not collaborate. MOUs [memoranda of understanding] are meaningless without personal interaction with others. Without collaboration, we wouldn't get services delivered."

> There do, however, appear to be signs that a culture of collaboration is emerging. According to another key informant, funders are increasingly interested in the synergy that results from organizations working together. Two key informants pointed out that the City's Lifelong Learning Older Adult Task Force, which is part of the Lifelong Learning Community Project, has worked to improve collaboration and has achieved a certain, but limited measure of success, especially in the area of transportation. The Task Force specifically functions to facilitate collaboration and the efficient use of resources between major public and private institutions within the City, including schools and colleges, the healthcare establishment, the City government, and residents. Approximately 22 organizations comprise the Task Force, which holds meetings on a monthly basis.

Another key informant noted that WISE & Healthy Aging coordinates a county-wide task force, one of the first of its kind, on fiduciary abuse. WISE & Healthy Aging also conducts a large number of cross-agency referrals, including referrals to a program funded by St. John's Hospital that provides in-home care management.

VI. The Emerging Needs of Baby Boomers in Santa Monica



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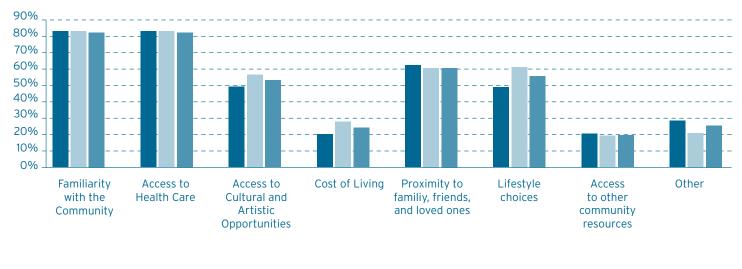
According to U. S. Census 2005 American Community Survey estimates, adults aged 45 to 64 comprise 30% of the total population of Santa Monica. These individuals are highly educated, as 85% have had at least some college education. The education level of baby boomers in Santa Monica will have

great impact on their expectations and needs in later years.

A. LOOKING TOWARDS RETIREMENT

In the *Community Voices 2006* survey respondents were asked a series of questions regarding their expectations about retirement. The findings of the survey are highly consistent with other research on baby boomers' expectations as well as those articulated by baby boomer focus group participants. Most baby boomers plan to remain in Santa Monica when they retire. The overwhelming majority of seniors and baby boomers who planned to remain in Santa Monica after retirement gave familiarity with the community, proximity to family, friends, and loved ones, access to cultural and artistic opportunities, and access to health care as reasons to remain. (see Figure 1).

Seniors and baby boomer respondents who planned to leave Santa Monica after retiring indicated that the cost of living (60%) was a factor that influenced their decision to leave. The strongest other factor influencing their intention to leave when they retire was proximity to family, friends, and loved ones.

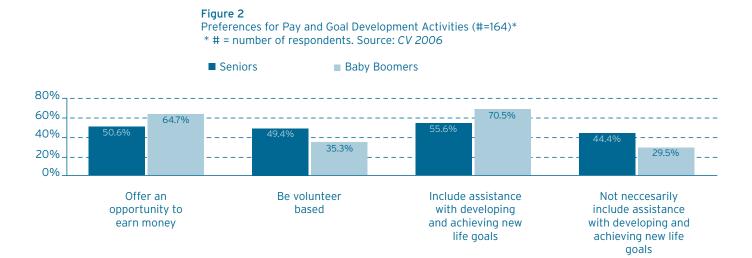


Seniors
Baby Boomers

Overall

Figure 1

Factors Affecting Decision to Remain in Santa Monica after Retirement (# = 262)* * # = number of respondents. Source: *CV 2006*



B. MAIN CONCERNS ABOUT FUTURE

Respondents born before 1965 were asked what their main concerns were about their future and/or retirement. Most indicated that their health (69%) and financial security (66%) were main concerns. Other significant concerns included maintaining lifestyle and/or level of activity (56%) and housing (41%). These concerns were generally the same for respondents regardless of whether they planned to remain in or leave Santa Monica after they retire.

The majority of respondents preferred opportunities to earn money as they aged and nearly two-thirds were interested in developing and achieving new goals. Interestingly, nearly equal proportions (50%) of senior respondents reported a desire to earn money and a desire to volunteer, compared to baby boomers, who disproportionately preferred earning money (64.7%) to volunteering (35.3%) (See Figure 2) - consistent with national trends.

A partial explanation for baby boomers' desire to continue working later into life is reflected in their concerns about the future compared to current seniors. When comparing the responses of seniors and baby boomers on concerns about the future, important differences were noted. Seniors indicated the highest levels of concern about health, transportation and access to resources, while baby boomers indicated the highest levels of concern about financial security, housing and caring for older relatives. Thus, baby boomers appear to be keenly aware that they will have to rely on their own means for security in the future, as well as face the financial pressures of the "sandwich generation." (See Figure 3).

Baby boomer focus group participants' concerns about their futures were similar to those of survey respondents, and included transportation services, access to other services that would facilitate their ability to live independently, affordable housing, having meaningful work, ability to obtain career counseling and job training for career changes, health/nutrition and caregiver support.

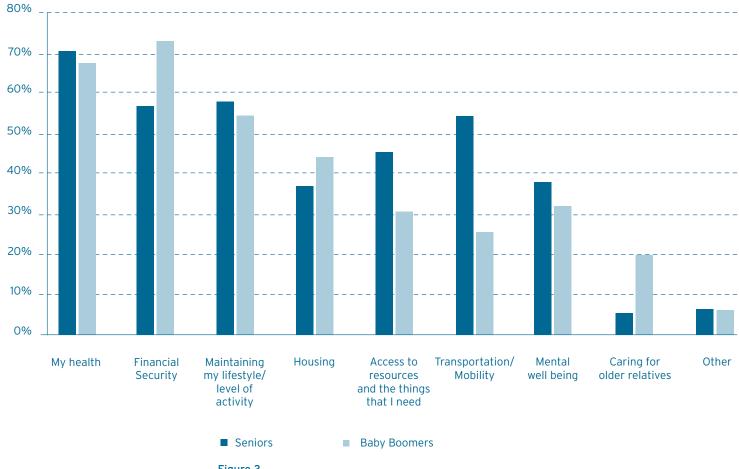


Figure 3

Resident Concerns about Future after Retirement (# = 274)*

* # = number of respondents. Source: CV 2006

Respondents born before 1965 were also asked who they would rely on for assistance as they grow older. One-third reported that they expected to rely on themselves and one-fifth their partner or spouse. Children were also considered sources of support by nearly one-fifth of the respondents. Just over a quarter expected to rely on other family members or friends.

VII. Relevance of Current Programs to Future Seniors



Three overarching themes were notable in focus group discussions and key informant interviews about the relevance of current programs to future seniors in general: (1) Relevance of current programs and the system of services to baby boomers' needs, (2) Ethnic and financial diversity of baby boomers as they age, and (3) Recognizing the resources that baby boomers bring to the table.

A. RELEVANCE OF CURRENT PROGRAMMING

The majority of key informants and focus group participants perceived that many types of programs currently offered to seniors would neither be appealing to nor appropriate for upcoming seniors. One reason for this, as emphasized by multiple key informants and focus group participants, was that upcoming seniors will not require services until much later in life than the current generation of seniors. There was widespread agreement that today's baby boomers are much more active and concerned with healthy lifestyles than current older seniors were at a comparative period in life. Another reason, on which there was equally widespread agreement, was that baby boomers possess highly varied, sophisticated tastes, which will pose serious challenges to any entity that seeks to provide a one size fits all approach to service delivery. As one key informant noted,

"All senior centers are challenged to develop services that appeal to boomers. They [baby boomers] just don't want to be associated with senior centers. Everyone is poised for creativity, trying to understand what they [baby boomers] will want. Technology will be vital--'Wi Fi' [for example]. They already have the same expectations for mom and dad." Another explained,

"The current boomer population is a significant challenge in the short term. Newcomers have more wealth with different needs. As they age in place, they will want services, but will only be attracted to upscale facilities in quality locations more like the areas in which they currently reside."

Focus group participants and key informants generally perceived, for example, that the current recreation programs offered by the Santa Monica Senior Recreation Center tend to isolate seniors from the rest of the community and thus are in need of updated programming that maintains their connection with people of a variety of ages. They also felt that the typical activities provided at the Center are not going to appeal to the more sophisticated interests of the City's babyboomers as they age.

Additionally, baby boomer program interests tend to gravitate towards lifelong learning endeavors, community college and university courses, travel, the arts, and other self-fulfilling activities for which they will be willing to pay. This is provided, of course, the quality of the experience meets expectations. This is consistent with other research on the preferences of upcoming seniors. One key informant pointed out the need to develop services for those who have resided in the city for a long time, who "may be equity rich, but cash poor." This informant felt that programs such as a reverse mortgage program might be useful. All indications are that as funding for senior services and human services in general becomes increasingly constrained, developing programs and services of a quality for which people are willing to pay is imperative. A key informant explained how his organization is trying to address the challenges posed by limited funding, the need to plan for future program changes, and being obligated to continue providing services to those currently in their care:

"The organization is looking at strategies to generate revenue, such as fee for service or marketing services to pre-retirement boomers - pre-retirement counseling, dealing with the stressors of the 'sandwich generation,' etc. One option might be to offer brown bag lunches at local corporations to those who are planning for retirement and/or serve as caregivers for their parents."

Another service area of increasing importance, according to key informants, is the provision of targeted employment services. One noted that this is a significant problem area in Santa Monica, that vocational and transitional training services are almost non-existent, despite the high demand for these services that will increase as baby boomers continue to age. As pointed out, survey respondents, key informants, and senior and baby boomer focus group participants all agreed that as baby boomers retire, they are likely to continue to seek opportunities to work. The primary challenge, as key informants perceived it, is to develop strategies and opportunities to utilize the diverse skills and expertise of baby boomers when they retire in ways that both benefit the community and interest baby boomers. As a key informant noted,

"More seniors are looking for volunteer or part-time job opportunities and employers are looking for part-time employees. This would be a prime opportunity to explore greater coordination across agencies to leverage volunteer and employment opportunities."

The extent to which public service agencies and organizations are able to utilize the resources that baby boomers have to offer as workers or volunteers has tremendous implications for the future of human service provision in our communities. Specific examples of volunteer programs that have successfully recruited and maintained baby boomer volunteers were difficult to find largely due to the fact that there are not many successful models around. Additionally, the majority of volunteer programs lack the resources to engage in the type of evidence-based evaluations that could provide some insight into their success. Key informants highlighted some programs that have managed to maintain the interests and engagement of their baby boomer volunteers. A review of the relevant literature reveals that the Next Chapter Initiative, described later in the discussion of promising models, provides a framework for addressing effective civic engagement of baby boomers.

Key informants' perceptions of the elements that will facilitate baby boomer involvement in volunteer programs are that the programs are perceived to provide an important service or be tied to a social cause personally meaningful to the individual, that they provide opportunities for challenging and rewarding work, and that they are sufficiently interesting and engaging. A key informant pointed out:

"Boomers won't volunteer for many of the activities that seniors do today. They'll want one shot deals where they can get in, complete an activity, and get out—Habitat for Humanity or holiday help. Their work will have to be challenging and rewarding and fit in with their schedules. Many will be traveling for vacations."

> The literature suggests that baby boomers are more likely to desire engagement in short-term projects that are flexible to their scheduling needs, and tailored to their particular skill sets. This will allow them to make a valuable contribution and obtain tangible results in a relatively short amount of time. Baby boomer and current senior focus group participants also agreed that upcoming seniors will require activities that are interesting, challenging, and personally fulfilling-and are likely to expect to receive compensation for their time.

Other key informants agreed with this assessment and some indicated that they were already beginning to face these issues with their senior and older adult volunteers today. Many perceived that cities need to quickly demonstrate more creativity in designing programs for retiring baby boomers because they are typically not attracted to the traditional senior center volunteer model. One key informant who manages an adult volunteer program in Santa Monica explained that her greatest challenges were organizing activities that match the wide ranging skill levels of her volunteers and ensuring that there is minimal "down time," as any lulls in activities immediately increase their attrition rate.

B. ETHNIC AND FINANCIAL DIVERSITY OF BABY BOOMERS

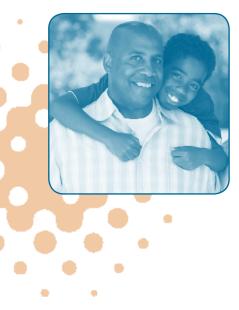
The ethnic and financial diversity of baby boomers could pose significant cost implications for Santa Monica, as the City will continue to have some income and ethnic diversity among its senior population, at least to a certain extent, despite the increasing cost of living. Most baby boomers in the City, however, are going to be financially secure enough to support themselves and prefer to work into later life. As one key informant highlighted,

"Trends impacting current and future seniors include rising housing costs, which may push seniors out of the City while those that stay are either poorer or have greater means to afford housing. This might also mean that there will be fewer seniors moving to the City."

> Local experts have noted that despite the fact that the high cost of living, the elimination of rent control and a favorable real estate market have prompted some seniors to sell their homes in the City, they are not moving out of the area completely. Many relocate to small residences in cities on the periphery of Santa Monica, which currently lack adequate services. Other key informants agreed, emphasizing that the need to improve transportation is not just for Santa Monica's seniors, but for aging populations that have had to relocate. One key informant explained that addressing the need of those who have had to relocate would require planning on a regional scale. This informant pointed out, that directing resources into regional transportation planning would be most efficient, as transportation already has existing infrastructure resources that could be adapted to coordination on a regional scale.

> Another key informant noted that there will also be an increased need for in-home services and better coordination between health care and social services to keep seniors aging in home, yet active and connected to the community.

VIII. A Refined Vision of Senior Services in Santa Monica



This section outlines a refined vision of needed services and programs for current seniors and baby boomers in Santa Monica and recommends actions toward that vision.

A. FACTORS INFLUENCING A REFINED VISION OF SENIOR SERVICE DELIVERY The nation – and the City of Santa Monica – are entering a major demographic transition that is changing the way that mature adults conceptualize and participate in what was traditionally thought of as the "golden years." With the oldest cohort of baby boomers turning 61, tens of millions of Americans are carving out a new life stage between adult midlife and old age which has been traditionally viewed as synonymous with decreasing physical well being and slowing down. This new life stage that 76 million baby boomers are now entering and defining will potentially involve a personal and community redefinition and reengagement rather than the civic withdraw and decline that traditional retirement has sometimes implied.

National research and expert analysis indicate that Americans in the second half of their life have some common aspirations for their retirement:

- Explore new options for the next stage of life
- + Learn new skills, obtain new training, and explore educational interests
- Use the skills and experience they have accumulated in flexible work or service opportunities
- Renew and create relationships with family and friends of all ages and remain connected and well integrated with their communities

The idea of retirement and aging is being re-conceptualized as a period of increasing choice or at least as a new set of choices rather than the narrowing of life options. National surveys, including a 2002 survey of Americans ages 50 to 75 conducted by the Civic Ventures nonprofit organization found (See Attachment A-3 for a list of relevant City and national reports and references), that a majority (59%) of respondents see retirement as "a time to be active and involved, to start new activities, and to set new goals." More than half (56%) said that civic engagement will be at least a fairly important part of retirement. Likewise, a survey of Santa Monica baby boomers found that two-thirds are interested in developing new goals and a majority wants to continue to earn money, mirroring national survey findings among similar age cohorts.

Baby boomers' increasing desire to stay engaged and to contribute in new ways during retirement presents novel opportunities for communities, including the City of Santa Monica to capitalize on the multitude of professional skills, knowledge, and wisdom possessed by its more experienced older residents. Nevertheless, currently, there are few institutions dedicated to harnessing this new energy. Communities and institutions that want to reap the advantages of their aging baby boomer populations are quickly adapting to the fact that baby boomers are in need of assistance in making the transition into their next phase of life which remains largely undefined. Given the findings of the *CV 2006* Survey, it is clear that in order for baby boomers who currently reside in Santa Monica to remain here, opportunities must exist to maintain an active, vibrant lifestyle, in addition to strong engagement with the community.

Given Santa Monica mature adults' concerns regarding such issues as affordable housing transportation, and cultural identity, it would be to the City's advantage to create programs, networks, and venues that make it easy for mature adults to stay engaged, continue to earn income, and stay active so that they not only remain in the City after retirement, but also increase their participation in civic life.

Planning is critical for the phase of life when baby boomers are in transition. Much like young people, who can rely on the counsel of career or vocational experts, retiring or re-careering mature adults need expert advice that goes beyond that financial realm. In spite of this need, mature adults report that they lack models and sources of information on how to plan or achieve goals for this new phase of life.

B. BEST PRACTICE MODELS RELEVANT TO UPCOMING AND CURRENT SENIOR COHORTS

Most of the general program descriptions below are directed toward the baby boomer cohort because this large group of emerging seniors will define how Santa Monica develops its programs in the long-term. Despite the fact that most of the recommendations are for baby boomers, some information on programming that may benefit older seniors is provided below.

NEW MODELS OF CENTERS FOR OLDER, MORE FRAIL SENIORS AND BABY

BOOMERS • As noted above, one-stop centers are ideal for older, frailer seniors who do not drive or cannot get around easily. The most nationally recognized and effective of these centers do not use the word "senior" in their title, do provide transportation from the senior's home to the center, offer a broad menu of social services and genuine case management in addition to enrichment classes, updated, fresh-food meals, on-site health screenings, medical services, fitness space and classes, legal services, and counseling. Research has shown that senior centers can benefit tremendously through collaboration with other clubs and community-based organizations serving the elderly to share facilities and personnel. Through the formation of such linkages, it is possible for a center to increase the number of older adults it serves, offer a greater array of services and programs that meet a greater variety of needs, avoid duplication of services, and lower costs by leveraging resources.

Creating senior centers for baby boomers is more difficult as research demonstrates that they are not attracted to the senior center model for a variety of reasons. Experts have stated that communities might have more success attracting baby boomers to senior centers by envisioning them more as "civic centers." In this spirit, more progressive senior centers have eliminated or reduced the traditional group hot meal programs and replaced them with a "café" and have a full-scale gym, a range of fitness opportunities, and technology classes and activities. As stated earlier, baby boomers are not likely to be interested in a center designated only for older adults, but some cities have had success with these newer café-style, fitness and wellness-focused centers.

Given that connections to the community are one of the primary factors that keep seniors in Santa Monica, it would be to the City's advantage to further explore the café-style center. One example from the field, which has been coined "a Starbucks for Seniors", could have particular relevance for Santa Monica given the café culture of the city and the popularity of cafés among all age groups. In Chicago, the Mather Lifeways Foundation has created venues for peer and community connections through the Mather Café Plus program. The three Chicagoarea cafés fulfill several roles as informal gathering places for mature adults. The sites include a restaurant and an educational center. The center offers programs and classes on exercise, computer skills, and art. There are also a variety of activities to encourage community building and relationships such as day trips, monthly parties, and community events. The center also provides social workers and health care professionals available for consultation and referrals. Given the abundance and popularity of cafés in the City, the adaptation of such venues for emerging seniors could have particular relevance for Santa Monica. Cafés that are located in each major neighborhood of the City would also help minimize transportation challenges.

CONTINUED, BUT TRANSFORMED EMPLOYMENT AND CIVIC ENGAGEMENT

Since baby boomers are interested in finding new careers and continuing to work in some form through very late in life, an increasing number of senior and community centers are providing classes in updating resumes, job searching, and interviewing. A comprehensive employment reorientation program for seniors is important and is still rare in communities across the nation. Hiring or retraining senior service staff members to be able to provide these services to seniors can be critical to helping retiring baby boomers reengage the community and stay active. Perhaps most critical are employment training programs for low-income seniors that might not have the skill base that other more affluent baby boomers have in terms of re-focusing their career paths. Local experts have also discussed training seniors and baby boomers to serve as peer educators on a number of

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health and social issues and to inform seniors about financial fraud.

Perhaps a more relevant approach for Santa Monica, which has a highly educated baby boomer base, is to work with and provide technical support to local agencies and corporations to develop jobs that are appropriate for and appealing to older adults or semi-retired professionals. As mentioned earlier, the Next Chapter Initiative, developed by Civic Ventures, has launched several models across the country that are promising. In particular, the Boomerz program in Scottsdale, Arizona has successfully worked with local businesses to create part-time meaningful jobs and consultation projects that meet the needs of the business while providing interesting and appropriate work for older professionals.

The Boomerz model is a community collaborative that cultivates unique and meaningful opportunities for baby boomers. It provides technical assistance to for-profit companies and non-profit agencies in developing flexible, meaningful jobs, consulting projects, and volunteer/pro-bono opportunities appropriate and attractive to baby boomers. It conducts creative outreach to bring baby boomers to specialized job fairs that include only those prospective employers who have worked with Boomerz staff and can offer flexible jobs tailored to boomers. It also provides community action opportunities and life planning and coaching tailored to specific boomer subpopulations. The program has been particularly successful in assisting boomers in re-careering to more socially and personally meaningful jobs. For instance, it has supported retired professionals such as lawyers and pharmacists to re-enter the workforce as full or part-time teachers or to use their talents in the non-profit arena.

Some of the pro-bono or community service opportunities created through *Boomerz* are project-driven and often include projects that help nonprofits formalize their internal systems. For example, the program has connected retired human resources professionals with nonprofits to develop job specs and create employee policies.

The Next Chapter of Puget Sound (NCPS) in the Seattle area recently launched a Next Chapter Initiative by bringing together numerous public and private organizations to discuss how to best meet the needs of experienced adults in the area. The goal of NCPS is to inspire people in the second half of life seeking meaningful work, service, learning and self-discovery. To this end, NCPS offers workshops, classes, seminars, one-on-one coaching, retreats, and volunteer opportunities through consortium partners that include: Antioch University Seattle, Small Business Administration–Seattle, Senior Services of Seattle/King County, Workforce Development Council of Seattle-King County, and other organizations. Additional details about setting up a Next Chapter initiative are included in Attachment A-4.

MENTAL AND PHYSICAL HEALTH & FITNESS • Compared to previous generations,

baby boomers are markedly more fitness and health conscious. Communities that seek to engage this retiring cohort will need to tailor their health and fitness activities for seniors accordingly. Some senior centers have updated their offerings in this area by including activities more appealing to seniors such as yoga, Pilates, spinning, and salsa dance classes. In some cases communities have created clubs for older baby boomers that host a large number of fitness activities as well as social and cultural events. Some of these centers offer modern fitness activities such as rock climbing and cardio kick boxing as well as dinner parties and weekend excursions. Other experts noted that health care for retiring baby boomers will be focused on prevention and alternative medicine such as acupuncture, herbal medicines, and nutrition. Local experts have also noted that mental health concerns are on the rise and currently the City does not have enough services for older adults in that area.

CULTURAL ARTS • In terms of the cultural arts, Santa Monica is fortunate in that it has a strong base from which to fashion senior programs. Consistent with what baby boomers in the City indicated they would like to see in this area in the years to come, more progressive centers across the country have begun to offer graphic arts classes, lecture series in the arts, and sculpting to appeal to younger seniors. They have also included theatrical performances, lectures and concerts, and introduced intergenerational art projects. After a long process of research and community involvement, the City of Santa Monica developed a strategic plan for the City's continued cultural development, called Creative Capital, that takes into the account the preferences of individuals of all ages. Through Creative Capital, the City will continue to be a pioneer in creating a full range of opportunities for older individuals as well as youth in experiencing arts and culture.

INTERGENERATIONAL PROGRAMMING • Another factor important to both current seniors and baby boomers in the current study was appropriate programming for intergenerational contact. Research has highlighted important benefits from intergenerational programming in terms of both maintaining sufficient community engagement and even mental health among seniors. Potential benefits include reducing feelings of loneliness and isolation, improving self-esteem, and increasing physical and mental activity. Benefits of such programming have also been found to occur among children and adolescents, for example by improving student self-esteem and achievement, and reducing negative behaviors such as drug and alcohol abuse, dropping out of school, gang involvement, and teenage pregnancy.

Civic Ventures, Temple University's Center for Intergenerational Learning and other leaders in the field of senior programming highlight the importance of intergenerational programming that is project-based and involves creative and shared problem solving. However, in order to develop intergenerational activities that are appropriate for the welfare of all participants involved and to maximize the likelihood of beneficial outcomes, key stakeholders representing the constituencies involved must come together to discuss and prioritize the needs of their communities. Communities For All Ages, a model developed by Temple University's Center for Intergenerational Learning, is one example of a potential program model that brings together stakeholders from a diverse array of organizations, community residents, and policy makers to develop and implement strategies that address the needs of children, youth, and older adults in 12 sites across the nation. The model seeks to build and strengthen communities through a three-stage process of promoting public awareness of the value of intergenerational community building, assessment of community needs and action planning, and implementation of a multi-generational strategy.

EDUCATIONAL AND EMPLOYMENT OPPORTUNITIES • Baby boomers often report that intellectual stimulation is important to them, which is clearly the case in Santa Monica with its relatively higher educated professional baby boomer population. Some cities have worked with local universities to arrange for seniors to audit regular college courses. This allows baby boomers access to courses not offered through extension programs or more traditional senior-only class offerings through community colleges. Some state and private universities give seniors the option to audit regular courses for free and offer seniors advising on what courses are most appropriate.

Community colleges across the nation are working to create new programs to serve the wave of baby boomers they expect to enroll seeking new credentialing and training for second careers. Organizations like the AARP and the Association of Community Colleges have partnered to review strategies to help community colleges better meet the needs of older adults.

Central Piedmont Community College in Charlotte, N.C. has set up the Lifetime Learning Institute dedicated to those seeking a second career. The Institute offers counseling services and career assessment programs that help older adults look at the entire life phase transition, although the focus is on career changes. In spring 2007, the college offered a program to earn accreditation to become a personal or business coach; an opportunity that would particularly appeal to aging baby boomers.

In order to attract the wave of retiring baby boomers, local colleges may consider modeling some of its course offerings after the community college described above that include more career-relevant courses that give younger seniors the opportunity to launch a second career and develop new skills. Community colleges – even those like Santa Monica College that have a senior component – will also need to find new ways of marketing their courses to retiring baby boomers and delivering their services in up-scale locations or on their college campuses.

Another option for local educational institutions could be offering instruction in caregiving as a vocation by collaborating with local service agencies. Local experts state that there is a growing shortage of paid caregivers and creating a center to generate more professionals in this area locally could benefit those Santa Monica baby boomers who will be caregivers for their elderly parents. In any case, Santa Monica has a world-class community college and a component already dedicated to seniors. This gives the City a head start in adapting its services to the new and emerging needs of retiring baby boomers.

Finally, one key informant pointed out that baby boomers who are more educated and professional, such as those that comprise a large portion of that age cohort in Santa Monica, may not be interested in community college classes or opportunities. A huge proportion of educated adults have four year college degrees and higher, and may be resistant to community college offerings, preferring instead to take advantage of learning opportunities at four year colleges. As mentioned above, Santa Monica College is a highly ranked college, and it is still unclear whether its community college status would be an issue for Santa Monica baby boomers.

INFORMATION, REFERRAL AND COUNSELING • Another way that the City of Santa Monica could leverage its natural economic strengths is through information and resource support aimed at older adults' needs and interests. As the home to some of the Internet's largest and most successful companies, the City of Santa Monica is in an advantageous position in terms of creating high quality resources online that are attuned to older adults' needs and interests. It is also a relatively small city geographically and could therefore more easily offer community forums and meetings to help mature adults with resources.

An important part of the planning process for aging baby boomers is the availability of career and life counselors and coaches. Life coaches and career counselors can help seniors navigate the many information resources available on the web and elsewhere and help seniors focus on the changes that need to be made during their transition. Although Santa Monica's Emeritus College offers seniors a wide range of courses to help with their transition, a life coach can combine many of these advisory resources in one person and can become an important guide for younger seniors making transitions.

Some local experts have recommended creating a single telephone line for accessing senior services. They also recommend informing neighborhood or community information sources - people who serve as points of contact in the community - about senior services so that opportunities for seniors are communicated more effectively through "word of mouth."

Experts have noted that City of Santa Monica's CityTV station is useful in advertising services, events and resources to the elderly, but they stress that a good website for retiring baby boomers will be vital for the future. Luckily, there 30 are already several models from the field that offer mature adults the information and counseling they need either through the Internet or through in person workshops. For example:

In Maricopa County, Arizona, Civic Ventures has launched *Boomerang* – a community project that includes a website, six centers based at libraries and community colleges, and community forums. The website is directed at helping baby boomers plan "what's next" in their life. The website serves as Boomerang's primary information source and contains links to project partners, relevant programs and services, and local, state, and national information sources for baby boomers seeking to plan and engage their next phase of life.

The models listed above are only a small sample of the emerging projects and programming more progressive communities are embracing in order to serve the baby boomer cohort now entering their senior years. These programs can certainly serve as models to others seeking to develop new ways of engaging seniors in their communities, but each individual community contains the particular knowledge regarding the type of programs that best fit their particular mature adult population. Nevertheless, there are some characteristics of senior program delivery that are more likely to make it more attractive and useful to the baby boomer retiree cohort regardless of their community.

C. PREPARING FOR THE NEW COHORT OF OLDER ADULTS: PLANNING CONSIDERATIONS

Although the potential for the City to engage its aging baby boomer population in more meaningful ways is growing, new programs based on the Next Chapter Initiative, such as the Boomerang program, require persistent, inclusive planning that may be quite different from the type of program conceptualization and implementation to which most cities are accustomed.

There are a variety of strategies for building a community vision for senior services. Models that will be most appealing to baby boomers will go beyond only a city or public provision of resources and most often rely on a wide ranging collaboration of interested stakeholders. Santa Monica's senior services agencies can serve as partners in the visioning effort, along with groups of interested stakeholders.

The first step that the City could take in this regard would be to is conduct in-depth assessments of what this cohort of older adults will want and need as they transition into their new life stage, beyond what was learned through *Community Voices 2006* and the Senior Programs Evaluation Project. This would include in-depth surveys, wide range of one-one one interviews with baby boomers, and community forums targeting this population and those that work with them.

IX. Recommendations



The City of Santa Monica, local agencies and various stakeholders should form a visioning, planning and program development team to develop a well-coordinated network of services, activities, and opportunities that will engage the City's current seniors to best help them to remain contributing members of the community while formulating long-term plans for meeting the emerging and unique needs of baby boomers. Specific recommendations to facilitate that goal are:

COMMUNITY ENGAGEMENT, EMPLOYMENT, AND LIFE-LONG LEARNING OPPORTUNITIES

- Expand opportunities for transitioning baby boomers to gain employment in the kinds of second career jobs that are interesting and challenging, ensuring they receive support in updating resumes, job searching, and interviewing. Develop comprehensive employment reorientation programs, specialized job fairs for baby boomers, and outreach and technical support to potential employers to ensure they provide job opportunities to adults 50 plus that are appealing and match their skill levels and interests;
- Expand opportunities for seniors to audit college and university courses, receive free or low-cost life planning advising, and other tailored education services. Current seniors and baby boomers expressed a strong desire to continue life-long learning and community colleges and universities have the capacity and facilities to meet those educational needs;
- Create a cadre of career and life counselors and coaches or partnerships with organizations that provide those services that have expertise in 50 plus employment and life planning issues. Life counselors and coaches are an invaluable link to existing resources throughout the community and in assisting with planning for transition into older adulthood;
- Involve senior and youth groups in planning appropriate inter-generational volunteer opportunities for seniors to remain engaged in the community. Both current seniors and baby boomers highlighted the importance of intergenerational engagement and contributing to the betterment of their communities, thus it will be increasingly important to engage relevant stakeholders in the planning and execution of these activities in order to maximize the mutual benefit of all parties involved;
- Update the system of community service opportunities in the City by offering opportunities that focus on specific social causes that have a strong personal



connection to individual baby boomers and are project-based. This should in clude a mechanism for providing technical support to nonprofit agencies to assist them in developing community service opportunities that appeal to baby boomers.

CULTURAL ARTS AND ACTIVE LIVING

- Create new, updated venues for peer and community connections. The venue needs of baby boomers are generally different from those of older seniors and need to be considered separately, yet plans for linking them will be critical. Upcoming seniors will prefer services that are more integrated into existing venues in the community, while older seniors who are more frail and less mobile will require more centralized services closer to where they reside;
- Integrate a wide range of updated senior health, recreational, and fitness related activities, such as Pilates and Spinning, into existing programs and venues throughout the City.
- Encourage both public and private venues to schedule theatrical performances, lectures and concerts at times that are convenient for older adults;
- Develop a planning committee that works with a variety of City departments, including the Cultural Affairs Division to develop the kinds of arts and public events that are appropriate for baby boomers and current seniors and that specifically have an intergenerational focus; and
- For baby boomers, consider an alternative to the traditional senior center model, such as wellness centers with a fitness focus or the Café Plus model, which have been highly successful in several communities across the country. These models are more suited to the more varied tastes and preferences of upcoming seniors;

SOCIAL SERVICES

- Update and expand transportation services for seniors. For less mobile seniors, enhance transportation (paratransit) services to include door to door services (assistance with helping seniors to their front doors or to the doors of their destination). For more frail seniors create an "door through door" companion ride program that provides a volunteer or staff person who not only accompanies the individual in a car, van or bus, but enters into the home or destination (e.g., to assist with carrying items or safely arriving to doctor appointments);
- Develop services and opportunities that not only allow older seniors to age in

place, or in their homes, but to do so in a way that keeps them engaged with and contributing to the community;

- Increase the range of support services available for those that are primary or secondary caregivers for elderly parents;
- Greatly enhance the system of social services through more intensive, coordinated social service delivery centralized at a multi-service one-stop center for older, more frail seniors that include improved case management for seniors, daily transportation service to and from the center, and the integration of cultural, gentle fitness and social opportunities;
- Develop more intensive, updated and creative outreach strategies that are specific to baby boomers, and a separate strategy for comprehensive outreach to older seniors;
- Develop a more centralized system of information about the variety of available senior services, particularly for older seniors, including a new information and referral service in order to improve and simplify access to services. The implementation of a single, three-digit numeric link, modeling after the dial 211 program, to a service hotline would greatly facilitate access;
- Increase efforts to provide technical assistance to senior service providers to develop indicators and outcome measures for program evaluation;
- Enhance the tailoring of older adult programming to meet the needs of specific subgroups of the current and upcoming senior population (e.g., active, lowincome, financially secure, Limited English Proficient immigrant, retired, and those seeking employment);
- Coordinate collaborative strategic planning efforts with providers of senior services and providers of homeless services in Santa Monica to design new programs that protect seniors from becoming homeless; and
- Replace traditional congregate meal programs with more updated options, including salad and sandwich bars offering healthy, fresh food prepared on-site and/or establishing specific restaurants in the City as sites for which pre-paid meal cards can be used.

PLANNING

- Engage a diverse group of constituents in service planning including service providers, City staff, current service consumers and future consumers. The persistent, inclusive planning required for programming that will stay current with the needs of aging baby boomers may be quite different from the type of program conceptualization and implementation to which most cities are accustomed. Santa Monica's senior services agencies should serve as partners in the visioning effort, along with other groups of interested stakeholders;
- Directing efforts towards regional planning. With some older adults moving to less expensive areas on the periphery of Santa Monica that lack an adequate regional older adult service infrastructure, the demand for services in the City will likely increase and could be burdensome to the City;

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ATTACHMENT A-1: Community Voices 2006 and Seniors Evaluation Project Focus Group Questions

Community Voices 2006 Focus Group Survey Questions

For *Community Voices 2006*, there were three different protocols used during the focus groups; each was determined by the population being represented at the focus groups. All focus groups discussed their needs in three different program areas, including: Social Services, Fitness/Health/Recreation and Cultural and Educational Enrichment. All groups were asked the four general focus group questions. The following is a list of the questions asked at each different focus group.

General Focus Group Questions (For all focus groups)

- The following questions were asked to all participants in every focus group, they were asked to keep in mind human services needs and issues.
- 1. What are the most important community issues or needs that residents in Santa Monica face today, keeping in mind the three program areas just mentioned (Social Services, Fitness/Health/Recreation and Cultural and Educational Enrichment)?
- 2. What types of programs for City residents would meet those needs?
- 3. What are the most common barriers that City residents experience when attempting to obtain services?
- 4. Do you believe there are additional groups or populations that require particular attention from the City? If so, why?

Parents (who were mostly boomers) of Elementary Aged Children Focus Group Additional Questions

- 1. Specific to your experience as a parent, what are some of your most pressing concerns regarding childcare and after-school programming needs for your elementary aged child and/or your family, including summer and other school breaks?
- 2. From your perspective, what types of childcare and after school programs, classes and activities would you like to see the City provide for elementary aged children? Are there programs/services the City could offer to address some of the concerns you mentioned earlier? Are there aspects about programs that are especially important to you, such as pick up times, flexibility in schedule, multiculturalism, and range of activities? Be specific.

Baby Boomer Focus Group Additional Questions

- 1. What are some of your most pressing concerns and likely needs regarding your future or retirement or as you age, particularly beyond the age of 65?
- 2. When you consider the future and possible retirement, are there specific kinds of opportunities or programs you would like to see the City provide, keeping in mind the human service areas of social services (including employment and community service work), cultural and educational enrichment and fitness/ health/recreation?
- 3. Where would you like these programs and activities to be offered at a one stop shop for older adults, like at a senior community center, or more fully spread out or integrated into the community or a little of both? What kinds of locations for various activities would you recommend?
- 4. When you consider the future and possible retirement, are there specific kinds of opportunities or programs you would like to see the City provide that could meet those needs?
- 5. Are there recommendations you have for how the City should offer services for retired or older individuals? Would you like to see services offered at specific locales – like a senior center – or would you prefer that services be integrated into the community – at various locations? Would you like to see senior ser-

vices integrated into other programming or do you feel it is important for older adults to have services specifically for them?

CV 2006 Senior Focus Group Additional Questions

- 1. What about for older adults what are the most pressing issues for them in each of the three major human service areas of social services (including employment and community service), fitness/health/recreation, and cultural and educational enrichment?
- 2. How can the City go about meeting the needs of older adults in each of those program areas? In other words, from your perspective, are there additional or new programs you would you like to see the City provide for people like yourself?
- 3. If the City provided those kinds of programs, what can the City do to make it easy for older adults to find out about them and to get enrolled?

Seniors Evaluation Project Additional Questions for Current Users of Services

- 1. What kinds of human services do you currently use within the City of Santa Monica? Which agencies do you use to receive services?
- 2. How well do you feel the City or those agencies help you with the services you need? Do they do a good job or not so good job serving you or getting you what you need?
- 3. How did you find out about the services and programs provided for older adults in Santa Monica? What ways are the best ways for you to find out about different or new programs for seniors?
- 4. Are there other kinds of programs that the City or the agencies that you use could offer that would be helpful to you, educational or fun for you? Please think about all kinds of social service programs and health, recreation, education and cultural programs you feel you need when you think about this question. Are there specific things that are especially important to you, such as shuttles or rides, pick up times, flexibility in schedule, multiculturalism, and range of activities?
- 5. What do you think about what we call intergenerational programming, such as doing activities with younger adults or children how do you feel about that and what would you like to do with younger people that would be interesting? Please explain.
- 6. What are the most common barriers or difficulties that you experience when attempting to obtain services from either City programs or agencies you use?
- 7. Has it been your experience that, if a staff person who works at an agency or in a program is unable to provide you with the service or help you need, they usually try to find out who or what other agency might be able to assist you? In other words, is there a staff person or someone at any of the programs you have participated in who helps you when you need new services or are looking for new programs? Can you share some examples of this?
- 8. If you provided with assistance finding additional services, did you find that process helped you receive the assistance you need? Please explain.

ATTACHMENT A-2: Santa Monica Community Development Program FY 2006-07 Funded Programs

During the data collection phase of the research highlighted in this report, the City's Community Development Program was in its FY 2003-07 cycle. During FY 2006-07, the last year of that cycle, seven programs by three different agencies were funded by the City to provide services only to seniors. An additional five programs are funded that largely serve seniors, but are available to low-income individuals or people of all ages with disabilities.

- Total of approximately \$550,000 for human service programs targeting seniors
- Total of approximately \$666,000 to human service programs (not including City-run programs) that don't necessarily target seniors, but primarily serve them
- Total City's Community Development Program's grant funds to agencies serving exclusively or predominately seniors: \$1,416,000
- City-funded programs served approximately 5,200 Santa Monica seniors (duplicative)

CENTER FOR HEALTHY AGING

The Center is a private, community-based social service and health care agency that provides mental health, health education, and physical health services to older adults and their caregiver. In-home and Spanish speaking services are available. Served 433 Santa Monica seniors in FY 2006-07.

- The Daily Money Management Program provides bill paying, budgeting, banking, and related money management services to older adults with cognitive or physical disabilities, and representative payee services to older Santa Monica adults who are unable to manage their finances. Grant Award: \$45,357.
- The Health Care for Seniors program provides physical and mental health services to Santa Monica seniors. Services include health screening, primary medical care, health education, peer counseling (individual, group and family), in-home coordination/ caregiver services, and services targeted to Spanish speaking seniors. Grant Award: \$89,145.

MEALS ON WHEELS WEST

This organization delivers nutritious meals to homebound clients. Served 333 Santa Monica residents in FY 2006-07.

• The Home Delivered Meals program provides two home-delivered meals each day, to homebound and/or isolated Santa Monica residents. Nutritional supplements at a reduced cost are also delivered. The majority of the program recipients are seniors; all recipients have a disability. Grant Award: \$117,494.

WISE SENIOR SERVICES

This organization promotes the well-being, independence and self-esteem of the elderly through the provision of innovative support services. Served 571 Santa Monica seniors in FY 2006-07 for the first three programs listed, and an additional 2,871 seniors in the Paratransit program.

• The Care Management Program provides case management services to primarily low-income Santa Monica seniors. Services include an in-home assessment, purchase of services necessary to maintain the client in his or her home and referrals to other agencies and programs for necessary services. Grant Award: \$200,111.

- The Adult Day Care program provides adult day care to Santa Monica residents with moderate to severe dementia, including persons with Alzheimer's Disease, frail seniors, and those with mild memory loss, Parkinson's, or stroke sequelae. Services include music and art therapy, exercise, inter-generational programming, community education and caregiver support groups. Grant Award: \$126,930.
- The WISE America Reads program recruits, trains and maintains a corps of 100 senior volunteers who provide school and program based tutoring to 225 low-income children at Muir, Rogers, Edison and McKinley elementary schools, the Police Activities League and Fairview Branch Library annually. Grant Award: \$32,307.
- The Paratransit, Education and Outreach program provides outreach and education services related to transportation options for seniors and persons with disabilities. Services include intakes, monthly group classes and community education. WISE works in partnership with the Big Blue Bus. Grant Award: \$137,842.

WESTSIDE CENTER FOR INDEPENDENT LIVING (WCIL)

This organization assists people with disabilities and seniors to achieve and maintain independence. Services are provided in a non-residential environment and include advocacy, peer counseling, independent living skills, case management, information and referral, and personal assistance services. Services are provided by staff primarily comprised of people with disabilities. Served a total of 119 Santa Monica seniors in FY 2006-07.

- The Home Access Program provides home modifications, adaptive and safety equipment to low-income rent-paying residents of Santa Monica with disabilities. Grant Award: \$18,308.
- The Independent Living Services program provides comprehensive support services to Santa Monica residents with disabilities, including case management, independent living skills, personal assistants registry, benefits advocacy, housing search assistance, community advocacy, transportation assistance, and information and referral services. Grant Award: \$158,622.

LEGAL AID FOUNDATION OF LOS ANGELES (LAFLA)

This organization provides free legal services to income-qualified Santa Monica residents in tenant/landlord, family law/domestic violence, government benefits and consumer law. It operates the Domestic Violence Restraining Order Clinic located in the Santa Monica Courthouse. Served a total of 165 seniors in Santa Monica in FY 2006-07.

• The General Community Legal Services program provides counsel, information/referral advice, brief service and legal representation to residents of Santa Monica in the area of landlord-tenant, government benefits, family law and debt crisis matters to Santa Monica residents. Grant Award: \$396,322.

CENTER FOR THE PARTIALLY SIGHTED

The Center for the Partially sighted provides low vision rehabilitation programs to help maximize remaining sight. Comprehensive services include optometric evaluations and prescriptions, counseling and rehabilitation programs to promote independent living. Served a total of 28 Santa Monica seniors in FY 2006-07.

• The Comprehensive Low Vision Services program provides optometric and rehabilitative services to Santa Monica residents with vision impairments. Services include optometric exams, training with optical devices, social service referrals, and needs evaluation. Grant Award: \$10,769.

VENICE FAMILY CLINIC

The Clinic's mission is to provide comprehensive primary health care that is affordable, accessible and compassionate for people with no other access to such care. This agency served 695 Santa Monica seniors in FY 2006-07.

• The Health Care Services program provides free, comprehensive health care services for 3,000 low-income Santa Monica residents. Services include preventative care screenings, health education programs, and primary and specialty medical care. Grant Award: \$82,416.

ATTACHMENT A-3: List of Source Documents Available Through Division

City Documents*

Community Voices Surveys Community Voices 2006 Survey Spending Priorities - The \$10 Survey

Demographic Data

Community Voices 2003 Final Report City of Santa Monica Community Profile 2003 (RAND)

Reports

Community Voices 2000 Final Report Community Voices 2003 Final Report Community Voices 2006 Final Report Creative Capital: Culture, Community, Vision, 2007 Community Cultural Plan's findings from 2006 Art Survey Evaluation of City-Funded School-Based Mental Health and Support Services (2006) Evaluation of Santa Monica's Continuum of Care and Strategic Five Year Plan (2006) Resident Satisfaction Survey (2005)

Other Sources (Notes, Conversations, Focus Groups)

Community Voices Focus Groups (September 2006 - November 2006) Seniors Programs Evaluation Agency Focus Groups (September 2006 - October 2006)

External References

Angelus Plaza Residence Needs Assessment (October 1998) Community Colleges Want You by Elizabeth Olson (October 24th, 2006) Findings from 2006 Art Survey from Goodwin Simon Research The Texas Baby Boomer Survey (October 2000) Civic Ventures (2005). Blueprint for The Next Chapter. Available from http://www.civicventures.org/publications/booklets/blueprint.cfm

* For more information about these documents, please contact the Human Services Division at (310) 458-8701.

ATTACHMENT A-4: The Next Chapter Initiative

Civic Ventures' *Next Chapter* provides consultation, support and expertise to communities in developing thesystems and structures for helping people in the second half of life set and work towards goals, connect with peers, and get involved in meaningful civic engagement.

Through the *Next Chapter* initiative, cities, towns and communities create new institutional approaches that help individuals 50 plus transition to a new phase of life that is both meaningful and productive through life long learning, development, and contribution to society in four main areas:

- Life planning programs help assessing their status and strengths, exploring future possibilities, and setting goals;
- Meaningful engagement through work and service opportunities to take on public service roles, through paid work and volunteer service
- Continued learning for new directions learning options to enrich their lives and retool for new careers; and
- peer and community connections places and programs to connect with people of all ages in their community.

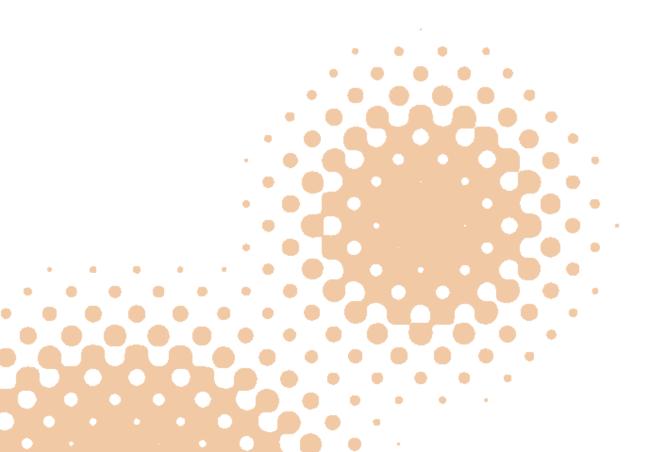
It should be noted that *Next Chapter* initiatives can include other programmatic components to be integrated into community efforts, including caregiving, health and wellness, employment, financial planning, leadership development, and technological literacy. The model is flexible and allows for tailoring to meet the needs of each unique community.

NEXT CHAPTER INITIATIVE'S 10 STEP PLANNING PROCESS

According to Civic Ventures, planning for a *Next Chapter* project is an evolving and fluid process that calls for a comprehensive community-wide approach. That approach should involve a diverse group of stakeholders, a clear sense of available community resources, opportunities and issues, and information on the needs, priorities and interests of the all older adult cohorts and subpopulations. The following include the basic 10 steps that Civic Ventures identifies as leading to successful planning, project development and early implementation:*

- **1. Create your Next Chapter vision**, making sure that it is a shared vision that incorporates The Next Chapter core components into your own community
- **2. Develop leadership for The Next Chapter,** enlisting a wide variety of community leaders as champions and spokespersons.
- **3. Deepen your community knowledge and understanding**, learning about assets and issues that already exist in your community.
- 4. Involve stakeholders and secure their support, building strong community ownership and buy-in for the idea.

- **5. Engage older adults from the very beginning**, reaching out and involving your target audience, particularly baby boomers who may not access traditional or existing services.
- **6. Create your Next Chapter plan**, setting your goals and priorities and developing your plan for programs, places and activities.
- **7. Define partner roles and responsibilities**, focusing on sponsors, partners, older adults, and other individuals and organizations that will be part of implementing your plan.
- **8. Establish your Next Chapter identity**, language, and marketing approach, testing it to make sure it will resonate with your community.
- **9.** Get underway by testing and phasing in programs over time, making sure your implementation strategy builds on your strengths, allows you to pilot new ideas, and includes ways to assess your progress along the road.
- **10.Lay the foundation for long-term sustainability**, putting in place partner contributions, funder commitments, and creative revenue generation strategies that will endure and grow over time.
- * For additional information access http://www.civicventures.org



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