

# *Planning Tomorrow Today:* **Using the “Contra Costa for Every Generation” Civic Engagement Effort as a Model for Strategic Planning**

TRACY REPP

## EXECUTIVE SUMMARY

### **Background**

“Planning Tomorrow Today” is a simple yet important motto for any organization to live by. Planning today for the future provides direction and focus and can ultimately save time and resources as planning can allow for the inclusion of a broad range of perspectives over the life of the plan. Planning can provide an organization with a clear vision of where it is going and why it is important to get there.

Contra Costa County’s “Contra Costa for Every Generation” civic engagement effort illustrates how “Planning Tomorrow Today” can be implemented. With the John Muir/Mt. Diablo Community

Health Fund and the Y. & H. Soda Foundation taking the initial lead, representatives from every sector of the community were asked to come together to develop a plan to ensure that their local communities are good places to age. Their focus was “to plan for and support the communities’ aspirations to stay healthy, live independently and lead full and productive lives.”

Motivation for participating in such a movement was to address the impending needs of the aging Baby Boomers, who will be reaching the age of 65 beginning in the year 2011 and continuing through the year 2029. The county felt that by strategically planning for the needs and aspirations of the aging population, they would also be laying the groundwork to increase the quality of life for people of every age and generation.

### **Recommendations**

It is critical that we anticipate and plan for the needs of the population served by the Sonoma County Adult and Aging Programs. As identified by Contra Costa County, Sonoma County must also address the needs of the aging Baby Boomers. As the Boomers age, their sheer numbers will have a dramatic impact and could possibly strain or break the current delivery system of Adult and Aging services over the next 25 years and beyond.

Having a strategic plan will allow Sonoma County to anticipate issues in a pro-active manner before they become major problems. Reacting to issues does not allow for a well thought-out response and is not an efficient use of limited county resources.

Given how the “Contra Costa County for Every Generation” movement was born and structured, it may be extremely challenging to replicate such a civic engagement movement in Sonoma County. However, Sonoma County can look to and learn from Contra Costa’s planning principles and the challenges they faced to implement strategic plans for the Adult and Aging Programs. Our strategic plans must be inclusive of all members of the community and include partnerships with other community organizations and agencies. Through the development of a broad-based community coalition, goals and objectives can be identified that will give us the ability to ensure a high quality of life for clients of Adult and Aging programs.

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## **Introduction**

Sonoma County is currently experiencing yearly increases in the numbers of clients applying for the services provided by the Department of Human Services, Adult and Aging Division. One major factor for this increase is the aging Baby Boomer population. Baby Boomers represent 76 million people born between 1946 and 1964, the largest generation in American history. By the year 2011, the first wave will be reaching age 65. We need to expect that there will be an even greater increase in people requesting Adult and Aging services, and in greater numbers, than ever seen in the past.

There are other factors affecting the projected increase in clients for the Adult and Aging programs. They include the increased need for in-home support care and case management as an alternative to out-of-home care, the current war creating more veterans, and new laws and increased awareness and reporting of elder and dependent adult abuse.

It is particularly important that Sonoma County develop a strategic plan to address this demographic shift. The California Department of Finance population estimates show that Sonoma County has a higher proportion of people over 60 than the rest of the state. Its projections show that by 2010, 21% of Sonoma County’s population will be over 60 compared to 16% statewide.

Having a plan will pave the way for preventative, pro-active approaches to the issues surrounding the future needs of the influx of clients. Reacting to, rather than anticipating, problems takes focus away from reaching program goals and is not an efficient use of limited resources.

Each program of the Adult and Aging Division provides services to the aging community. Depen-

dent adults and the disabled communities are also served. Below is a summary of the programs of the Adult and Aging Division that will benefit from strategic planning:

- **AAA—Area Agency on Aging**

Responsible for policy, planning, funding and advocacy to address the needs of seniors (age 60 and older), adults with disabilities (age 18 and older), and family caregivers.

- **APS—Adult Protective Services**

Investigates suspected incidents of elder and dependent adult abuse, neglect or exploitation.

- **IHSS—In-Home Supportive Services**

Provides in-home care to low-income older adults and people with disabilities in order to assist clients to remain safely and independently in their homes and avoid out-of-home placement.

- **IHSS Public Authority**

Maintains a registry of screened caregivers to refer to IHSS consumers.

- **MSSP—Multi-purpose Senior Services Program**

Provides case management to Medi-Cal eligible, frail elders, age 65 and older, to prevent placement in a nursing facility while fostering independence and dignity for seniors.

- **Linkages**

Provides case management for frail elderly adults and adults with disabilities, age 18 years and older, to promote independence through arranging and coordinating services that help support individuals to remain safely at home.

- **Veterans Services**

Provides assistance and advocacy to claim state and federal benefits for veterans, their dependents, their survivors, and other eligible individuals and organizations.

▪ **PA/PG/PC—Public Administrator/  
Public Guardian/Public Conservator**

The Public Administrator (PA) investigates and may administer the estates of persons who die with no will or without an appropriate person willing or able to act as administrator. The Public Guardian (PG) or Public Conservator (PC) conducts official county investigations into conservatorship matters; acts as the legally appointed conservator for persons found by the Superior Court to be unable to properly care for themselves or their finances or who cannot resist undue influence or fraud. Such persons usually are older, frail and vulnerable adults or persons suffering from severe mental illness.

### **Background of “Contra Costa for Every Generation”**

Contra Costa County recognized the importance of planning for the future and began a civic engagement movement to anticipate the needs of their aging community. Their vision of the future is the inspiration for planning for the future of the Sonoma County Adult and Aging programs.

In 2004, the John Muir/Mt. Diablo Community Health Fund and the Y. & H. Soda Foundation asked the Contra Costa County Employment and Human Services Department (EHSD) to partner in “Contra Costa for Every Generation” or CCEG, a civic engagement movement to make Contra Costa County a “good place to age”. The foundations recognized that the increasing population of aging Baby Boomers would have a large impact on many aspects of society in the next 25 years and beyond, and planning for their impending needs must be put in place now. They understood that true social change cannot be the responsibility of a single agency or organization. Social change would take input and commitment from all members of the community, from civic leaders to non-profit organizations, from public agencies to private citizens. The goal for the foundations was to act as a catalyst for social change for the aging community, which in turn would create a better quality of life for all ages.

Grace Caliendo, President and CEO of the John Muir /Mt. Diablo Community Health Fund, and Judy Murphy, Executive Director of the Y. & H. Soda Foundation, through their years of establishing and funding new projects, identified that CCEG would need at least 3 years and require \$500,000 in funding in order to be viable. They also wanted to have people from the community lead the effort and have the leaders reflect a diverse cross-section of Contra Costa County by being comprised of various age groups, genders, ethnicities, income levels and residents from different geographic locations within the county.

This project was to be supported by the foundations through 2006 with the hope that it would transition from being led by the foundations to having the “leadership grow organically.” The idea was to have the community build on the momentum of change created by CCEG and create a future for Contra Costa County that would be a reflection of what was most important to the community and to make Contra Costa more aging-friendly.

The Community Health Fund and the Soda Foundation initially contributed \$240,000 from the Healthy Age Initiative. Additional private funding of \$128,000 came from The California Endowment and The California Wellness Foundation along with \$150,000 of public funds contributed by Contra Costa’s EHSD, making the total contributions \$518,000. The Community Health Fund provided office space for the first three years, and the Contra Costa County EHSD contributed additional in-kind contribution of staff time and resources.

The model for CCEG was developed with data gathered from a survey conducted by the AdvantAge Initiative project. The AdvantAge Initiative is a highly respected organization that helps communities across the nation identify ways to make their communities aging-friendly. A statistically valid sample of 721 Contra Costa residents over the age of 65 was interviewed in December 2004 and January 2005. The results of the survey helped CCEG identify six areas of concern to Contra Costa seniors. With the assistance of a hired facilitator, the six areas

of concerns became workgroups, then transformed into “Action-Based Initiatives” with outlined three-year goals and six-month strategic objectives in the following areas:

- Housing
- Transportation
- Health Care and Wellness
- Neighborhood Quality of Life
- Involvement in the Community
- Support Services

As of March 2007, there are approximately 120 people actively working on one of the six initiatives. They include:

- Community-based organizations;
- Senior advocates (including members of the AAA Advisory Council);
- Local politicians and/or their support staff;
- Community College District representatives;
- Business leaders;
- Service providers; and
- Private citizens.

The Contra Costa County EHSD continues to provide staffing from their AAA program, the Health Insurance Counseling and Advocacy Program (HICAP), and clerical support. Each member of the AAA staff is on at least one of the six Action-Based Initiative groups. Some of their time is paid by the county and some of their time is voluntary.

CCEG is currently facing another transition in 2007. The John Muir/Mt. Diablo Community Health Fund and the Y. & H. Soda Foundation are stepping back and handing this civic engagement movement over to the community. CCEG is in the process of applying for 501(c) (3) non-profit status and will be continuing the good work for generations to come.

## Challenges

The initial challenge was to have CCEG represent the entire population of Contra Costa County. The initial scope of the program was to include  $\frac{2}{3}$  of the county encompassing only the communities served by the John Muir Hospital Group. Since the Contra Costa County Employment and Human Services Depart-

ment provides service to all members of the county, its participation hinged on including the entire population. Ultimately the entire county was included.

Another challenge was that the initial partners were reluctant to ask for the county's involvement other than monetary; for fear that the program would be taken over and become a county project. Some of the members had a stereotypical view of the county and did not want to see, or, even more importantly, have the public perceive that CCEG as a county program. It was important that CCEG remain a product and process of the community. Having the program grow from the community and be sustained by community efforts has shown that CCEG is a successful group effort. Contra Costa County's role remains to be that of one of many partners and not that of having an ownership role.

Once the survey was completed and the six action-based initiatives were identified, the next challenge was getting the community together and translating the action initiatives into something that would be representative of the needs of the entire county. Over 400 people, consisting of a diverse cross-section of the community, geographically and demographically, came to the initial “summit” meeting. Getting their interests and points of view included in the mission, vision, and goals of the project proved challenging. It took time to meld CCEG into a program where members felt that they had an equal part in the process and that the process was meaningful and beneficial to them.

Lastly, by virtue of the title “civic engagement”, CCEG continues to face the challenges of keeping people engaged in the process, as well as involved in the next steps necessary to implement the proposed changes.

## Successes

The success of CCEG has had a lot to do with the initial leaders, Grace Caliendo and Judy Murphy. Their vision, drive, and experience allowed the CCEG movement to take shape. Their contacts within the community were invaluable in bringing people to the table and creating excitement for the ideas.

Partnering with the AdvantAge Initiative also proved to be invaluable. AdvantAge conducted the survey which produced the data that shaped the direction of the project and had processes in place for building civic engagement which was borrowed by the CCEG movement.

A huge advantage to the project is that the CCEG movement has created more interest in aging issues within the community. People who never thought of issues facing older adults in the past, such as city planners and real estate developers, have shown interest in the issues and concerns generated from the Initiative Workgroups. New faces have been seen at AAA Advisory Council meetings, and people across the county have become excited about the concepts of the social change that CCEG inspired.

The process generated around CCEG identified that in some instances there was a duplication of efforts happening across the county. Non-profit and community-based organizations that had been independently working on issues of the aging, such as access to transportation, joined forces under the CCEG umbrella. There could have been feelings by some groups that CCEG was competing with their programs; however, most groups feel that the goals of CCEG has enhanced and supported their work.

### **Implications for Sonoma County**

As with most county programs, resources to get the job done are either non-existent or strained to the maximum. Add in the inevitable increase in clients that will be requesting and receiving services over the next 25 years to the already strained county resources, and it becomes clear that a plan for this growing population will be crucial.

Our approaches should be innovative and creative and focus on both prevention and inclusion. In order to take the stress off of the programs, we need to focus on what the programs of the Adult and Aging Division can do to promote independence and dignity. This will involve coordinating the services available in the community and working in tandem with other agencies in order to maximize all of our resources.

Like what has been done in Contra Costa County, we must look to and listen to what the communities identify as their needs and incorporate solutions to address those needs into any planning we do for the Adult and Aging programs. By using the ideas that come from the community in setting the direction of our planning, we will be incorporating the spirit of the CCEG movement through the use of a grass-roots approach and not have a top-down, county-driven program approach. This was an advantage for Contra Costa in engaging other community organizations and, hopefully, will be a benefit for engaging other community organizations in Sonoma County as well.

### **INCORPORATING SONOMA COUNTY'S "LIVING LONGER, LIVING WELL" REPORT**

In 2005, the Sonoma County Area Agency on Aging (SCAAA) completed a needs assessment report, "Living Longer, Living Well", which outlined a four-year plan to address the needs of older adults, adults with disabilities, and their caregivers. It served a similar purpose as CCEG in that it was to be a plan of action.

The results of the data gathered established four goals for the AAA and the AAA Advisory Council to use as a planning tool. They are:

- Improve access to transportation;
- Increase awareness of services;
- Increase access to home and community-based services; and
- Improve access to affordable housing.

The Sonoma County Adult and Aging programs can use the data collected by the "Living Longer, Living Well" report and build on it to create "Action-Based Initiative" workgroups, as was done in the CCEG model, and become the basis for our first strategic plan. Our strategic plan could build on the momentum generated by the AAA and the AAA Advisory Council Area Plan in making the four goals identified a living reality for seniors and those living with disabilities in Sonoma County.



## Recommendation for Strategic Planning

A simple definition for strategic plan is the process of figuring out where an organization wants to go and how it is going to get there. It involves identifying the best way to respond to the circumstances of a changing environment and allows organizations the ability to assess what the most important issues are and how to prioritize resources. The definition alone suggests the need for strategic planning. Therefore, it is in the interest of the Sonoma County Human Services Director to begin strategically planning for all programs in the Sonoma County Adult and Aging Division.

The projected demographic shift facing the adult and aging population will have a profound effect on county services. Strained county resources may hamper the county's ability to prepare. We have to begin looking for ways of providing services without requiring additional financial resources. This can only happen by engaging all sectors of the community and working together to care for the aging and disabled populations. It will take the coordination of services between all agencies and organizations that provide services to these populations, and will re-shape how Sonoma County Adult and Aging programs will provide services in the future.

The main idea that we can take from the CCEG model for our strategic planning is the inclusion of all sectors of the community. Having ideas for the strategic plan come from the community re-enforces the notion that planning for the future is not the responsibility of a single agency or organization. We can adopt Contra Costa County's focus as our focus, which is to "plan for and support the communities' aspirations to stay healthy, live independently and lead full and productive lives". We can build a community-based service delivery model where the leadership is shared.

By using the Contra Costa for Every Generation model of including the community in planning for "where we are going" and partnering in the delivery of the "how we are going to get there" pieces of strategic planning, we will create a powerful, progressive, prevention-driven model to address the needs of the adult and aging community in Sonoma County.

## Acknowledgments

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I would like to thank Bob Sessler, Director of Contra Costa County Aging and Adult Services Division, who so willingly gave a very informative interview on what the CCEG process meant to the county.

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