

Martin J. O'Malley
Governor

Gloria Lawlah
Secretary



DEPARTMENT OF AGING
Choice, Independence and Dignity

Anthony G. Brown
Lt. Governor

January 10, 2008

The Honorable Governor Martin O'Malley
Governor
State House
Annapolis, MD 21401-1991

Re: Interim Report for Statewide Empowerment Zones for Seniors Commission
Required by Chapters 511 (Senate Bill 611) and 512 (House Bill 605) of the Laws
of Maryland 2007.

Dear Governor O'Malley:

We are submitting the interim report on the Statewide Empowerment Zones for
Seniors Commission required by Chapters 511 (Senate Bill 611) and 512 (House Bill
605) of the Laws of Maryland 2007.

If you have any questions, please contact me or Stephanie A. Hull at 410-767-1107.

Sincerely,

Gloria Lawlah

Enclosure

cc: The Honorable Thomas V. Miller, Jr.
The Honorable Michael Busch
Sarah T. Albert, DLS

Maryland Department of Aging
Senior Empowerment Zones Interim Report
January 1, 2008

I. Introduction and Background

A. Legislation

Chapters 511 (Senate Bill 611) and 512 (House Bill 605) of the Laws of Maryland 2007, require the formation a Statewide Empowerment Zones for Seniors Commission (the Commission) to be chaired by the Maryland Secretary of Aging and staffed by the Maryland Department of Aging. The Commission members are to be appointed by the Secretary of Aging. The Commission is charged with recommending State financial and regulatory “incentives to provide to a community that submits a qualifying comprehensive empowerment zones for seniors plan”. Empowerment zones are designed to enhance aging-in-place services and facilitate personal independence and civic and social engagement of seniors in the community. The legislation requires the Commission to submit an interim report to the Governor and Legislature on or before January 1, 2008 and a final report on or before January 1, 2009. Attachment A is a copy of the legislation.

The legislation states that a qualifying comprehensive empowerment zone shall:

- Be developed and implemented jointly by stakeholders in a community
- Include affordable, accessible, and appropriate housing
- Include supportive community features and services
- Provide adequate mobility options
- Include evidence-based prevention strategies to reduce the incidence of disease and injury and help individuals with functional disabilities or chronic illnesses to manage their conditions
- Promote successful aging by facilitating personal independence and engaging residents in civic and social life

B. Background

The request for the report was precipitated by several factors including: the growth in the number of people in Maryland over 60 years of age in the first two decades of the 21st century. Additional impetus for the legislation comes from the following:

- Older adults overwhelmingly report that they want to grow old in their homes and communities rather than institutional settings.
- Older adults move to institutional facilities unwillingly and prematurely because they lack the resources to live at home.

- The provision of home and community-based services that enable older adults to age in place has proven to be the most cost-effective model for aging.
- One of the most challenging problems in the aging field is how to help low-to-moderate income seniors remain in their homes and community settings for as long as possible. A Naturally Occurring Retirement Community (NORC) is the term that defines communities characterized by unusually high-density older adult populations. These communities were not specifically planned as aging communities but evolved over time as residents aged.
- Maryland has many communities with large concentrations of older persons that may be considered NORCs. The NORC may be an innovative and cost-effective mechanism to serve a large number of seniors in a specific geographic area, which could make an important contribution to the state's response to the aging baby boomer dilemma and the aging in place preference of seniors.
- The AARP Public Policy Institute has defined a Livable Community for seniors as one that has affordable and appropriate housing, supportive community features and services, and adequate mobility options that when combined, facilitate personal independence and the engagement of residents in civic and social life.
- Developing a new aging-in-place model that combines the individual service focus of NORCs with the comprehensive neighborhood scope of Livable Communities will capitalize on the invaluable contributions of older Marylanders and ensure that State resources are focused in those areas where they will have the greatest impact.
- Maryland and the U. S. Administration on Aging have supported the development of two NORCs under a federal demonstration model that builds on the collaboration of strong community associations working together to develop needed services and connections to serve older people, empowering them to age in place in their community.
- This 2007 legislation will determine the feasibility of developing similar models across a diversity of aging populations, communities, and community associations.

C. Interim Report Summary

This interim report describes the work to date to appoint the Commission and to develop the work plan and timeline for a final report that will be completed on or before January 1, 2009.

II. Current Status of Work

A. Commission Formation

The Department of Aging is in the process of finalizing appointments to the Empowerment Zones for Seniors Commission. The membership will include representatives of the agencies, organizations, people, and stakeholders required by the legislation and the membership will be

representative of the geographic, racial, ethnic, cultural, and gender diversity of this State. The Commission is expected to convene its first meeting during February 2008. The Commission will meet a minimum of four times over the course of the year and will convene work groups as needed.

B. Consultant

A consultant will be retained to assist in staffing the Commission and its work groups, conducting the necessary research, exploring the feasibility of implementing the model in diverse community settings, and drafting the final report.

III. Work Plan and Timeline

The following is the 2008 work plan and timeline for completion of the final report for submission before or on January 1, 2009:

January

- Hold project kick-off meeting with consultant and Maryland Department of Aging staff.
- Plan Commission meetings.
- Begin research on best practices and legislative initiatives related to existing NORCs. Research will include: characteristics of NORCs and a description of different models; an exploration of the configuration of community associations in other communities; identification of communities in different parts of the State with diverse populations that might implement similar models for people aging in place; identification of the necessary resources needed to replicate similar models; potential funding sources; recent relevant legislation; best practices in Maryland counties and in other states; financial incentives that may be offered to establish empowerment zones; regulatory incentives needed to establish empowerment zones; components of a successful service delivery system including appropriate types of housing; types of supportive community services and providers, adequate mobility options, and disease and injury prevention strategies; and mechanisms to track results of Senior Empowerment Zones.

February/March

- Prepare meeting agenda, meeting materials, meeting notification and minutes.
- Hold the first meeting of the Commission.
- Continue researching best practices and legislative initiatives related to Senior Empowerment Zones.
- Refine the priority areas for strategic focus in the report and for the work of the Commission.

April/May

- Prepare meeting agenda, meeting materials, meeting notification and minutes.
- Hold the second Commission meeting.
- Hold any required work group meetings
- Review the results of the research.
- Discuss the contents for the future final report.

June/July/August

- Summer break for Commission meetings. No formal meetings held.
- Hold any required work group meetings.
- Provide the Commission with the first draft of the final report via email.
- Accept e-mail and telephone comments from Commissioners on the draft report.

September

- Prepare meeting agenda, meeting materials, meeting notification and minutes.
- Hold Commission meeting.
- Hold any required work group meetings.
- Review Commission's comments and suggestions for the final report.

October/November

- Finalize the report with findings and recommendations.
- Hold Commission meeting.
- Present final report to the Commission.

CHAPTER 511

(Senate Bill 611)

AN ACT concerning

Statewide Empowerment Zones for Seniors Commission

FOR the purpose of establishing the Statewide Empowerment Zones for Seniors Commission; providing for the membership of the Commission; authorizing the Commission to consult with certain individuals and entities; authorizing the Secretary of Aging to perform certain duties; requiring the Commission to make certain recommendations; providing for the requirements for a qualifying comprehensive empowerment zone for seniors plan; requiring the Department of Aging to staff the Commission; requiring the Commission to submit certain reports to the Governor and General Assembly on or before certain dates; providing that a member of the Commission may receive a certain reimbursement; ~~providing for a certain annual appropriation to the Commission;~~ providing for the termination of this Act; and generally relating to the Statewide Empowerment Zones for Seniors Commission.

BY adding to

Article – Human Services

Section 10-801 through ~~10-807~~ 10-806 to be under the new subtitle “Subtitle 8.

Statewide Empowerment Zones for Seniors Commission”

Annotated Code of Maryland

(As enacted by Chapter 3 (S.B. 6) of the Acts of the General Assembly of 2007)

Preamble

WHEREAS, In the first two decades of the 21st century, the population of Marylanders over age 60 is expected to rise by 74%, to nearly 1.4 million, according to U.S. Census Bureau estimates; and

WHEREAS, Older adults overwhelmingly report that they want to grow old in their homes and communities, rather than in institutional settings; and

WHEREAS, Many older adults move to institutional facilities unwillingly and prematurely because they lack the resources to continue to live at home; and

WHEREAS, Providing home and community-based services that enable older adults to age in place has shown to be the most cost-effective model for aging; and

WHEREAS, Maryland is home to several examples of a new aging-in-place model called Naturally Occurring Retirement Communities (NORC) Supportive Services Programs, which combine public, nonprofit, and private sector entities to provide a comprehensive array of housing, social, medical, and transportation services to help seniors age in place; and

WHEREAS, The AARP Public Policy Institute has defined a Livable Community for Seniors as one that has affordable and appropriate housing, supportive community features and services, and adequate mobility options, that when combined facilitate personal independence and the engagement of residents in civic and social life; and

WHEREAS, Developing a new aging-in-place model that combines the individual service focus of NORCs with the comprehensive neighborhood scope of Livable Communities will capitalize on the invaluable contributions of older Marylanders, while at the same time ensure that State resources are focused in those areas where they will have the greatest impact; now, therefore,

SECTION 1. BE IT ENACTED BY THE GENERAL ASSEMBLY OF MARYLAND, That the Laws of Maryland read as follows:

Article - Human Services

SUBTITLE 8. STATEWIDE EMPOWERMENT ZONES FOR SENIORS COMMISSION.

10-801.

THERE IS A STATEWIDE EMPOWERMENT ZONES FOR SENIORS COMMISSION.

10-802.

(A) THE COMMISSION CONSISTS OF THE FOLLOWING MEMBERS:

(1) ONE MEMBER OF THE SENATE OF MARYLAND, APPOINTED BY THE PRESIDENT OF THE SENATE;

(2) ONE MEMBER OF THE HOUSE OF DELEGATES, APPOINTED BY THE SPEAKER OF THE HOUSE;

(3) THE SECRETARY OF AGING, OR THE SECRETARY'S DESIGNEE;

(4) THE SECRETARY OF HEALTH AND MENTAL HYGIENE, OR THE SECRETARY'S DESIGNEE;

(5) THE SECRETARY OF HOUSING AND COMMUNITY DEVELOPMENT, OR THE SECRETARY'S DESIGNEE;

(6) THE SECRETARY OF TRANSPORTATION, OR THE SECRETARY'S DESIGNEE;

(7) THE SECRETARY OF PLANNING, OR THE SECRETARY'S DESIGNEE;

~~(7)~~ (8) ONE REPRESENTATIVE FROM LOCAL GOVERNMENT;

~~(8)~~ (9) ONE REPRESENTATIVE FROM THE MARYLAND ASSOCIATION OF AREA AGENCIES ON AGING;

~~(9)~~ (10) TWO REPRESENTATIVES FROM PROVIDERS OF SENIOR SERVICES;

~~(10)~~ (11) TWO REPRESENTATIVES FROM SENIOR ADVOCACY ORGANIZATIONS;

~~(11)~~ (12) ONE REPRESENTATIVE FROM A NEIGHBORHOOD OR COMMUNITY ORGANIZATION;

~~(12)~~ (13) ONE REPRESENTATIVE FROM A TRADE ASSOCIATION WHOSE MEMBERS PROVIDE SERVICES TO SENIORS;

~~(13)~~ (14) ONE CONSUMER MEMBER AT LEAST 60 YEARS OLD; AND

~~(14)~~ (15) ONE REPRESENTATIVE FROM AN ACADEMIC INSTITUTION WHO HAS EXPERTISE IN AGING STUDIES OR A RELATED FIELD.

(B) IN PERFORMING ITS DUTIES, THE COMMISSION MAY CONSULT WITH INDIVIDUALS AND ENTITIES THAT THE SECRETARY DEEMS APPROPRIATE.

10-803.

(A) THE SECRETARY OF AGING SHALL:

(1) CHAIR THE COMMISSION;

(2) APPOINT THE NONDESIGNATED MEMBERSHIP OF THE COMMISSION; AND

(3) ESTABLISH SUBCOMMITTEES AND APPOINT SUBCOMMITTEE CHAIRS AS NECESSARY TO FACILITATE THE WORK OF THE COMMISSION.

(B) TO THE EXTENT PRACTICABLE, THE MEMBERS APPOINTED TO THE COMMISSION SHALL REASONABLY REFLECT THE GEOGRAPHIC, RACIAL, ETHNIC, CULTURAL, AND GENDER DIVERSITY OF THIS STATE.

10-804.

(A) THE COMMISSION SHALL RECOMMEND A PLAN TO DEVELOP AN EMPOWERMENT ZONES FOR SENIORS PROGRAM IN THE STATE THAT DIRECTS FINANCIAL AND REGULATORY INCENTIVES TO LOCAL COMMUNITIES THAT DEVELOP A QUALIFYING COMPREHENSIVE EMPOWERMENT ZONE FOR SENIORS PLAN THAT IS DESIGNED TO ENHANCE AGING-IN-PLACE SERVICES AND FACILITATE THE PERSONAL INDEPENDENCE AND CIVIC AND SOCIAL ENGAGEMENT OF SENIORS IN THE COMMUNITY.

(B) A QUALIFYING COMPREHENSIVE EMPOWERMENT ZONE FOR SENIORS PLAN SHALL:

(1) BE DEVELOPED AND IMPLEMENTED JOINTLY BY STAKEHOLDERS IN A COMMUNITY, INCLUDING STATE AND LOCAL GOVERNMENTS, SENIOR HOUSING OWNERS OR MANAGERS, HEALTH PROVIDERS, NONPROFIT ELDERLY SERVICES PROVIDERS, LOCAL BUSINESSES, AND INDIVIDUAL SENIORS;

(2) INCLUDE AFFORDABLE, ACCESSIBLE, AND APPROPRIATE HOUSING;

(3) INCLUDE SUPPORTIVE COMMUNITY FEATURES AND SERVICES;

(4) PROVIDE ADEQUATE MOBILITY OPTIONS;

(5) INCLUDE EVIDENCE-BASED PREVENTION STRATEGIES TO REDUCE THE INCIDENCE OF DISEASE AND INJURY AND TO HELP INDIVIDUALS WITH FUNCTIONAL DISABILITY OR CHRONIC ILLNESSES TO MANAGE THEIR CONDITIONS; AND

(6) PROMOTE SUCCESSFUL AGING BY FACILITATING PERSONAL INDEPENDENCE AND ENGAGING RESIDENTS IN CIVIC AND SOCIAL LIFE.

(C) THE COMMISSION SHALL RECOMMEND STATE INCENTIVES TO PROVIDE TO A COMMUNITY THAT SUBMITS A QUALIFYING COMPREHENSIVE EMPOWERMENT ZONES FOR SENIORS PLAN, INCLUDING REGULATORY AND FUNDING OPTIONS.

10-805.

(A) THE DEPARTMENT SHALL PROVIDE STAFF SUPPORT TO THE COMMISSION.

(B) A MEMBER OF THE COMMISSION MAY NOT RECEIVE COMPENSATION AS A MEMBER OF THE COMMISSION, BUT IS ENTITLED TO REIMBURSEMENT FOR EXPENSES UNDER THE STANDARD STATE TRAVEL REGULATIONS, AS PROVIDED IN THE STATE BUDGET.

10-806.

THE COMMISSION SHALL REPORT ITS FINDINGS AND RECOMMENDATIONS TO THE GOVERNOR AND, SUBJECT TO § 2-1246 OF THE STATE GOVERNMENT ARTICLE, TO THE GENERAL ASSEMBLY IN AN INTERIM REPORT ON OR BEFORE JANUARY 1, 2008, AND IN A FINAL REPORT ON OR BEFORE JANUARY 1, 2009.

~~10-807.~~

~~SUBJECT TO THE AVAILABILITY OF FUNDING, FOR EACH FISCAL YEAR FOR WHICH APPROPRIATIONS ARE MADE AT LEAST \$50,000 SHALL BE USED TO FUND THE STATEWIDE EMPOWERMENT ZONES FOR SENIORS COMMISSION.~~

SECTION 2. AND BE IT FURTHER ENACTED, That this Act shall take effect ~~June~~ October 1, 2007. It shall remain effective for a period of 2 years and, at the end of ~~May 31~~ September 30, 2009, with no further action required by the General Assembly, this Act shall be abrogated and of no further force and effect.

Approved by the Governor, May 17, 2007.