



Aging: The Possibilities

Community Report
April 2009

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Acknowledgements

The work of this initiative – Aging: The Possibilities - began with individuals at a grassroots level in the belief that there is untapped potential among individuals working together. Collectively, we own a successful community. How do we contribute to this individually? What part will each of us take?

National research at Harvard and Northwestern University shows that strong relationships and ownership in a community create benefits for both the individual and the community. When people are connected, their communities have less violence, students have higher test scores, and individuals suffer fewer heart attacks and colds. Relationships create trust and ownership, and people work together to make their community a better place.

“Build connections to people. Build trust with each other. Get Involved.”

Better Together. The Report of the Saguaro Seminar: Civic Engagement in America.

Vibrant and healthy communities offer many opportunities for people to share their gifts. SCOPE’s goal is to create those opportunities. When people share their gifts – talents, skills, knowledge, abilities - with the community, they know that they matter. The need to matter and feel appreciated is fundamental to our individual and collective well-being.

We thank the community members, activists, and non-profit leaders who contributed their time, wisdom and efforts to this initiative. Over 900 individuals attended meetings, learning sessions and assemblies providing diverse insight and creative ideas to a timely topic, Aging: The Possibilities grew naturally from a myriad of gatherings and discussions. The culmination is contained in this report, designed to capture the spark and provide fuel for the future.

Our Mission

SCOPE connects and inspires citizens to create a better community.

Special thanks to the Steering Committee who helped
guide our focus as we engaged the
community on this broad topic

Aging: The Possibilities Steering Committee

Jono Miller, Co-Chair
Isabel Norton, Co-Chair
Robert Carter
Carol Poteat-Buchanan
Nancy Schlossberg
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Message from the Executive Director

When SCOPE started to bring the community together around the topic of “aging” we were not sure what direction it would take. In fact, the only sure thing was that our demographics cried out for attention. If you are reading this report you are probably aware of at least some of those demographics. The report gets into it in detail but it is clear that Sarasota County is different from any other place in the country.

With an open mind, the 800+ people studied the topic, shared their stories, and offered ideas. They came to appreciate that a rich and important conversation about aging is about everything. From style to sex, from decline to rediscovery, aging is about all the dimensions of living. Ultimately this group of hundreds envisioned how they could turn the demographic reality into a complex and potent possibility. What can we do here in this community, the demographically oldest large county in the nation that can make a difference? What can we conceive, try out and learn that can inform the rest of the country as it ages? We are decades ahead of the rest of the country as it too ages.

And the answer is that our place, this oldest large county can be the center of thinking and the laboratory for doing. We can build upon that asset that sets us apart by creating a national institute that focuses on the older adult “in” community. That is, the Institute recognizes that people age in the context of community. Older adults in naturally evolving communities engage with young people and babies. They share and can produce the successes and failures of community with everyone else. The economics and environment for healthy, happy families is essential for happy and healthy aging.

This idea, the Institute, is that “big” idea that people have been talking about for many years in the greater Sarasota County area. It has the capacity to be a significant driver of the economy. It has the capacity to attract international attention as a place of advanced and creative thinking about the structure of community in the future and the future is an older demographic around the world.

I welcome you to explore this report and to visit the SCOPE website that defines the Institute in greater detail. This is work in progress but it is gaining momentum rapidly. Starting this summer a national consulting company will begin its work to crystallize the concept, test the idea around the country and generate a sophisticated business model and business plan so that national investment can follow. Get involved with the Institute for the Ages.



Tim Dutton,
Executive Director

Foreword

Sarasota County has a unique population – almost thirty percent of our residents are over age 65. This unique demographic shapes and contributes to all aspects of our community. Since late 2004, SCOPE has worked as a convener and catalyst around the topic of Aging: The Possibilities. This initiative focuses on possibilities as a path to lead us to new thinking and action. How are we creating a community that supports people no matter what their age? How might we get better at recognizing and using the talents and skills of older adults?

In the following pages, you will read about this focus. It describes the process of the community conversations, learning opportunities, best practices, and recommended paths for our future. This report is not meant to review the many service providers and programs available in Sarasota County. It reflects the pulse and direction of the community discussions and highlights opportunities to improve our quality of life. Throughout this report are quotes from residents who participated in this initiative. Their words highlight some of the concerns for and passions about our community.

“I have been amazed to see the involvement of so many different people in this topic. I learned that traffic, transportation, and housing are uppermost in people’s minds. Also, that they resonate to the issue of “mattering” which indicates that they feel the need to be noticed and appreciated.”

- Nancy Schlossberg, Steering Committee

The first section paints a picture of our rapidly changing population. It provides the context and reasoning for choosing the topic of aging as a focus of community study. The second section reviews the conversations process that laid the foundation for the work of the initiative. The third section paints a picture of what has emerged as the key areas of focus:

- Community Awareness
- Caregiving and Supportive Services
- Neighbors and Neighborhoods
- Workforce and Economic Opportunities
- Housing and Physical Spaces
- Transportation Alternatives
- Wellness and Active Living

Each section includes a statement of what is envisioned by the community. This is a declaration of possibility, hope and the future. These statements are built from our analysis and the voice of the community and they provide a path for continued action.

Introduction

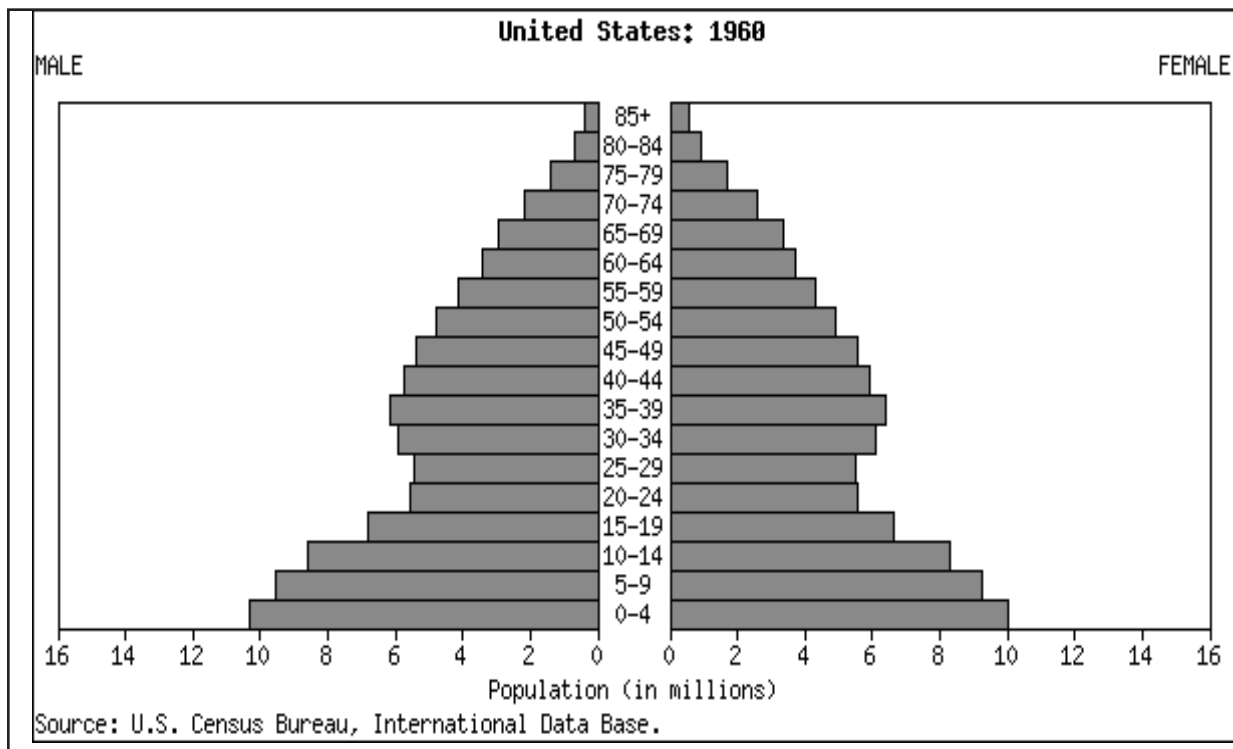
Worldwide, we are experiencing a tremendous shift in our population. Historically a majority of the world's population has been concentrated in the 40 and below age group; this will shift significantly in the coming decades. Some of these shifts include:

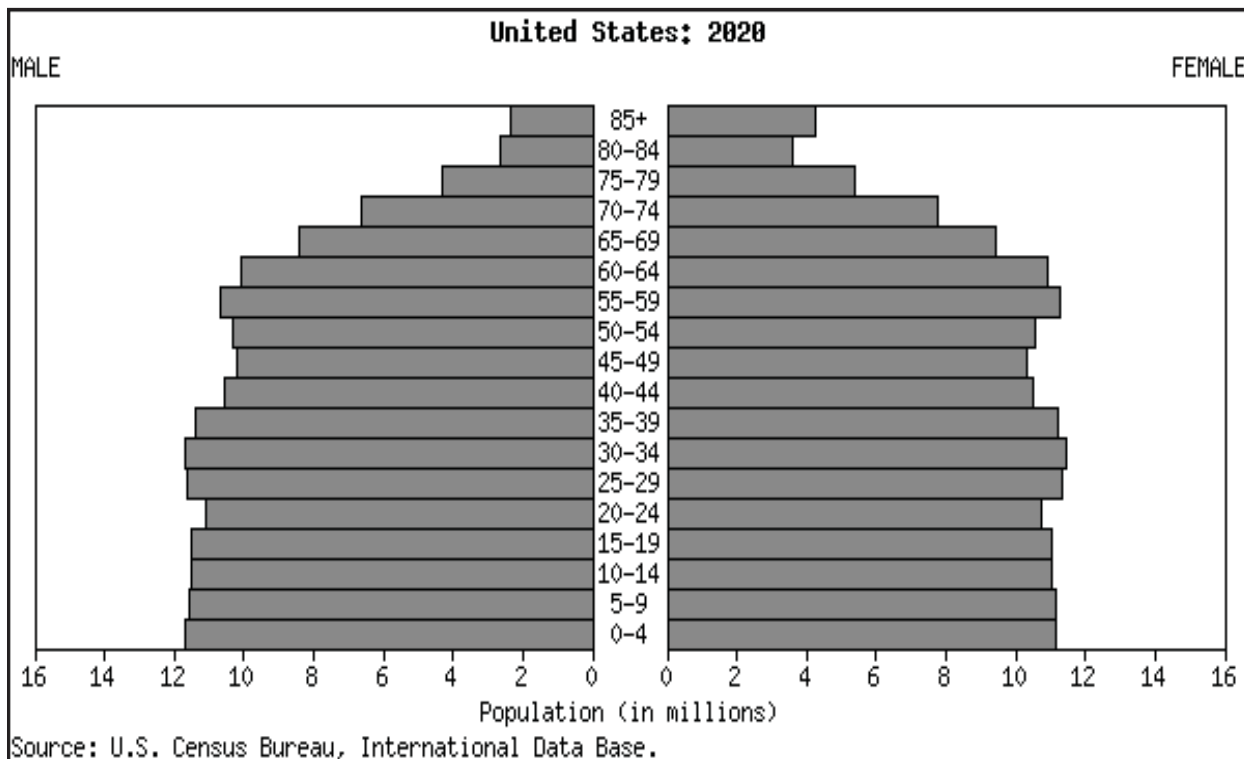
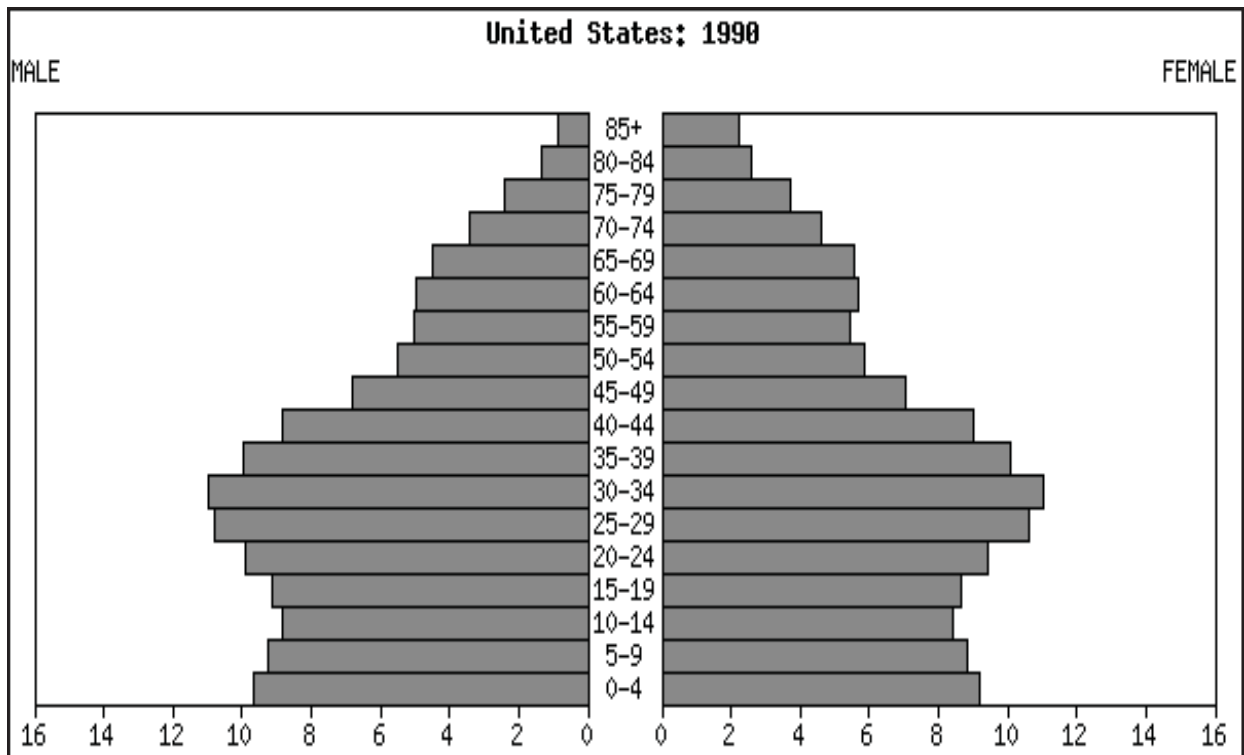
- The proportion of people age 60 and over is growing faster than any other age group.
- In 2025, there will be about 1.2 billion people over the age of 60.

At the same time, decreasing birth rates and increased longevity have caused the world's age composition, the proportion of children, young adults, middle-aged adults and older adults, to shift upward in age.

Much the same is true for the United States. Along with other countries such as, Finland, Italy, Japan and Sweden, the U.S. is among the most rapidly-aging developed nations in the world. (UNDP, Human Development Report 2005) In 2000, there were an estimated 35 million people age 65 and over in the United States, accounting for almost 13 percent of the national population.

The data suggest that this number will continue to grow, due in large part to the baby boom generation, which is the largest demographic group in our history. The graphs at left illustrate the impact of the baby boomers on the U.S. population.





U.S. Population Facts

In 2011, the baby boom generation, those born between 1946 and 1964, will begin to turn 65.

By 2030, it is projected that one in five people will be age 65 and over, reaching 70 million by that year.

Florida

Florida has a significantly larger population of older adults. While the percentage of people over age 65 is about 13 percent nationally, that number is closer to 18 percent in Florida. This makes Florida the state with the highest percentage of people over age 65 in the U.S.

Sarasota County

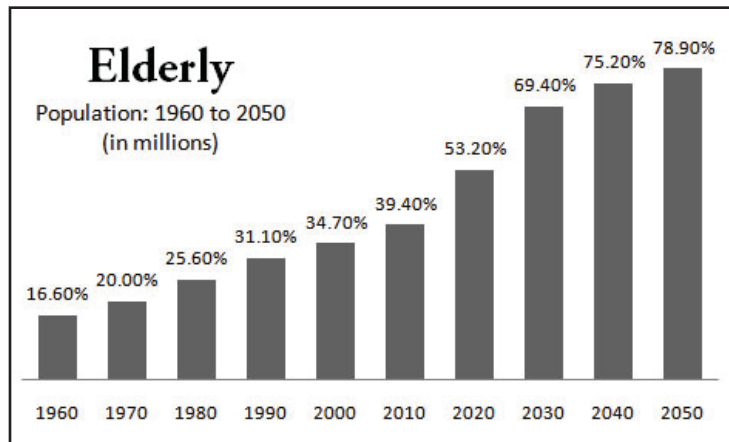
Sarasota County is well ahead of these aging trends. Nearly 30% of the population is over age 65 and 50% of all households have someone over age 65 as well. This

makes Sarasota County the oldest county with a population over 250,000 people nationally. Our neighbor to the south, Charlotte County, has the same designation for counties with less than 250,000 people.

Post-retirement has been referred to as the “bonus years,” Marc Freedman of Civic Ventures calls it the “encore years.” Regardless of the name, the fact is that people are living longer and healthier, with the desire to lead full and meaningful lives. In the U.S., those who are age 65 can expect to live well into their 80s if they don’t smoke, eat right and exercise.¹ This longevity and the boomer-related demographic shift will impact our workforce, our economy and our civic structures. Experts estimate that 90% of net assets in the U.S. are held currently by people age 40 and over.²

These demographic realities provide us with challenges and a unique opportunity. How can we maximize the talents of older adults to make important contributions to the well-being of our community? How do we create the environment and communities that allow all generations to live, work and play together in a productive and complementary fashion? How do our regulations, community planning and program decisions help make this happen?

Sarasota County is ahead of the nation and in a unique position. We are poised to develop ways to make the most of this active, older population. We are poised to transform our communities. We have the market potential to explore new products and services. Are we ready?



Source: U. S. Bureau of the Census

¹ *Turning Silver into Gold*, Mary Furlong, p 13

² *Turning Silver into Gold*, Mary Furlong, p.8 #9

Overview of Process

Aging: The Possibilities initiative has used a variety of approaches to learn from experts, ask provocative questions and stimulate new dialogue. To date over 900 people have participated.

Community Conversations and Listening Sessions

The initial discussion was based on a series of questions designed to stimulate thinking about the talents and gifts of all community members and the possibilities for Sarasota County. Some questions that inspired these conversations were:

- What gifts do elders and young people in the community have to offer?
- What possibilities can you imagine that would make Sarasota a positive place for aging?
- What doubts and reservations do you have about our community realizing its potential?

The ideas shared during these gatherings helped shape future meetings and larger community assemblies designed to explore possibilities for aging productively, comfortably and vitally in Sarasota County.

Community Assembly April 2005

The first Community Assembly on Aging provided the opportunity for community members to reflect, explore new ideas and connect to that which they felt most passionate. Over 120 community members worked in small groups and affirmed their commitment to continue to learn, work together and make Sarasota County an even better place to live.



Ideas and recommendations from this Community Assembly were reported to the Policy Committee for the 2005 White House Conference on Aging. This national conference, held every ten years, results in recommendations to the President and Congress to help guide national aging policies.

Action Teams

Action teams formed and met to learn about specific issues and explore paths of possible projects or strategies. The action teams identified opportunities for further learning and a number of professionals and experts offered their expertise on different topics. SCOPE worked with several other organizations to bring these learning opportunities to the public. (Refer to Appendices I and II.) These learning sessions helped build a foundation on which new

“Taking the time to listen to the insight of other participants; this means I was not preaching to the choir but absorbing their philosophies which did not always necessarily match mine.”

- Millie Headdy, participant

ideas could emerge. Some overlap and connections occurred and seven major themes resulted. The following overview provides the broad conclusions and direction of each theme.

Major Themes

Community Awareness

Community awareness was identified as having two distinct components:

- how we perceive those of a different age from ourselves and

- our awareness of available resources.

Age bias damages our community and impacts our ability to work together. This bias limits people's willingness to share their talents, skills and abilities. The aging process in general does not limit one's ability to remain physically, intellectually, and civically active.

A second component of community awareness is knowledge about available services and resources. Examples abound of older adults with a need, perhaps struggling to stay in their own home, and yet unaware of community resources available to help them. These resources, including information, services, and products could help improve their quality of life. Unknown resources are of little use to any of us. Our community should enhance and expand the ways that resource and service information is made available.

Caregiving & Supportive Services

Family caregivers are an integral part of our community's healthcare system. We can strengthen our systems to support caregivers and increase community awareness of the issues they face by connecting community resources to those providing care of loved ones. Resources include caregiver training, respite programs and caregiver support groups. Individuals, associations, nonprofits, businesses and government have a role to play in supporting both caregivers and older adults in Sarasota County. Our task is to define these roles and develop ways to provide that support.

Neighbors & Neighborhoods

Neighbors often come together to build relationships, share their skills to help others and make their neighborhood a better place to live. In some neighborhoods, residents have created their own informal solutions to the challenges faced by elderly neighbors living on their own. Neighbors and neighborhoods represent a resource that is largely untapped throughout Sarasota County. This grassroots work should be supported by local government, nonprofit organizations and local businesses in order to create a community that supports all generations. Simply put, neighbors should be activated to work together and uncover

their strengths and talents that can be applied to the best interests of the neighborhood. In addition, as nonprofits and local government seek to deliver programs to the community, they should strive to respond to the priorities and topics articulated by residents and local associations.

Workforce & Economic Opportunities

The demographics of Sarasota County create a living laboratory offering opportunity for market research, manufacturing and testing of services and products geared toward older adults. This context should be part of our economic development strategies in Sarasota County.

Sarasota County is rich with the untapped skills and talents of retirees, many searching for opportunities to use their skills in a meaningful way. The business community must continue to develop and employ strategies to attract and retain older employees. This applies to all sectors of business - public, for-profit and not for profit. Our community should create clear paths for older adults to identify new careers and connect with employers.

Housing & Physical Spaces

People are living longer and in better health in many instances. Quality of life is impacted by living arrangements and the ability to live independently. Throughout Sarasota County, we must develop more options for housing that address the desires and circumstances of many older adults including: affordability, functionality despite physical limitations (i.e. universal design) and shared living arrangements such as co-housing.

Form follows function and our community design must not hinder our quality of life, no matter what our age. Our community should design and develop residential areas in ways that support multiple transportation options in order to decrease isolation that occurs when one is no longer able to drive. Community land-use planning should work toward making services and social opportunities easily accessible. Land use regulations and public policy should be reviewed for impact on older adults. It should be intentionally reflective of our demographics.

Transportation Alternatives

Not unlike other communities, Sarasota County has developed in such a way that a personal automobile is essential for getting around. A community that is designed to offer a balance of transportation options (walking, bus, car) is better for all its residents. Residents who are unable to drive themselves often stay home and experience social, spiritual, and physical isolation. This isolation often has a negative impact on one's health, both physical and mental. The community and the economy also suffer as homebound residents are unable to contribute purposefully, socially or economically. As we move forward, the community must look for ways to enhance the continuum of transportation services available to those who no longer drive.

Wellness & Active Living

Wellness and active living is synonymous with a high quality of life. The Six Dimensions of Wellness (see Appendix III) create a context for developing a wide variety of programming and learning opportunities.

As an area with a large older adult population coupled with our rich cultural and creative identity, Sarasota County is the perfect place to continue to establish innovative programming focused on arts and creativity. Ideas for change include developing more places where people can learn new ways to express themselves creatively or to develop new skills and explore career and volunteer opportunities.

Conclusion

These seven themes represent the direction of the community through the Aging: The Possibilities initiative. The following pages provide more detail about what was learned, intended directions, and current community interest and activity. Writing this report was similar to taking aim at a moving target. The community interest is high, numerous individuals and organizations are developing ideas, creating new models for engaging older adults, delivering services and offering programs. The examples given are representative of what is occurring throughout Sarasota County.

Community Awareness

Community awareness was a theme that was interwoven through a variety of topics and issues. Awareness was described in two distinct ways: awareness of age bias and the inherent challenges such bias creates, and awareness of resources and services available in the community. Areas of opportunity were identified for community organizations and leadership to enhance knowledge and understanding among Sarasota County residents and institutions.

We envision a community where the aging process is viewed in a positive way, where there is broad knowledge of available services and resources.

To achieve this, individuals, organizations, government and business should:

- **Address age-bias** through public education such as workshops and lectures that debunk myths about growing older. Older adults can be a part of the texture of our community which can help to discredit much of the age-bias that is prevalent. It's imperative to educate and design messages that create a cultural shift in the way our society views aging and differences among generations.
- **Increase awareness of services** by developing new ways to disseminate information including: neighborhood-based information distribution, enhanced marketing at supermarkets, hair salons, and convenience stores and medical service providers.

What We Learned

Age Bias

Age bias or ageism is discrimination against someone because of their age.³ While this can

³ Ageism, www.webster.edu

be toward a person of any age, the term is often used to reflect prejudice against older adults. Age bias plays itself out through attitudes and behavior, and some of it is even accepted by modern culture such as popular greeting cards or humor about “old geezers.” Ageism is different from other biases because one’s age is not a static factor, we are all aging. Age stereotypes are often internalized at a young age and we may very well be biased toward a certain age group that we will eventually be part of. Such biased attitudes are in contrast to the skills, abilities and activities of older adults.⁴

Ageism may be displayed toward others or toward oneself. An ageist attitude can stymie conversation and discount the abilities of others. This prevents relationships from forming and creates barriers to participating and contributing to the community. We create limitations when we are quick to label others as “older adult,” “elder,” “retiree” and “senior citizen.” Such age bias interferes with acknowledging the gifts and talents of an individual. Ageism directed at oneself may affect self concept and negatively impact one’s health and quality of life. Longitudinal studies have shown that older adults with more positive self-perceptions of aging lived longer than those with negative self perceptions.⁵

One primary objective for our community is to work together to create a culture that embraces people of all ages. Local strategies include:

- intentional communication with people different from oneself,
- encouraging opportunities for multi-generational living and activities,
- challenging bias when encountered, and
- seeking out opportunities to interact with different generations.

How can media shift its language?

Awareness of Services

Throughout Sarasota County, there is a broad array of services and programs for older adults. However, a lack of awareness of their availability often prevents

⁴ “Combating Ageism”, Vital Aging Network www.vital-aging-network.org

⁵ “Fighting Ageism” article Melissa Dittmann, APA Online May 2003

Challenging Ageism

Challenge ageism by examining your own attitudes to people of all ages.

Be open to friendships and relationships with people across the generations.

Don’t accept a lower standard of living for older people just because they are older.

Question policies and practices which seem to stereotype older people and make them less equal in society.

Watch your ageist language, and question ageist attitudes in friends, family and colleagues.

Source: www.seniorhelpline.ie

residents from knowing what services exist or how to access them. Services cover a broad spectrum that include essential needs (meals and nutrition, housing); health and wellness (health and dental care, home health and nursing care, mental health services, health education, clinics and hospitals, exercise and fitness); independence (information and referral, caregiver support and training, transportation, legal assistance, financial counseling); and civic and community engagement (employment, volunteerism, lifelong learning, cultural and leisure activities, faith-based organizations). Often, people do not connect with those services that may help them retain their independence in their own home; e.g. home health care, SCAT Plus transportation, or caregiver respite programs. For some, seeking outside help carries a stigma of need or dependency. This stigma often discourages older adults from seeking available resources.

Community Interest & Activity

Sarasota: A Community for All Generations

In January 2006, the United Way of Sarasota County, in partnership with Senior Friendship Centers, began the planning phase of an initiative that

focused on building community capacity to help our communities' age and live well. This work evolved into the creation of the Sarasota: A Community for All Generations Leadership Council designed to improve Sarasota County's ability to prepare for an increasingly aging society. Two initial signature areas of focus: Aging in Place and Community Engagement were developed with ongoing multi-partner workgroups. Creative Aging also became a significant area of strategic thinking and action. The Leadership Council and its workgroups continue to meet bi-monthly to share, connect, support and encourage aging-related ideas and initiatives.

Caregiving & Supportive Services

The topic of caregiving and supportive services emerged from community discussions about healthcare. Caregivers are those individuals who provide uncompensated care for a friend or relative. We know them in our family, as neighbors and co-workers. Nationally, about 50 million people provide uncompensated care each year and this translates into \$250 billion in "free" caregiving services.

We envision a community where caregivers are recognized, valued and supported and where individuals, associations and institutions take part in supporting older adults as they age in their community.

Caregivers are often lacking the information, resources and support that would make their role more manageable. The focused support of caregivers is critical to a strong and vibrant community. Volunteer caregivers provide an important service that is critical to our national healthcare system.

To support and value caregivers, specific steps include:

- Create a **place or places** where caregivers can access countywide information about caregiver resources.
- Offer **flexible opportunities** for caregivers to be

engaged in meaningful ways (such as caregiver support groups and activity clubs).

- Businesses should allow **flexible schedules** to allow a caregiver to work and provide appropriate care
- Individuals, associations, and institutions should take steps to **support caregivers** (existing examples include picking up groceries for a caregiver among your friends and neighbors, forming a small-scale volunteer respite program in your community, or being flexible and supportive as an employer with an employee who is or has recently become a caregiver).

Context

There are two challenges to providing information and resources to caregivers. Caregivers vary as individuals and, due to the demands on their time, may be isolated from social support networks or associations that might connect them to information and resources. It has also been found that many caregivers do not define and acknowledge themselves as a caregiver until they have been providing care for six to twelve months.

The needs of caregivers fall into three general categories:

- Education about the specific disease or condition of the care recipient and skills and resources to help them in the caregiver role
- Social support in terms of someone to talk to or a support group
- Respite to ensure they have time to take care of their own basic needs

It is in the best interest of our community that all residents, associations, businesses, non-profits, and government strive to support caregivers. 25% of employees are caregivers of elderly relatives, and about 40% of these people are also caring for children under 18. Nationally, one in five Americans is helping an elder. Caregivers are important members of our community and vital to our workforce. Every individual and organization in Sarasota County has a role to play in supporting caregivers.

The role of caregiver can take its toll on the caregiver. In an AARP study, half of all caregivers reported that

they have less time for friends or other family. More than four in ten say they have given up vacations, hobbies, or their own social life. These statistics demonstrate the decline in social and community engagement that is especially crucial for older adults who may feel a lack of direction or sense of purpose because they no longer have defined roles. Research shows that more than 1 in 10 caregivers become physically ill as a direct result of caregiving.⁶

“Every time I talk about it I get very emotional. I had two friends that were caregivers for their loved ones and it was very hard. They had to depend on a neighbor or someone else to come and take care of their loved one while they even went to get a haircut.”

–Joan Fischer (Founder of A Special Time, a volunteer caregiver respite program serving North Port and Venice.)

Caregivers may help a spouse, parent, relative or neighbor stay in their own home. Older adults who are able to remain in their community are more likely to positively describe their sense of self-control, their success in dealing with aging, their life satisfaction, and their quality of life. Being forced to leave your home and community, because you and your loved one(s) can no longer meet your own needs, disrupts social networks and is a significant barrier to personal health and community engagement.

Creating a community where caregivers and their families are supported and engaged helps to sustain their home environment and proactively prevent the situation where caregivers and families become isolated. To flourish as a community we must maintain and increase our connection to one another and we must strive to structure our community in a way that supports caregivers and aging in place.

Community Interest and Activity

Sarasota has caregiver education opportunities as well as support groups and respite options. The challenge

is to connect caregivers with these opportunities. Communicating the local opportunities is critical and new ways to do so should be explored.

The Annual Caregiver Forum

This event is an opportunity to share resources, raise community awareness and provide information and training for family caregivers as well as professionals. A true collaborative effort, the Caregiver Forum is regularly attended by numerous area organizations (such as Senior Friendship Centers, Tidewell Hospice and Palliative Care, Alzheimer’s Association, Jewish Family and Children’s Service, Sarasota Memorial Hospital, Meals on Wheels PLUS of Manatee, Manatee County Government, AARP, Proeger & Associates, and Sarasota County Library System.)

The Caregiver Resource Center

Created by Senior Friendship Centers, the Caregiver Resource Center concept created a haven where caregivers find support, education and connection to resources. The initial programming, volunteer training, and resources became available in late 2007.

The Caregiver Resource Center is a safe and welcoming place for individuals and families to turn for training, support groups, information and referral, access to community resources, and community engagement. The all-inclusive setting improves the quality of life for families and caregivers, increasing their ability to sustain themselves and better care for loved ones. A true community partnership, the Caregiver Resource Centers located in Sarasota and Venice each have more than 45 supporting agencies from the community who provide everything from art therapy programs to chair massage for weary caregivers to small classes on stress management and so much more. These are truly people caring for those who care for others.

The NORC Project

As we move toward creating a community for all generations, it is important to define and recognize the role institutions (businesses, nonprofit and government) can play. The NORC Project is an

⁶ FSU Pepper Institute report: “Snapshot of Florida’s aging population”, 2004

example of an institutional program that focuses on supporting older adults as they age in their own home. NORC stands for “Naturally Occurring Retirement Community” and the local demonstration project was designed to help seniors age in their homes and neighborhoods. This program began with federal funds as a demonstration project with lead agency Jewish Family and Children’s Service of Sarasota-Manatee (JFCS), collaborating with Senior Friendship Centers, Catholic Charities and the University of South Florida. Since this demonstration, JFCS, partnering with the leading aging services providers, has received state funding to continue and grow the program. State support is a statement of the success of the program which can be attributed to the unique approach NORC uses in working in the community.

This project uses strategies to empower seniors to “age in place” and offers social opportunities, services, and resources. The first phase of the project is a survey, designed to shed light on questions regarding life satisfaction, factors that cause stress, desired supportive services, and interest in activities and involvement of elders in our community. Following the survey, a project manager works with the community to provide appropriate programs and resources. The process NORC uses is important because it engages the residents of the neighborhood in determining what programs and services become available. This focus on what residents of the community have to contribute is a valuable approach.

Friendship At Home

Friendship At Home uses volunteer power to deliver supportive care to the most vulnerable of the elderly in our community. As a complement to Senior Friendship Centers’ case management operation, Friendship At Home pairs pre-screened, trained volunteers with homebound and isolated elders in the community. These are at risk, frail elders who need a little bit of assistance to continue to live independently in their homes. Some individuals request this assistance and others are identified by neighbors, postal carriers, the faith community or family members as someone who could use a little extra attention from a caring person. Volunteers provide a link to companionship, socialization,

simple chores such as changing out a light bulb, or picking up prescriptions or small items from the grocery store before their visit.

There are two key components to Friendship At Home: Telephone Reassurance and Friendly Visitors. Telephone reassurance callers are assigned to check in every day at the same time providing a friendly voice and personal contact. This has proven to be a good way for another homebound person to volunteer in a meaningful way. The Friendly Visitors volunteer goes through a series of interviews and training sessions before they are matched with their new friend. A weekly visit of at least an hour often turns into a friend who feels like extended family. Intergenerational volunteering opportunities often grow from this program and families find the experience enriching and rewarding. This is also a good way to involve faith-based volunteers who seek a way to take care of their congregants and neighbors.

Residents and Associations

There are opportunities for groups of residents and associations, who are passionate about supporting caregivers, to take action. In 2004, a group of North Port and Port Charlotte residents founded a caregiver respite program called “A Special Time” in their local community. A Special Time is a community-based, non-denominational, adult day care program that provides respite to caregivers once a week. A professional RN directs the program and is on-staff to meet the medical needs of the participants. Trained volunteers give one-on-one attention to the participants during program activities. Five area churches (North Port Community United Church of Christ, St. Paul’s Presbyterian, Living Waters Lutheran Church, United Methodist Church, and St. Nathaniel’s Episcopal) provide volunteers and a volunteer coordinator. Living Waters Lutheran Church provides the space for the program. Developing or supporting a caregiver respite program is one of the many ways citizens in Sarasota County can support each other.

Individuals who care about supportive communities also have a role to play. Many residents of Sarasota County participate in supporting caregivers and their families in simple, natural ways. Millie Small

is an example of a local resident who made herself available to families in her neighborhood who no longer drive. She takes neighbors to the grocery store or a doctor's appointment. Every person in our community has the opportunity to make Sarasota a better place to live no matter what their level of involvement in the community. There are many people who, like Millie, share friendship and acts of care with the people they know through their family, neighborhood, congregation, and employment.

Neighbors and Neighborhoods

SCOPE's work in neighborhoods began with the desire to explore the possibilities for residents and neighborhoods to help create a positive environment for aging. Neighborhoods are a microcosm of the larger community and neighbors have the opportunity to get to know each other and support each other in meaningful ways.

In Sarasota County there are neighbors and associations who have created informal transportation services, connections to homebound seniors, systems for sharing relevant and timely community information, help with yard work and household chores, emergency lifelines and social gatherings.

Through *Aging: The Possibilities'* focus on neighborhoods, it is evident that increasing the connections and relationships that exist among individuals is the foundation for creating a community for all generations.

We envision a community where residents are neighborly, demonstrating care and concern for one another; and are working together to make their neighborhood a better place. This includes partnerships with local businesses, government, and nonprofits to improve their quality of life.

To achieve this, individuals should:

- **Take the time** to get to know their neighbors and build meaningful relationships among people in their neighborhood or community.

- **Consider what it is you care about** in your community or neighborhood. Discuss what you can do to have an impact on this topic with other residents who care about what you care about.
- **Join with others** in their community and take collaborative action to make your neighborhood or community better. [This can be as simple as a block party or pot luck intended to increase community cohesiveness or something larger like creating a summer camp for neighborhood children or organizing a neighborhood watch program.]

Nonprofits, businesses and government should consider your mission and vision and how your organization might be able to fulfill them in ways that involve local residents, civic associations and neighborhoods.

Context

There are many important roles for businesses, nonprofits, and government to play in fostering and supporting unique collaborations among residents, associations, and institutions. There are many opportunities to connect with individuals, associations, and neighborhoods in new ways that benefit our community and our missions.

When thinking about how one might collaborate, it is useful to focus on the knowledge, skills, and interests of each individual and organization. Questions to explore include:

- What do I care about?
- What am I concerned about?
- What can I do around what I care about?
- Who do I know that cares about what I care about?
- How can I include others in decisions or projects?

Sarasota County is rich with people who are diverse, creative, talented and passionate. To grow a connected community where people matter to each other and no one is forgotten or alone, we need to nurture and activate relationships, be engaged with each other and focus on possibilities.

Over the past two years area neighborhoods, associations, nonprofits, and government have explored how to work together in new ways and we have experienced and participated in coordinated action to make Sarasota County a supportive community for all generations. At the heart of this work are residents who care about their community and their quality of life.

Community Action

There are hundreds of neighborhoods in Sarasota County. In each neighborhood there is guaranteed to be something great going on as well as the opportunity for people to make more great things happen. A great thing is an interaction between two or more people that creates happiness, inspires ownership, or improves their quality of life.

To illustrate this idea we will look at some stories from the neighborhoods. These vignettes serve as examples and are not being suggested as specific actions and projects that every person and organization should do. These stories illustrate the importance and impact of getting involved in something you are passionate about and making a difference right in your front yard.

Venice

Venice Gardens is a neighborhood that has historically been a retirement community. Over the past decade, the character of the neighborhood has changed as the reasonable price of housing and good location has attracted younger families. In 2008, the Venice Gardens Home Owners Association celebrated their 50th anniversary. As this year approached, several members of the association became more interested in growing the association to include more residents of Venice Gardens and bridge the gaps that exist among the generations. These residents saw the association as an asset to the community that can collectively

“The idea that people don’t want to volunteer is not true. People enjoy getting involved but they need to be asked and be necessary to the project.”
- Linda Lukacs of Venice Gardens

represent the interests of the community. They also saw that the association had tangible physical assets to the community because it owns a civic building and a pool in the heart of the neighborhood.

In 2006, these residents came together with Goodwill Industries Manasota, Sarasota County Government Neighborhood Services, and SCOPE to exchange resources and think creatively about how to strengthen relationships among residents and grow the association. After some exploration the group decided to host a community celebration that would provide something for every child, parent, and retiree in the neighborhood. This group of individuals, organizations, and government worked through the details and maintained a focus on involving as many residents as possible in the decisions and tasks resulting in two community celebrations in 2006 and 2007.

These events were attended by nearly 200 residents and many area organizations. Due to these celebrations, the association has grown. Deeper bonds have occurred among residents and community members feel greater ownership and pride. Association members and residents in Venice Gardens regard the event as a way to connect with each other and look forward to making this an annual opportunity to strengthen community cohesiveness.

“We have connected with some local people and acquired new members for the Association. Local businesses have been more aware and are helping with association activities. Churches in the area have joined the organization and are helping us with our local disaster response program.”
– Anonymous

Sarasota

The goal of the Amaryllis Park Civic Association (APCA) is to increase neighborhood cohesiveness, the participation and cooperation of older and younger residents, and improve the general quality of life in the neighborhood. Work going on in the neighborhood focuses on the creation and implementation of disaster preparation, crime

“The approach helped me understand how residents feel about their neighborhood. I have also gained new leadership skills and a method to get residents to share what they care about. The workshops and discussions have made me more aware of my own style of leadership and provided helpful tips on how I can improve my meetings.”

– Carl Stephens of Amaryllis Park

prevention (through programs like Enough is Enough), Martin Luther King Celebrations, and health improvement.

In 2006, SCOPE staff met with the executive board of the APCA to explore new ways to find out what residents cared about and how the association might be able to get more people involved. The executive committee focused on community cohesiveness as Amaryllis Park was unique in that neighbors looked out for and took care of one another. The executive committee led neighbors in small group discussions through the same questions that they had experienced in the SCOPE-facilitated discussions. This process gave the association leaders a sense of how residents felt about their neighborhood and ideas for projects the residents wished to pursue.

In October of 2007, Amaryllis Park Civic Association hosted a plant-give-away and sixty new neighbors agreed to complete a capacity inventory that asked questions about their interests and concerns. The association has conducted community discussions about crime and is identifying ways for residents to have an impact. As the association continues to thrive, SCOPE is spending time with the group and looking for opportunities to increase neighborhood participation as well as ways to support the residents as they take ownership of their community.

North Port

In 2004, Joan Fischer of the Living Waters Lutheran Church joined with North Port residents from five area churches to create A Special Time, a nondenominational, volunteer caregiver respite program providing service for four hours every Friday. This program provides activities and a hot meal to participants who suffer from various forms

of adult dementia. The group has also created a caregiver support group that takes place twice a month on the same afternoon the program runs. Wilma Ellis, RN, runs the Friday program along with the support of volunteers from five area churches: Living Waters Lutheran Church (also provides the space), North Port Community United Church of Christ, St. Paul’s Presbyterian, United Methodist Church, and St. Nathaniel’s Episcopal.

SCOPE facilitated a visioning process and the creation of a long term plan for A Special Time. This process engaged the program volunteers to articulate the values, benefits, and goals of the program and identify community resources for expansion. The

“We learned how to approach and involve others and to discover what other people’s talents are in order to capture their knowledge and put it to use. It is very rewarding. Everyone involved, including participants, caregivers, and volunteers, are very proud of the program.”

– Anonymous

group outlined steps to ensure A Special Time could continue to serve their current participants and explored the possibility of creating a second day. The planning group, while regularly involving new people, created a speakers bureau to create awareness of and gain support of their program in the community. They also developed a plan to reach out to more networks of people, such as local higher education institutions, businesses and congregations, to attract more volunteers.

The volunteers and caregivers feel an important value of the program is the small scale and the personal connections among participants, volunteers and caregivers. A survey in 2006 showed that participants look forward to the program and some have showed a positive change in behavior. Caregivers expressed the importance of a break from responsibility and the opportunity to do something for one’s self. Finally, the volunteers enjoy a rewarding experience and

“It brings me as a caregiver back into the world and our loved one’s feel at ease here.”

- Catherine Wimette

“Caregivers need a break. You think you don’t but you really do. You think you can handle it, you think you’re OK but really it’s wonderful just to have a break.”

- Carol Sutton

know that their time and participation in the program is making a difference in the lives of local families. Participating in A Special Time is uplifting and they have developed meaningful relationships with other North Port residents.

Sarasota

The residents of The Winds of St. Armand’s, an age-restricted, manufactured-home community, have an astounding number of clubs and activity groups who meet to socialize and enrich their lives. In 2006, the residents created Helping Hands; a group of residents who help spruce up the yards of neighbors unable to keep up with their yard maintenance. The program began because residents realized that some neighbors were not physically or financially able to maintain their yard. Instead of calling code enforcement or letting the management company fine these neighbors, this group has taken up the job of lending a helping hand.

“New ideas take time to take hold so patience is needed. Be enthusiastic and begin with something you are comfortable doing whether it is strolling the neighborhood or organizing a block party.” – Pam Bournival of The Winds of St. Armand’s

“The process that has been used has brought A Special Time—Adult Day Care/Respite Program—a greater awareness of our community and its’ resources and it has shown us how to determine our next steps and accomplish them in a collaborative way.”

– Anonymous

Recognizing how this program benefited both the residents involved and the cohesiveness of the community, resident Pam Bournival created a survey to gather information about what her neighbors cared about in their community and what skills or talents they were willing to share. The results revealed an excitement for potlucks that inspired a group of residents to coordinate community dining and organize sing-a-longs. Based on information from this survey, Pam convened a group of neighbors who expressed an interest in organizing information and coordinating programs. This group began to explore a Community Buddy program to match up neighbors to share rides, meals, phone calls, and visits.

While organizing this program, residents recognized that there are nonprofits in the community who have experience in running similar programs. Senior Friendship Centers (SFC) is now partnering with residents of The Winds to share their knowledge and build the capacity of residents to effectively nurture informal networks of friendship and care. The relationship between SFC and this group of residents is defining a new way for nonprofit organizations to accomplish their mission by supporting the exchange that happens among residents and associations. As the group moves forward, they are planning a second survey so that they may match residents with each other to exchange skills and talents and to build supportive relationships within the community. SCOPE, SFC, and NORC, three institutions working in The Winds in different capacities, are convening to think through how best they can collectively support the residents of The Winds of St. Armand’s.

“When our clubhouse was closed for renovation I held a community Thanksgiving Pot Luck dinner at our house and that went over very well. It got residents to sit up and take notice that not everything has to be at the clubhouse. Since then there have been several more community-invited activities at other’s homes. We have also had meetings in homes instead of the clubhouse and this leads to a more intimate and relaxed gathering. I have been more aware of my immediate neighbors and looking for ways to help as needed.”

- Pam Bournival of The Winds of St. Armand’s

Conclusion

Through these four diverse neighborhoods, SCOPE has experienced how residents create change that improves the quality of life. We are struck by the importance of citizens undertaking neighborly practices. The experience of the residents who are involved in the Venice Gardens Homeowners Association, Amaryllis Park Civic Association, A Special Time, and The Winds of St. Armand's Homeowners Association are testimony to the power of an individual or a group of individuals to make a difference in their neighborhood.

An asset-based approach was embraced for SCOPE's Neighborhood Initiative. This philosophy recognizes that every individual has assets (knowledge, skills, and talent) to share and the power to make a difference in their community. Focusing on the assets of a community does not imply that additional resources are unnecessary. Rather, this approach recognizes that outside support will be much more effective if a local community is mobilized and invested, and if it

can define the issues for which additional resources would be useful. A focus on a neighborhood's assets affirms and builds upon the remarkable work already going on in the neighborhood. It is critical that businesses, government, and nonprofits work with residents to figure out how to support the work done at the neighborhood level.

This type of institutional shift is long-term and requires an intentional effort by the institution. As nonprofits, government, and businesses shift their approach, there is an important role for funders. Funders grant making guidelines and priorities shape what is measured and how programs are delivered in our community.

Funders have a powerful role in fostering asset-based programs and organizations that will in turn grow community strength and contribute to sustainable, citizen-driven change in our communities.

Five proposal guidelines useful to encourage asset-oriented programs:

- Clearly identify the skills, abilities, capacities, and assets which local residents will contribute to the proposal. How will local residents' capacities be used to address the issues identified? Has an inventory of the capacities and skills of local residents to help guide the process been developed?
- Clearly identify the capacities of your community's citizens associations, and indicate how they will be involved in both governance and problem-solving in your proposal.
- Indicate how this proposal will mobilize, utilize, enhance and expand these local capacities.
- Contribute to building the local economy by, for example, employing community residents, enhancing local purchasing, capturing public budgets for local use, etc.
- Show evidence of significant investment of resources and time by local residents and organizations before funding is initiated.

John P. Kretzmann and John L. McKnight,
*Building Community from the Inside Out:
A Path Toward Finding and Mobilizing a Community's Assets,*
p. 356.

Workforce and Economic Opportunities

Nationally the labor force is changing. By 2012 nearly 20% of the workforce will be 55 and older. The disproportionate numbers of baby boomers (those born 1946 -1964) contributes largely to this shift. By 2012, we will see a decrease in the population of workers age 25 to 44.

Research shows, “four in five boomers have told pollsters they intend to work past their traditional retirement age, and many want to find new jobs with a higher social purpose and more flexible hours.”⁷ Their reasons for work include the desire to matter and have a sense of purpose, supplement their income, personal enjoyment and health insurance.

Potential Impact of Baby Boom Retirement

- Rising competition for skilled, qualified workers.
- Los of critical knowledge assets
- Rising labor and training costs of workers aged 25 to 44

Source: AARP Florida Workforce report

Coming Labor Force Changes

- By 2012, nearly 20% of the workforce will be 55 and older
- Highest growth rate in the workforce will be among persons aged 55 to 64
- Concurrently, there will be a decrease in the population of workers aged 25 to 44
- Labor shortages will have an adverse effect on productivity and economic growth

Source: AARP Florida Workforce report

Currently in Sarasota County, almost 32% of our population is age 65 or over, as compared to the nation at 12.3%.⁸ This presents an enormous opportunity as a largely untapped force of skilled and talented individuals. Only 7% of the workforce in Sarasota County is age 65 or over,⁹ compared to 12% in the nation.¹⁰ These demographic realities converge here and compel us to create an environment that entices and retains older workers.

Community Interest & Activity

The Suncoast Workforce Board and the Economic Development Corporation of Sarasota County have initiatives underway that are trying to meet the needs of the business community and provide opportunities for employees wishing to transition within their job as well as early retirees looking for

“...not only are the baby boomers leading a demographic revolution that is changing the way we think about aging, they are also leading a consumer revolution that is changing the way we do business. And the two are connected: demographics and consumerism - we can't think of one without the other...how can providers of goods and services relate effectively if they don't have at least some people like their consumers in their workforce?”

- William Novelli, CEO of AARP

⁷ “Community colleges feed baby boomers’ hunger for knowledge” Bob Moos (MCCLATCHY NEWSPAPERS)

⁸ 2007/2008 UNDP Human Development Report

⁹ SWB - email 10.09.07

¹⁰ Bureau of Labor Statistics

We envision employers in all sectors - public, for-profit and not-for-profit, developing and using strategies to attract and retain older employees, as an integral part of a diverse, first class work force, both paid and unpaid.

a second career. SCOPE is collaborating with these ongoing initiatives which involve the Chambers of Commerce and business professionals in the region.

Dialogue continues to occur throughout the community as Manatee Community College and local Chambers of Commerce explore ways to attract and train older workers. In September, 2007, Judy Goggin of Civic Ventures spoke at a Community Assembly focused on the changing nature of retirement. Goggin shared the exciting examples of communities creating ways to help older workers and the impending wave of baby boomers as they shift our traditional models of work and volunteerism.

Suncoast Workforce Board

The Suncoast Workforce Board has convened a committee to focus on the mature workforce. Their purpose is to help educate employers on current practices to attract and retain semi-retired workers and retirees who want to be in the workplace. The Committee has developed two surveys, one targeting employers and the other employees, in partnership with AARP. The goal is to better understand the conditions desired by an older workforce as they transition to a new phase of meaningful employment and understand the current knowledge and practices of local employers. This will form the basis for developing materials, learning opportunities and networking venues.

Through this committee, the Manatee Chamber of Commerce with AARP piloted a series of educational luncheons for employers. These were designed to engage small cohorts of employers in discussion of key workforce issues related to a shrinking workforce. Topics included: assessing future workforce needs, recruiting mature workers, developing flexible working arrangements, caregiver issues and resources.

Economic Development Corporation of Sarasota County

The Economic Development Corporation (EDC) is working to increase diversity in the workforce of Sarasota County. Workplace diversity covers the wide range of differences between people in an organization including race, gender, ethnicity, age as well as other attributes. The EDC commissioned Manatee Community College to conduct a series of focus groups in order to develop a better understanding of the needs and diverse composition of local companies. Focus group recommendations were directed toward the EDC as well as local businesses. Based on these findings, the EDC sponsored a well attended Workshop in March 2008 entitled "Capitalize on Today's Diverse Workforce" where business leaders were able to attend three roundtable discussions throughout the day. The topics included The Aging Population: What's it Mean for Employers? , The Power of a Diverse Management Style, Gen Y, Managing for Conflict Avoidance and Resolution, Succession Planning in Women and Fostering Racial Diversity as a Method of Team Building.

A focus group was conducted in August 2008 and Human Resource Managers from selected business sectors were asked to assist with pinpointing the future needs of the changing economic landscape and diverse workforce. A Diversity Resource webpage Guide will be produced in 2009 based on the results compiled from the focus group.

Nonprofit Resource Center

The Nonprofit Resource Center (NRC) of the Community Foundation of Sarasota County hosted a workshop in February 2008, focused on strategies for businesses to attract and retain an older workforce, both paid and unpaid. In February 2009, they hosted Peter Brinkerhoff, author of *Generations, The Challenge of a Lifetime for Your Nonprofit*, which covered six generational trends that matter to a nonprofit.

The NRC has already tapped into the talent of retirees through the creation of their consulting services, drawing on a corps of experienced volunteer consultants to offer objective, customized support to local nonprofit organizations. Since January 2005, 19 highly experienced volunteer consultants have offered their services to 53 nonprofit organizations in the community. These services have included strategic planning, fund development planning, board development and human resources issues. The volunteers are well known for the compilation of the bi annual Compensation and Benefits Survey.

Friendship Volunteer Center

The Friendship Volunteer Center (FVC) has developed trainings to help non-profit leaders engage their volunteers in more meaningful ways as well as training for nonprofit staff to perform the role of volunteer coordinator within their organizations. Volunteer-led advisory boards have focused on key areas such as mentoring, disaster preparedness and corporate volunteering. This has raised the level of interest and commitment from volunteers assuming these leadership roles. The FVC has a community-wide VISTA project providing stipends

“We have so many wonderful educated and experienced people in our community; the human resources are breathtaking.”

- Millie Headdy, participant

for volunteers working in neighborhoods. The focus is to engage residents to help their neighborhood be better prepared for a disaster and to help neighbors assess their assets – their collective talents and skills, and identify ways they want to work together in their neighborhood.

These examples indicate we are moving in the right direction. We must continue to provide learning

opportunities to increase awareness of professionals and the greater community.

Economic Opportunities

In the U.S., 45% of the population is age 40 or over in 2007.¹¹ Experts estimate that more than 90% of net assets in the U.S. are in their hands.¹² This represents enormous economic power.

The size of the 50+ population will double over the next 35 years.¹³ As people live longer due to improved personal choices and access to sophisticated health

We envision an economic environment that attracts and sustains businesses that manufacture and distribute leading-edge products and services for older adults of all generations.

care, there will be demand for relevant products and services to meet a broad expanse of needs and wants. The 65+ cohort is not a homogenous group and the boomer generation consists of hundreds of different market segments. At each life-stage transition, a variety of business opportunities emerge around family, health, housing, finances, work, retirement, daily activities and the search for meaning.¹⁴

In Sarasota County, 42% of the population is age 55 or over ¹⁵, while nearly 63% of the population in Sarasota County is age 40 or over ¹⁶. This demographic makes Sarasota County a compelling market and test site. We are in a unique position to attract manufacturers and distributors of creative products, prototypes and services.

According to Scruggs and Associates, the sectors of the community that would be impacted from medical and life sciences alone include “pharmaceutical manufacturing, instrumentation manufacturing, medical equipment and supplies

¹¹ *Turning Silver into Gold*, p. 10, #4

¹² *Turning Silver into Gold*, p. 8, #9 *San Francisco Chronicle*

¹³ AARP

¹⁴ *Turning Silver into Gold*, p. 11

¹⁵ County website, 2005 Statistic

¹⁶ U.S. Census Bureau, 2006 American Community Survey

Life-Stage Transitions Creating Economic Opportunities

- Family - Empty nests, loss of parents, birth of grandchildren
- Health Issues - Menopause, heart disease, vision and hearing loss, arthritis
- Housing - Downsizing, right sizing, remodeling, second homes
- Finances
- Work
- Retirement
- Daily activities - Time for passions and play
- Perspective - The search for meaning

Source: *Turning Silver into Gold*, pg 11

manufacturing, testing laboratories, scientific research & development services, diagnostic imaging centers and specialty therapists.”

¹⁷

This vision will require the efforts of the Economic Development Corporation of Sarasota County (EDC) and local Chambers of Commerce. On March 20, 2009 the Economic Development Corporation of Sarasota County held The Economic Strategic Vision and Leadership Forum. Among the recommendations was the promotion of a “Platform on Aging”. The goal is to “become a national leader in research and businesses that serve the growing needs of aging populations.”

Steps to consider:

- Create a forum to increase awareness of market trends and possibilities
- Invite innovative manufacturers to showcase their products to the public and potential retail distributors
- Explore opportunities through the existing EDC Cluster Groups (e.g. Healthcare Simulation, Specialty Manufacturing, Life and Environmental Sciences, Financial Services)

One area of untapped potential is the market for devices to help daily living, manage health concerns or create a safer environment. These products and

services range from the simple to the complex. Examples include stove burners that turn off after a designated time period; monitors to remind one to take medication and send simple health information (i.e. blood pressure, weight, heart rate) electronically to a medical professional; and vibrating shoe soles to stimulate nerve endings and help improve balance. Our community is poised to explore creative and intentional dialogue around this topic. Product and market research are possible components of an institute focusing on aging and community transformation.¹⁸

Housing and Physical Spaces

Universal Design - Community Design - Housing

The design of our physical environment is integral to aging successfully. As form follows function, the form of our homes and the larger community should facilitate the ability to access goods and services and to connect and contribute in the community. Three areas were of major importance: universal design in the home, community design and the opportunity for creative housing options for older adults.

¹⁷ Economic Opportunities & Direction For Sarasota County, Scruggs & Associates, 2009

¹⁸ *Turning Silver Into Gold*, Mary Furlong, pp. 249 – 250

Characteristics of a Livable Community

Affordable and appropriate housing
Supportive community features
and services
Adequate mobility options

These features work together to facilitate personal independence and the engagement of residents in civic and social life.

Sourced: *Beyond 50.05*, AARP

Universal Design

According to the AARP Study, *Beyond 50.05* (2004), research shows that a majority of older adults across the nation have a desire to “age in place” - to continue to live in the communities and homes in which they have spent a significant portion of their lives.¹⁹ However, in a national survey of people age 50 and over, nearly half the respondents stated that their home would not meet or would only somewhat meet their needs as they grew older.²⁰ Some “aging in place” features were more common, with 85% of respondents having a full bath on the main level of the home and 81% having a bedroom on the main level. On the other hand, only about one-third reported having wider than standard doorways or an entry without steps and about one-quarter reported having lever door handles.²¹

What We Learned

Universal design is an integral component of “aging in place.” **Universal design** is a design philosophy for creating products, services and environments to be

used by all people regardless of age, ability or circumstance. Universal design focuses on ability rather than disability and attempts to accommodate the broadest range of consumers.²²

By creating a barrier-free environment, Universal Design principles enable individuals to remain in their homes as they age even when mobility and other physical abilities decline. There are many design considerations that can make a home easier to navigate for older adults, young children and those with limited mobility.

Consumers of all ages are beginning to recognize that such design principles can enhance their living space without sacrificing aesthetics. Universal design is appealing to people of all ages.²³

Universal design applications can be integrated into new building plans or retrofitted to existing homes. It offers an alternative to leaving one’s home and may increase the length of time an individual can live independently.

Universal Design - Basic Features

- Single floor living (a one-storey home or a two-storey with a bedroom and bath on the first floor)
- Open, flexible floor plan (easy flow of one room to another with few corners and turns)
- Extra wide doorways and hallways
- Additional lighting throughout for increased visibility
- Minimal or low-step entries and thresholds
- Levers rather than knobs - for a mom with groceries and a baby in arms or an adult struggling with arthritic hands
- Raised electrical outlets and lower-height, rocker-style or touch light switches
- Easy-roll flooring
- Flexible, multi-use space to accommodate home offices, grown children, grandchildren, guests, etc.

¹⁹ *Beyond 50.05*, AARP p. 48

²⁰ *Beyond 50.05*, AARP p.8

²¹ *Beyond 50.05*, AARP pp. 52-53

²² *Universal Design Demonstration Home*, Casino Redevelopment Investment Authority , p.1

²³ “Young Homeowners Design Their Homes to Grow Old In”, Wall Street Journal, February, 2003

It is far less expensive to include universal design features in the initial building rather than to retrofit. One recent estimate notes that universal design adds about 2 to 4 percent to the cost of a new construction home compared with 30 percent for a remodel.²⁴ Currently 1 in 8 households in the U.S need functional modifications to enable the resident to remain in their home. In a recent study (50.05 Report, AARP), persons age 50 and older and those with disabilities regarded the cost of renovation as a major barrier to home modification. Other concerns included not being able to do the renovations themselves, hesitation about selecting a contractor and about the specific changes needed. Helping connect residents with information and appropriate resources is an important strategy in every community.²⁵ One way to accomplish this would be to connect residents to contractor designated as a Certified Aging in Place Specialist (CAPS) who has completed specific training regarding application of universal design principles.

Some of the products that boomers are looking for include “smart homes”, which are “centers for entertainment, work, commerce, learning and wellness...” all in the comfort of home.²⁶ Others include, home offices, universal design, cutting edge interior design, second homes and plenty of space for guests to stay.²⁷

The Home Builders Association of Manatee-Sarasota has expressed interest in educating its members about the value, low cost and relative ease of offering and incorporating these principles in the designs of new homes. HBA of Manatee-Sarasota has links to the resources at the Florida Home Builders Association (FHBA) and the National Association of Home Builders (NAHB):

- FHBA has offered all three of the qualifying courses at South East Builders Conference (SEBC) and have received approval for

continuing education credit through CILB for builders seeking Certified Aging in Place Specialist (CAPS) designation. These courses will again be offered at SEBC in Orlando this summer.

- The NAHB has created a new American Living Award to honor individuals with CAPS designations.

Volunteers met with a local developer regarding offering such modifications in a condominium complex.

Design for the Lifespan: Aging in Place,

A collaborative effort between AARP and the National Association of Home Builders (NAHB), with funding from the National Endowment for the Arts (NEA) to reach the mainstream market for homes designed for the nation’s aging population.

AARP has shown in its Fixing to Stay project that people want to “age in place” (in their own homes), which raises the urgent need to train remodelers and contractors who are responsible for much of the home modification work. A key outcome has been a program called Certified Aging-in-Place Specialists (CAPS).

Local media provided substantive articles that highlight these principles and showcase local examples.

ReHabitat, a program of Habitat for Humanity Sarasota County, uses volunteers to help repair existing homes for elderly people. The intent is to create a safe environment so the elderly and those with disabilities may remain in their homes. The work has included installing grab bars, widening doorways, and replacing tubs with walk-in showers. To date, they have improved 65 homes ranging from the basic to complex in repairs and renovations.²⁸

²⁴ “Builders Embrace Universal Design”, Ann Matesi, January 2007, www.housingzone.com

²⁵ Beyond 50.05 Report, AARP p.55

²⁶ “Turning Silver Into Gold”, Mary Furlong, p. 129

²⁷ “Turning Silver Into Gold”, Mary Furlong, pp 124-129

²⁸ TC with Cas Azera, 1/4/08

Specific local strategies include:

- Educate consumers about the value of universal design features through the media, workshops and local programs.
- Identify local Certified Aging-In-Place Specialists and increase community awareness about retro-fitting one's home.
- Create a certification program to encourage local homebuilders to incorporate universal design principles regularly in their products. The program could be modeled after the nationally recognized Leadership in Energy

The Easy Living Home Coalition

In this initiative, the Home Builders Association of Georgia, AARP Georgia, Concrete Change - a non-profit organization committed to making homes "visible" by people with diverse abilities - and several other groups, are collaborating on a voluntary program to certify open-market homes that meet a specified, basic standard of universal design.

and Environmental Design (LEED) certification program for green building principles. This certification will create clear communication between builder and homebuyer and will help homebuyers identify those builders comfortable with this emerging trend in home design.

- Engage more volunteers to help low-income elders assess and modify their homes in order to age in place.
- Showcase products available locally, and promote local businesses that support universal design principles.

Simple design changes will make lives easier regardless of whether one is a parent with small children, a youngster in a wheelchair, an elderly neighbor with poor vision, or an athlete with a broken leg. Products can enhance independence and safety. A commitment to universal design principles helps Sarasota County set an example and lead the country as forward-thinking and innovative. Action on these strategies, from all corners, by both individuals and businesses, is needed in order for the community to reap the benefits of these principles.

Community Design

The way we design and build our communities impacts our lives in many ways. Being part of the fabric of community from accessing goods and services to enjoying learning and social opportunities is in part, contingent on the ease in which we are able to participate. The physical design of a community may support or detract from this ease.

While the vast majority of older adults wish to remain in their own homes, research suggests their use and enjoyment of their community is often challenged. A national survey asked respondents to grade their communities on a variety of features important to quality of life. More than 30% of respondents graded their communities poorly for features such as dependable transportation (38%), drugstores nearby (35%), grocery stores nearby (32%) and sidewalks where needed (31%).²⁹

Also, these lower community grades were associated with lower levels of community engagement and lower levels of successful aging.³⁰ Feelings of isolation, ability to participate in learning and social activities and ability to work, both paid and unpaid, were impacted by community design.

We envision a community designed to support healthy aging, foster connectedness and where public policy facilitates this vision.

²⁹ Beyond 50.05, AARP survey pp. 61-62

³⁰ Beyond 50.05, AARP survey pp. 63-65

“Unless America makes a commitment to livable communities, baby boomers and other persons of a range of ages and with a variety of abilities will find it difficult to age successfully and remain engaged with their communities. The shortage of affordable and well-designed housing, mobility options, and opportunities for community engagement make it difficult for persons to maintain independence and a high quality of life.”

Source: Creating Environments for Successful Aging, AARP

Sarasota County is made up of five geographic areas - the City of North Port, City of Sarasota, City of Venice, the Town of Longboat Key and the unincorporated county under the jurisdiction of Sarasota County Government. Each jurisdiction is governed by its own Comprehensive Plan which sets the vision and provides goals and strategies to reach that vision. Generally, these plans contain principles that are consistent with what is needed to create livable communities for all ages. Such principles lay the foundation for regulations that increase the ease and access of public transportation, improve walkability, connect residential areas to commercial business areas and allow for creative housing options.

In Sarasota County, our demographics compel us to think carefully about community design. Almost 30% of the population across the county is age 65 or over. The City of Venice has a median age of 69 and the Town of Longboat Key is 68. Good design is good for everyone and yet as our community ages, the impact of design becomes even more profound.

Smart growth principles are often part of discussions of redevelopment - the revitalization of the existing built environment to a higher, more productive use. Five of the ten principles of smart growth cited by the Smart Growth Network are consistent with and support the recommendations in AARP's national report, *Creating Environments for Successful Aging*.

Stemming from the broad goals and strategies outlined in any Comprehensive Plan comes the more detailed and specific zoning regulations. Zoning

regulations define how, where and how much to build. They have wide-ranging effects in creating our built environment and deserve further scrutiny in relation to how they support the characteristics of a livable community.

Housing

Zoning regulations also define the possibilities for types of housing that provide options and alternatives for older adults. The recommendation is to:

- **Develop housing options that include communal living arrangements, granny flats, mixed-use and mixed-income developments.**

Some of these options are limited by current zoning laws. These laws must be revisited before Sarasota County can move forward in creating housing options that are helpful to those who wish to continue to live independently. Every municipality within the County should examine its regulations and ask how they support housing options for older adults wishing to age in place. Our public policies must reflect our demographic reality.

Changes in these zoning codes requires community support as the expertise of planners and local government determines appropriate zoning code changes that could help the each community support various housing arrangements. In the absence of community support, changes are unlikely to occur. Public awareness of the community benefit is critical.

Ten Principles of Smart Growth

1. Mix land uses *
2. Take advantage of compact building design *
3. Create a range of housing opportunities and choices *
4. Create walkable communities *
5. foster distinctive, attractive communities with a strong sense of place
6. Preserve open space, farmland, natural beauty and critical environmental areas
7. Strengthen and direct development toward existing communities
8. Provide a variety of transportation choices *
9. Make development decisions predictable, fair and cost-effective
10. Encourage community and stakeholder collaboration in development decisions

Source: Smart Growth Network

** Principle supports successful aging recommendations.*

“A community so special that people will consciously choose to make St. Louis Park their lifelong home.”

To support this community vision, the city of St. Louis Park, Minnesota revised its comprehensive plan to support land use changes allowing more mixed use and public works investments facilitating walking. Zoning and development standards were amended to allow higher densities and mixed uses.

Source: www.aginginplaceinitiative.org

We envision a community where public policy is flexible and supportive of a variety of housing arrangements that help meet the needs of older adults living independently.

There are numerous examples of creative housing arrangements. Co-housing and caregiver cottages or “granny flats” are examples that require zoning changes in many instances. Locally, there has been interest in cohousing and a group of residents are working together to create a cohousing project in Venice. The Elder Cohousing Network, a national project, is working locally to provide training, resources and expertise to interested community members. For more information or to attend a learning session contact www.ElderCohousing.org.

The International City/County Management Association (ICMA) addresses local government with six strategies for promoting active aging:

1. Create safe and comfortable walking routes
2. Improve transportation options for older adults
3. Support housing choices
4. Encourage density and connectivity
5. Make the built environment more attractive
6. Promote awareness of active aging

Below is an example of how one community helped create an environment that made this type of housing available.

What is Cohousing?

Cohousing is a form of collaborative housing that creates a small-scale neighborhood. Residents own their own home and benefit from the sharing of a Common House which may include a large kitchen, multi-purpose dining room, multi-media space, workshop, rooms for overnight guests and laundry facilities to name a few. This housing arrangement creates the balance between personal privacy and life with a close-knit circle of neighbors.

Granny Flats and Santa Cruz

Streamlined the permit process, eliminating most of the red tape that prevented single-family homeowners from converting garages, basements and backyard space into “accessory dwelling units” or “granny flats.”

Offered low-interest loans up to \$100,000 to finance construction of the units, which are required to have their own kitchens, bathrooms, sleeping areas and separate entrances.

Created tools including a manual, a video, a set of architectural plans and other information, showing residents how to plan, design and get permits for the new living spaces.

Eliminated a requirement that single-family homes provide covered parking. That allowed homeowners to implement the cheapest method of adding a unit -- converting a garage. But the city also required that the homeowner provide adequate off-street parking.

Eliminated the need to win neighbors’ approval. A single vocal neighbor could squash the most low impact, carefully planned design. Now the assumption is that a homeowner who follows the city’s rules will be able to get a permit as long as the unit doesn’t block views or cause other obvious problems.

Homeowner must live on the site. This requirement eases neighbor concerns about absentee landlords.

Source: “The Rebirth of the Granny Flat”, Money, www.msn.com

“In particular, I was glad to see that many folks are thinking of various housing solutions to help seniors age in place. I am hoping that the report SCOPE prepares will assist the County to begin to form policy that will help change housing codes to allow “granny flats,” shared housing, multiple-family dwellings in R1, etc., especially with a focus on transportation options that are friendly to seniors and do not rely on automobiles.”

- Carolyn Gregov

Transportation Alternatives

Transportation is part of nearly every discussion regarding getting older in Sarasota County. Personal independence is seen as inextricably tied to transportation and the ability to get to where

In October 2006, SCOPE convened a community assembly on transportation options and opportunities. This assembly served as a springboard to explore transportation options that are practical and appropriate for our community. Giving up the keys to ones car was identified as the biggest threat to independence and well-being as one ages. We live

We envision a continuum of transportation services for older adults who no longer drive. The system is supported by individuals, businesses and public-private partnerships.

you want to go, when you want to go. Giving up the keys to ones car is a decision often postponed, because this translates into a loss of independence and a diminished quality of life.

In Sarasota County, over 45% of households contain a member over the age of 65. Residents in general drive 16% more than they did ten years ago. In 2006 there were over 95,000 registered drivers age 65 or over in Sarasota County. Of these, more than 48,000 were age 75 and over.

The 85 and over age group represents the fastest growing demographic segment of the population and over 50% of this cohort has Alzheimer's disease or other forms of dementia. Studies show that drivers with dementia are nearly 8 times more likely to be involved in an accident than others of the same age without cognitive impairments. There are driver assessment and rehabilitation programs available that can help drivers stay on the road safely. The AARP driver safety program is the nation's first and largest classroom refresher course designed for drivers 50 and older.

National research shows that approximately 21% of Americans age 65 and older don't drive. On any given day 50% of these non-drivers stay at home partially because they lack transportation options. While we are living longer, loss of mobility may translate into isolation and dependence due to loss of connection with the community at large.

in communities designed to separate land uses, keeping residential areas separate from business and commercial usage. Our vehicles are often the crucial link between where we live and where we work, play, consume, entertain and generally connect with what matters in our lives.

Local options for those who don't drive include public transportation (SCAT and SCAT Plus) taxis, transport services, friends and local volunteer driver programs. Some of the volunteer drivers from FISH ride programs have been driving people to appointments in the community for fifteen to twenty years. By their own account, these drivers are reaching the point where they are less comfortable behind the wheel, and will soon need someone to drive them to appointments in the future.

Sarasota County Area Transit (SCAT) and SCAT-Plus, the complementary para-transit service.

SCAT added fixed routes and increased frequency of service. SCAT-Plus is based on criteria of "disadvantaged" which means a disability or circumstance that prevents a rider from using the fixed-route system.

A person may have to stop driving, yet not meet the full criteria for SCAT-Plus. Yet often, the very circumstance that prevents one from driving also prevents easy usage of the fixed route system.

One observation likens the privacy of a car to that of a home, and the public space of a town square to that of public transit. Community members continued to ask for other transportation options, if they can no longer drive. With over 48,000 registered drivers age 75+ in Sarasota County, it is imperative that we expand the continuum of transportation options available. There is no single program or service that can solve all the transportation needs.

ITNAmerica

The Independent Transportation Network was one option that caught community interest. This model is a community-based alternative transportation service for seniors and the visually impaired. Using a system of volunteer and paid drivers, rides are provided in regular vehicles for any destination within a prescribed geographic area. The door-to-door service is usually available 24 hours a day, 7 days a week. Riders establish a transportation account and credits are drawn to pay for the ride. ITNAmerica provides proprietary software that matches riders with drivers, allows for shared rides at a discount, and handles the billing and credits. This program relies on a broad base of community support including contributions from the rider, other individuals, businesses and philanthropic organizations. It specifically excludes public dollars as an ongoing funding source and therefore does not compete with public transportation programs for limited state and federal dollars.

SCOPE convened a citizen workgroup to explore interest and brought together key community leaders to examine the criteria for an ITN affiliate program. The purpose was to determine if this model appears suitable in Sarasota County, based on our demographics, community support and volunteer driver resources. There was significant interest by local leaders and ITN America believed that our community had the demographics, the promise and potential to develop a successful ITN affiliate.

ITNSarasota

With start-up funding provided by The Community Foundation of Sarasota County, Inc. made possible by the James Franklin Warnell & Dorothy J. Warnell

“Elderly seniors who do not drive can find their entire lives reduced to a maddening stillness.”

*Letter to the Editor
Sarasota Herald-Tribune
September 17, 2006*

Fund and JFCS agreeing to serve as the sponsoring agency, the affiliation agreement with ITNAmerica was signed in August, 2008, and Dr. Tanice Knopp was hired as ITNSarasota Executive Director in October of 2008. The mission of ITNSarasota is “to provide a community-based, community-supported, economically viable and consumer-oriented, quality transportation service for seniors”. (ITNSarasota.org)

Recommended ways to participate include:

- Volunteer to drive
- Become a donor
- Become a member rider
- Trade or donate a car
- Become a corporate sponsor or donor
- Volunteer with fundraising events
- Volunteer in the ITNSarasota office

Volunteer Driver Liability

State legislation passed a new law in 2007 providing liability protection for volunteer drivers. Insurance companies can no longer increase premiums on the basis of an insured being a volunteer driver or receiving ride credits for driving (considered a form of reimbursement.)

Wellness & Active Living

Successful aging has been described as the absence of disability and disease, high mental and physical function and active engagement in life.³¹

Successful Aging

Avoiding Disease



Engagement

Mental & Physical
Function

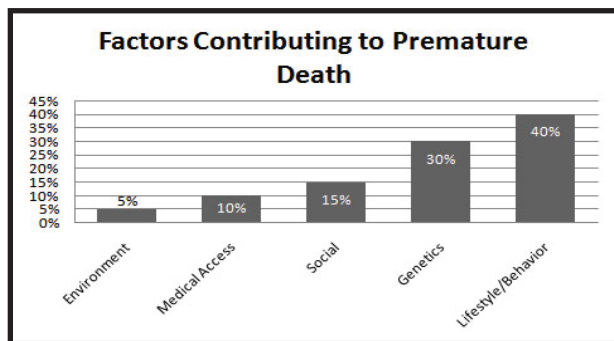
The choices we make every day as individuals have great impact on our overall wellness. Research shows that of the factors that contribute to premature death, lifestyle and behavior account for a staggering 40%.³² This tells us that personal choices regarding what we eat, what we do and how we behave have the biggest influence on our health.

For example, one makes a choice to be physically active. Research shows that one is never too old to exercise and that exercise can help reverse the frailty of advanced age.³³ Exercise types include aerobic, strengthening, flexibility and balance. The saying “Use it or lose it” is true of exercise for the mind as well as exercise for the body. Keeping the brain active and engaged is as important for successful aging as keeping the body active. Ballroom dancing has been shown to have the greatest benefit in the reduction of risk for Alzheimer’s disease and other

dementias since it exercises both the body and the mind.³⁴

As one gets older our capacity to learn doesn’t diminish and new brain cells continue to form throughout life. In the *Mature Mind*, Dr. Gene Cohen states that “The brain is continually resculpting itself in response to experience and learning.”³⁵ National research continues to show that learning helps us stay strong as we get older. Learning can benefit us in many ways - physically, intellectually, emotionally, spiritually and socially.

Recent groundbreaking neuroscience research demonstrates that older brains have an easier time with problem-solving thanks to “cognitive templates,” or mental roadmaps based on prior experiences that can be tapped to address new challenges. In other words, people do great things in their 60s and 70s not in spite of their age, *but because of it*.³⁶ So keeping one’s mind sharp and “exercised” has potential benefits for the larger community as well.



Source: Evans and Stoddard & McGinnis, Russo, Knickman, 2002, *Health Affairs*, 21,3,83

We envision a community that celebrates and creates a culture of wellness and active living and where there is awareness of issues important to optimal aging.

³¹ *Optimal Aging*, Dr. Kevin O’Neill, presentation May 2006

³² *Innovations in Community Health*, Tyler Norris, April 2006

³³ *Optimal Aging*, Dr. Kevin O’Neil, presentation May 2006

³⁴ *Optimal Aging*, Dr. Kevin O’Neil, presentation May 2006

³⁵ Dr. Gene Cohen, *The Mature Mind*

³⁶ Dr. Gene Cohen, *The Mature Mind*

Successful aging may be better realized by achieving balance across the dimensions that collectively create overall wellness. The dimensions of wellness are broadly categorized as:

- Physical
- Emotional
- Intellectual
- Social
- Spiritual
- Purposeful³⁷ (*see Appendix III for further detail*)

These dimensions are dynamic and are not isolated from each other. Improving one can improve another. A wide range of personal choices contribute to these dimensions including lifelong learning, creative activities and meaningful engagement in the community.

The term “creativity” has many different definitions and connotations. Creativity has been described as “the process of bringing something new into being.” The “something new” could be an original idea, a product, or a perspective, and is not limited to the artistic realm. Research shows that engaging in the creative process contributes to optimal physical and mental health as we age by helping us maintain a good outlook and a sense of well-being. New scientific studies indicate that participation in artistic or creative activities results in significantly fewer falls and less hip damage, fewer doctor’s visits, diminished use of medication, diminished vision problems, and significantly less loneliness and depression. Creativity has a positive influence in helping us cope with problems, emotionally bounce back from them, and enriches our relationships.³⁸

Current trends indicate that the notion of “retirement” has shifted and will continue to shift as the baby boomers begin to retire. While enjoyment of leisure pursuits are part of retirement, retirees look as well for meaningful community involvement and want to be challenged in ways beyond traditional volunteer opportunities.

Retirement gives one the freedom to work, both paid and unpaid, in ways that matter to the individual.³⁹ Having a sense of purpose is one of the dimensions of wellness yet connecting with opportunities is often a challenge. Often new and prospective retirees wish to explore new professional opportunities but often lack the guidance and community resources that would assist them in learning new skills or in discovering opportunities for employment and entrepreneurship.

“I learned that even though we age, if we continue to participate in life, we will be healthier, happier and enjoy our Golden Years even more so.”

- Elinor Greenberg, participant

To achieve this, individuals, organizations, government, and businesses should:

- **Promote the importance of healthy living** through a broad community education campaign that encourages people to be physically and mentally active, engaged in the community, and connected with their neighbors. Increase public awareness, interest, and understanding of these issues. Understanding is the first step toward making better choices.
- **Develop employer-based programs** such as incorporating flexible scheduling to allow for exercise, hosting small forums and workshops on wellness-related topics, and distributing general information on the benefits of healthy living

Develop intensive research initiatives that use our unique demographics and community as a living laboratory to test and develop innovative ways to encourage wellness by creating new products, services and ways to engage the community.

³⁷ *Optimal Aging*, Dr. Kevin O’Neil, presentation May 2006

³⁸ Dr. Gene Cohen, *Mature Mind* and his presentation, Feb. 2007

³⁹ Marc Freedman, *Encore*

Next Chapter Initiative

These are different in every community, often spearheaded by a community-based organization such as the public library or community college. The program provides connection and direction by helping adults explore their options, discern their passion and connect with paid employment and volunteer opportunities to fulfill their encore phase.

Source: *Encore*, Marc Freedman, p. 173

Partnership of Lifelong Learning Enthusiasts (Poll-e)

This partnership is an informal coalition of lifelong learning organizations and programs in Sarasota County. The partnership develops ways to spread the word about the wide variety of learning opportunities for older adults. To date this group has:

- Developed a logo and created a link on the Library website to “Lifelong Learning” programs and organizations <http://suncat.co.sarasota.fl.us/lifelonglearning.aspx>

Experience Corps

More than 2000 retirees in Experience Corps are working with 20,000 children across the nation to help succeed in school. Corps members are paid a small stipend for working 15 hours each week.

Source: *Encore*, Marc Freedman, p. 170

“...successful aging requires much-more: having adequate finances, housing that suits our physical condition, bringing balance to our life, keeping our body in shape, participating in life’s dance...and I do mean dance.”

- Jerry Meketon, participant

Conclusion

Sarasota County is positioned to be the vanguard for the rest of the country on issues and policies for a maturing population. We are currently in the throes of what will be experienced nationally and globally over the next twenty years as the largest demographic multitude, the baby boomers, begin to reach retirement age. We are already in the midst of this experience by virtue of who we are with nearly 30% of our population age 65+. Sarasota County can develop a vision and efforts to create the future will provide direction for other communities.

Aspects of this vision include the following:

- A culture that values the contributions of each person no matter what their age
- Communities are more livable through the application of design principles such as walkability, compact design, mixed use, housing choices and a variety of transportation options
- New housing stock routinely incorporates universal design principles
- Certified Aging in Place Specialists (CAPS) to retrofit existing homes are readily available
- Zoning regulations that support creative housing options for older adults
- Expanded transportation options for older adults who no longer drive
- A blended workforce with employees from all age groups with creative approaches to address the varying degrees of challenges to make work a positive and fulfilling experience for all
- New or expanded businesses that test, manufacture, or distribute new products and services for optimal aging
- Neighborhoods are vibrant with neighbors working together to make their neighborhood a better place. Nonprofits and local institutions are collaborative partners with the neighborhoods
- A broad range of outlets for information about services, including print, internet, and neighborhoods
- Caregivers are supported by employers, businesses and the community
- Strong and seamless connections among programs for life stage planning, lifelong learning and cultural opportunities, creative endeavors, meaningful volunteerism and workforce opportunities

The impacts of a proportionally older population are numerous and substantial. The goals competing for our attention require focus and vigilance. It is important to translate what we know into practical applications (public policy, programs, initiatives, collaborations, ventures, etc.) The community needs to maintain the focus, nudge direction and provide oversight. There has been interest, dialogue and steps taken to explore the development of an institute to keep our community momentum and connect Sarasota's thinking and preparation with the rest of the nation.

Sarasota Institute for the Ages (SIA)

The broad goals of the institute would be to impact the nation through our own community's experience as a living laboratory, applying leading edge thinking to transform the community and individuals. This work includes:

SCOPE is working to create a national institute called The Sarasota Institute for the Ages (SIA), which will focus on addressing how the community responds to the aging population and the demographic shift. As the oldest large county in the nation, Sarasota is ideally suited to be a living laboratory for such pursuits, given its projected growth, its existing services and history of community involvement, entrepreneurial spirit and support of social services. The institute's focal point will be on rethinking the way individuals make transitions from one life stage to the next AND how communities adjust and evolve to take their

demographic realities into account. The intention is to be the big stage for thinking and an economic driver for Sarasota County.

The goal of the SIA is to undertake bold initiatives that will promote inquiry, reflection, and research about ways to optimize a community's responses to significant and ongoing demographic shifts in the U.S. as the population ages. Such approaches will foster policy development and will generate actions that can be adopted by communities throughout the country. The intent is to identify and create actions that enhance the quality of life in the community and among its services and residents of all ages.

There are 4 major components: Think-Tank, a "place" where scholars, researchers, artists, practitioners, and citizens will maintain active dialogue, a 'Do' Tank to execute and implement ideas from the "think tanks" while systematically providing feedback, an Age Force, which will maintain annual and ongoing dialogues among employers, HR professionals, discussing techniques and initiatives special to corporate, small business, nonprofits, and governments, and Training and Consulting to share its experiences and knowledge base in addition to consulting other communities and their residents.

Appendix I

Learning Opportunities

Initial Conversations

Eight community listening sessions were held throughout Sarasota County to gather hundreds of ideas which were shared at the first Community Assembly held in April 2005.

Community Assembly

April 2005

This initial community assembly, Exploring the Possibilities Together, shared what had been gleaned from listening sessions, and connected citizens to the topics on aging they wished to further explore. The outcome of the assembly was shared at the national level with the White House Conference on Aging.

Neighborhood Connections

July 2005

Julie Morris, co-director of the Environmental Studies program at New College and Assistant to the Provost, guided a discussion of neighborhood and community. Julie taught a college course “Florida as Home” which addresses the concepts of sense of place, neighborhood, community immigration and retirement in the context of Florida. Participants discussed the context and potential role of neighborhoods in the aging process.

Healthcare & Supportive Services

August 2005

Cathy Emmett, Regional Director, Senior Friendship Centers, discussed the role of the caregiver, training needs, opportunities and challenges. Caregiver connections was a primary focus of this action team.

Community Design & Land Use

August 2005

Sarasota County’s aging population possesses unique needs when it comes to planning. Anne McClung, Sarasota County Planning Director and Matt Lewis, Sarasota County Senior Planner, discussed how our community’s aging population fits into the plans for Sarasota County. They focused on issues such as the Sarasota 2050 Plan, Urban Area Redevelopments, increased density, and Zoning.

Economic & Workforce Issues

August 2005

Beverly Stockton, Special Projects Director, Suncoast Workforce Board, discussed workforce issues related to seniors and advancing baby boomers. She shared information about the 21st Century Workforce Study and strategies related to a senior workforce.

Lifespan Design

August 2005

Julie Cotton, Ph.D., lifespan design expert and author of “A Roomful of Possibilities” and designer/author Carolyn Ambuter, shared how design can enable us to remain in our homes as we age, and enhance our sense of independence, safety and comfort.

Mobility & Transportation

August 2005

Susan Samson, Project Coordinator for the Area Agency on Aging of Pasco-Pinellas County, discussed her current work on a senior driver intervention project for the Florida Safety Resource Center. A variety of services are provided, intended to prolong the ability of seniors to drive safely. These services include driving assessments, mobility counseling and social service referrals.

Understanding Age Bias

September 2005

Jane Roberts, Ph.D., assistant professor at USF conducted two workshops on age bias, often called ‘ageism’. Participants discussed the differences and similarities among people of all ages and gain a better understanding of aging in our local communities.

Arts & Community Engagement

September & October 2005

Participants in the initiatives, Aging: The Possibilities and Race & Cultural Relations participated with local artists in several conversations on the role of art in community building.

Community Data: Naturally Occurring Retirement Communities

October 2005

Kathy Black, Ph.D., assistant professor at USF, presented community data from the local NORC (Naturally Occurring Retirement Community) needs assessment survey.

Arts, Creativity & Aging

October 2005

Larry Polivka, Ph.D., Assistant Director of the School of Aging Studies, and Director, Florida Policy Exchange center on Aging, USF, spoke on arts, creativity and aging.

Community Assembly

November 2005

Nancy Schlossberg spoke on Mattering, the need for individuals to feel that what they do matters in their community. This assembly provided updates to the community and was designed to bring new members into existing action teams to develop next steps.

Community Assembly

May 2006

Kevin O’Neil, MD, presented The Six Dimensions of Wellness and participants reflected on **their** personal commitment to themselves and the larger community regarding wellness.

**Cohousing Community Learning Sessions
October & November 2006**

This informal program provided information and discussion on the concept of cohousing. Van Deist and Jono Miller shared what they have learned at two national conferences. The website, www.cohousing.org notes, “Cohousing communities combine the advantages of private homes with the benefits of more sustainable living, including shared common facilities and ongoing connections with neighbors. These intentional neighborhoods, created and managed by residents, offer an innovative solution to today’s environmental and social challenges.”

**Community Assembly
October 2006**

Fran Carlin-Rogers presented *On the Move: Mobility Options and Opportunities* and participants shared their ideas for expanding the local transportation alternatives to driving ones car.

**Aging: The Possibilities Documentary Film Premiere
November 2006**

SCOPE partnered with producer and filmmaker Kim Stocker and The Education Channel to create a video that highlights the community’s focus on the topic of aging and local best practices already making a difference. The film was run on The Education Channel after three community showings.

**Lifelong Learning
April 2007**

A volunteer committee worked in 2006 and 2007 to create a publication on local lifelong learning opportunities, that was published by the Herald-Tribune Media Group.

**Community Assembly
September 2007**

Judy Goggin, senior vice president of Civic Ventures, presented *Are You Ready? The Changing Face of Retirement, Work and Service*. Participants reflected on creative ways to accommodate a changing workforce and explored actions they were inspired to take.

May 2008

SCOPE, Selby Public Library, Senior Friendship Centers and Sarasota News & Books hosted a conversation with critically-acclaimed author Dudley Clendinen to discuss his book “A Place Called Canterbury.”

Appendix II

The Winter Forum on Aging has become an annual event in Sarasota County with a reputation for challenging our thinking individually and as a community.

Winter Forum on Aging 2007 Discovering our Potential

Internationally-known expert on aging and retirement, **Gene Cohen, MD., Ph.D.**, discussed a wide range of groundbreaking new research on aging, creativity, learning and quality of life during retirement. Following Dr. Cohen, a local panel of experts discussed the direction that Sarasota County should move to make the most of the quality of life for our current older residents as well as to prepare for the unprecedented demographic shift as the Baby Boomers begin to turn 60. The afternoon concluded with audience-based roundtable conversations on the possibilities for Sarasota County.

Dr. Cohen highlighted the idea of Sarasota being a community for all generations, and encouraged those listening to actively try to connect with younger people. The benefits are mutual, he said. “The “now” generation is learning from experience, and the older group realizing their potential as an alive and important part of the Sarasota community.”

Winter Forum on Aging 2008

Actively creating a great retirement experience – both as individuals and as a community – was the topic of conversation at the **2008 Winter Forum on Aging**. Ronald J. Manheimer, PhD, executive director of the North Carolina Center for Creative Retirement (NCCCR), shared his experience and offered insights into the unique challenge of engaging a new generation of retirement-aged people. Founded in 1988 as part of the University of North Carolina Asheville, the NCCCR features three components of great retirement: lifelong learning, leadership and community service opportunities.

“Retirement is a complex process, not a single event,” said Ron Manheimer explained. “It is filled with transitions. People retire and go back to work -- maybe multiple times. They use education to open up new interests, meet new people. They’re going off for adventure travel. Volunteering has become a way to give back, to make new friends, and to learn about an aspect of your community.” This, he emphasized, is why having new ways of engaging retirement-aged adults is so important – retirement has changed and with it, it is changing people, organizations and communities as well.

Winter Forum on Aging 2009

The broad purpose of the **2009 Winter Forum on Aging** was to help the community “move the ball” on topics related to aging successfully in Sarasota County. The program’s focus was to inspire, stimulate, and educate the community about cutting edge programs and practices for baby boomers and older individuals.

This program explored the connections and possibilities around three themes:

1. the untapped creative power of the mature brain
2. the community harnessing of this creative energy
3. the individual action needed to make the most of life experiences past the traditional retirement age of 65

Featured speakers Marc Freedman and Susan Perlstein tackled cutting edge thinking on aging and how it relates to our community. Marc Freedman spoke on how the current economic crisis that the nation is facing impacts baby boomers as they approach or enter retirement and move to the “second half of life”. Mr. Freedman addressed the untapped resources of the retirees. This encouraged people to re-evaluate how to spend their time volunteering, learning something new, and determining where their passion lies. Susan Perlstein addressed the importance of engagement, and how it is transforming how we participate in life after retirement and on the science behind the increased creativity of the brain as it matures. This is a powerful example of why people should try new things, venture out, and use their creative capacity.

Read highlights and summaries of roundtable discussion at
www.scopexcel.org

Appendix III

Six Dimensions of Wellness

Kevin O'Neil, MD, presented *The Six Dimensions of Wellness* and encouraged reflection on one's personal commitment as well as to the larger community regarding wellness. Much of the research shows that, to a great extent, personal behavior and choices have the largest impact on an individual's wellness

Physical

Maintaining a healthy body is through good nutrition, regular exercise, avoiding harmful habits, making informed decisions about health and seeking medical assistance when necessary.

Emotional

The ability to understand ones own feelings, accept one's limitations, and achieve emotional stability.

Spiritual

The sense that life is meaningful and has a purpose; the ethics, values and morals that guide us and give meaning and direction to life.

Intellectual

A state in which one's mind is engaged in lively interaction with the world around you. It involves continued learning, problem solving, and creativity.

Purposeful

The ability to contribute one's unique skills/talents to work that is meaningful and rewarding. This includes activities that allow one express their values through involvement in paid and non-paid activities that are personally rewarding and make a contribution to the well-being of the community at large.

Social

The ability to relate well to others, both within and outside the family unit. It encourages contributing to a healthy community by supporting a healthy living environment and initiating better communication with others.

Source: Based on the Six Dimensions of Wellness, National Wellness Institute, Inc.

References

Resource People

Carolyn Armbuter

Kathy Black, Ph.D.
Assistant Professor, School of Social Work
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Robert Black
Certified Aging in Place Specialist

Gene Cohen, M.D., Ph.D.
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Glossary of Terms

APCA: Amaryllis Park Civic Association

CAPS: Certified Aging in Place Specialist

EDC: Economic Development Corporation

FHBA: Florida Home Builders Association

FISH: Service Volunteer Driver Program

FVC: Friendship Volunteer Center

HBA: Home Builders Association

ITN: Independent Transportation Network

JFCS: Jewish Family and Children's Service

LEED: Leadership in Energy and Environmental Design

NAHB: National Association of Home Builders

NORC: Naturally Occurring Retirement Community

NRC: Nonprofit Resource Center

Poll-e: Partnership of Lifelong Learning Enthusiasts

SCAT: Sarasota County Area Transit

SFC: Senior Friendship Centers

SIA: Sarasota Institute for the Ages

UNDP: United Nations Development Program

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