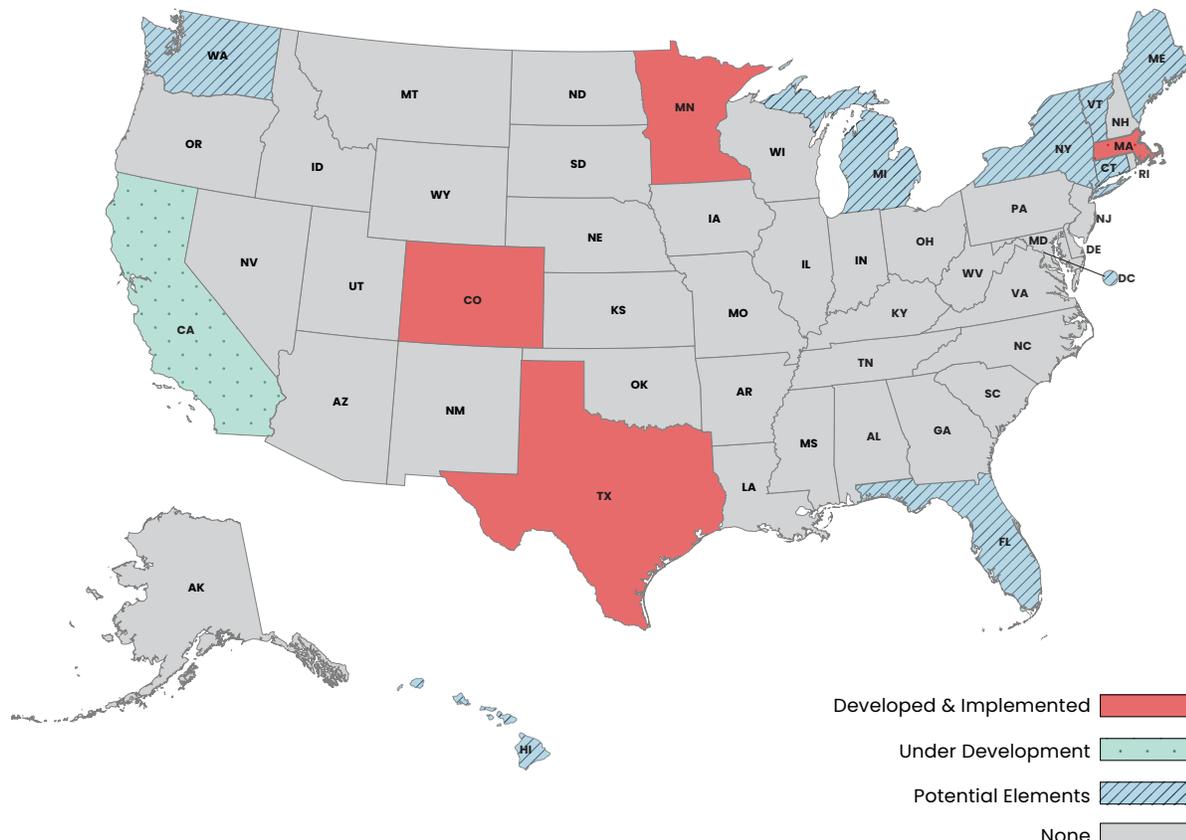


Building a Master Plan for Aging: Key Elements from States Planning for an Aging Population

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This brief highlights states that have a Master Plan for Aging, examples of key elements, and discusses how states without a Master Plan can get started.

Master Plan for Aging Activity Across States



Overview

The United States will reach a turning point in 2030 where 1 in 5 Americans is age 65 and older, growing to 1 in 4 by 2060.¹ The older adult population is increasing and people are living longer, but have fewer caregiver resources than previous generations to provide support as needs and abilities change.² States, localities, and communities will experience greater demand for services and opportunities for innovation, both of which require farsighted investments in planning.

The current [COVID-19](#) pandemic provides a powerful example of these realities, dramatically underscoring the increased need for a thoughtful and integrated community-based health and long-term services and supports (LTSS) infrastructure at the same time governors are coping with serious fiscal constraints. This conundrum is shining a bright light on both challenges and opportunities for reshaping how services are delivered to older adults, those aging with a disability, and their family caregivers.

States set policy and allocate resources that govern how care and services are organized, delivered, and regulated in all aspects of daily life that impact older people and adults aging with a disability. According to the [AARP LTSS State Scorecard](#), the highest-performing states have one thing in common: a commitment to a comprehensive plan that guides policy choices and investments with the goal of ensuring that their aging populations can live with dignity in the settings of their choice. As roughly 70 percent of Americans age 65 and older will need at least some help as they age, forward-thinking states have taken the bold step to develop a clearly articulated Master Plan for Aging.³

This brief offers a definition of *Master Plan for Aging*, and highlights work being done in states to develop and implement a Master Plan. Drawing from the work in these states, the brief delineates key leadership and structural elements for developing a successful Master Plan while addressing cross-cutting themes to guide the planning process. Finally, the brief shows how states without a formal Master Plan effort may already have state action in one or more of those key elements.

What Is a Master Plan for Aging?

A Master Plan for Aging is a blueprint that: a) includes planning for 10 or more years; b) is generally led by a governor with other executive and legislative leaders; and c) is developed to guide restructuring of state and local policy, programs, and funding geared toward aging well in the community. A successful Master Plan joins the public, private, and independent sectors

in renovating systems-based solutions that touch all major areas of the aging life experience (e.g., health, human services, housing, transportation, consumer affairs, employment and income security, business development). It brings visibility to population aging priorities using data and stakeholder input, establishing measurable outcomes to address those priorities while acknowledging infrastructure differences (i.e., transportation, internet, and cell service) across urban and rural localities. A Master Plan is iterative, to be reviewed and updated over time.*

FIVE ELEMENTS FOR PLAN SUCCESS



Examples of State Master Plans for Aging

Several states are in various stages of implementing Master Plans. Table 1 outlines how the states of Colorado, Massachusetts, Minnesota, and Texas have implemented planning processes that reflect a variety of approaches to addressing system change.

California has also committed to developing a Master Plan, with elements of the plan under development highlighted in Table 2. Some of these states have also joined the [AARP Age-Friendly Network](#), demonstrating their interest in improving the quality of life for people of all ages through the adoption of policies and programs that address walkable neighborhoods, transportation options, access to key services, support for community engagement, and housing that is affordable and adaptable.

* All states are required by the [Administration for Community Living](#) to submit a State Plan exclusively focused on Older Americans Act funding limited to nutrition and modest community-based support programs. The State Plan goals and outcome measures could be built into or coordinated with similarly focused elements of a broader Master Plan for Aging.

Each Master Plan varies in regard to the range of issues addressed, ranking of priorities, stakeholder involvement, target population, and the extent to which there are accountable and measurable outcomes. Each state's process was driven by state-level leadership, with specific examples below.

- Colorado's [Strategic Action Plan on Aging](#) is led by a planning group of state and local policymakers, as well as providers and advocates. Updated every two years, the plan addresses a range of issues from age-friendly communities, housing, transportation, and workforce. Colorado engaged in extensive stakeholder outreach through its "Conversations on Aging" project that helped inform the planning process.⁴
- Massachusetts' [Council to Address Aging](#) was developed to engage stakeholders from the public and private sectors, and leverage technology and innovation. The blueprint addresses economic security, health care, LTSS, community engagement, and has led to the state acquiring AARP Age-Friendly status. The blueprint is iterative with the Council meeting to review outcomes twice a year.⁵
- Minnesota was one of the earlier states engaged in system planning through its [Aging 2030](#) initiative, with goals centered on a range of issues including redefining work and retirement; supporting caregivers; and enhancing the use of technology, among others. Building off of this and other initiatives, [MN2030 Looking Forward](#) seeks to engage stakeholders in setting LTSS and other priorities that support the life span of all Minnesotans.⁶
- Texas has been engaged in formal systems planning for an aging population for over a decade through the [Aging Texas Well Advisory Committee](#). The *Aging Texas Well Strategic Plan* is reviewed biennially, and has evolved over time to address current issues and future needs. The goals and activities are developed through analysis of current state policy and data. State staff report updates at quarterly advisory committee meetings.⁷
- California's current Master Plan process has been led by the state in consultation with a Stakeholder Advisory Committee and topic-specific subcommittees including representation from older adults, people with disabilities, advocates, and service providers. [The Long-Term Services and Supports Subcommittee](#) submitted a report and recommendations in May 2020. The Stakeholder Advisory Committee is expected to deliver recommendations in the fall, with the governor releasing the Master Plan for Aging by December.⁸

Table 1: Elements in States with Established Master Plans for Aging

State	Leadership	Rational Priorities	Comprehensive	Stakeholder Involvement	Accountability	AARP Age-Friendly State
Colorado Colorado Strategic Action Plan on Aging, 2019	HB15-1033 created the Strategic Action Planning Group on Aging, which includes: <ul style="list-style-type: none"> • State departments; • Counties; • Providers; and • Advocates. 	Uses data to establish goals with recommendations, clearly outlining agencies and departments involved, but has no specified ranking of priorities.	Goals include: <ul style="list-style-type: none"> • Develop age-friendly communities; • Increase affordable and accessible housing; • Review Senior Property Tax Exemption; • Develop supportive and engaging workforce infrastructure catered to older adults; • Improve transportation options, with a focus on accessibility and paratransit; and • Promote health and wellness. 	Extensive stakeholder outreach called “Conversations on Aging.”	Initial 2016 report was updated in 2018 and 2019. The Planning Group will undergo a sunset review in 2022. No measurable outcomes.	Yes
Massachusetts Aging in Massachusetts	Executive Order 576 created the Governor’s Council to Address Aging in Massachusetts, and called for a plan to make Massachusetts the most age-friendly state for people of all ages.	Recommendations are supported by research, data, and stakeholder input.	Areas of opportunity: <ul style="list-style-type: none"> • Improve economic security; • Ensure access and affordability of health and supportive services; • Promote age-friendly communities; and • Facilitate connection and engagement. 	Working meetings, statewide listening sessions, and public comment resulted in input from more than 500 Massachusetts residents.	A progress dashboard with recommendations and action steps is reviewed twice a year and shared publicly.	Yes

Table 1: Elements in States with Established Master Plans for Aging (Continued)

State	Leadership	Rational Priorities	Comprehensive	Stakeholder Involvement	Accountability	AARP Age-Friendly State
Minnesota MN 2030: Looking Forward	<p>Minnesota Department of Human Services launched <i>Transform 2010</i> in partnership with the Minnesota Board on Aging and Department of Health.</p> <p>The Initiative was later renamed <i>Aging 2030</i> and built upon to create <i>MN 2030</i>.</p>	<p>Uses data to inform goals. Reported on respective state department websites.</p>	<p>Goals include:</p> <ul style="list-style-type: none"> • Redefine work and retirement; • Support caregivers of all ages; • Foster communities for a lifetime; • Improve health and long-term care; and • Maximize the use of technology. 	<p>Minnesota Board on Aging and state departments of Health and Human Services convened stakeholder meetings across the state. Online platform to submit ideas.</p>	<p>No measures were developed specific to <i>Transform 2010/Aging 2030</i>. The state adopted performance measures related to specific goals for programs serving people with disabilities and older adults, which are updated annually.</p>	No
Texas Aging Texas Well Strategic Plan 2020-2021	<p>Executive Order RP-42 mandates the plan be updated every two years under the guidance of the <i>Aging Texas Well</i> (ATW) Advisory Committee.</p> <p>All affected agencies and other public entities are required to cooperate fully with implementation.</p>	<p>Use analysis of state policy and data to establish goals and activities.</p>	<p>Priority issue areas:</p> <ul style="list-style-type: none"> • Active engagement, volunteerism, companionship; • Housing; • Ageism; • Community readiness/capacity; • Emergency response; • Poverty; • Program service coordination; and • Grandparents and other older relatives raising grandchildren. 	<p>The <i>Aging Texas Well</i> Advisory Committee – comprised of academics, providers, community organizations, and consumers – meets quarterly to receive updates from state staff and make recommendations.</p>	<p>The plan is updated biennially.</p> <p>No measurable outcomes identified, however state staff report progress at quarterly advisory committee meetings.</p>	No

Table 2: Elements in States with a Master Plan for Aging Under Development

State	Leadership	Rational Priorities	Comprehensive	Stakeholder Involvement	Accountability	AARP Age-Friendly State
California ENGAGECA.org	Executive Order N-14-19 calls for a Master Plan for Aging to serve as a blueprint for state government, local communities, private organizations, and philanthropy to work toward an age-friendly California.	Goals are supported by research, data, and stakeholder input.	Goals include: <ul style="list-style-type: none"> • Improve access to LTSS; • Strengthen caregiver supports; • Create livable communities; • Develop opportunities for community engagement; • Increase access to high-quality, person-centered health care; • Ensure economic security; • Prevent elder abuse; and • Prepare for disasters. 	Extensive stakeholder engagement through a Stakeholder Advisory Committee, public comment opportunities, community outreach, and listening events.	The Executive Order requires data indicators with 10-year targets for implementation. Under development.	No

Cross-Cutting Themes to Guide Successful Implementation

Our review of these Master Plan efforts has also revealed cross-cutting themes that impact successful implementation. These themes include intentionally addressing equity at the start, applying and maintaining a person-oriented focus, addressing aging across the life span as we all are aging, and developing cross-sector collaborations (i.e., private, public, and independent). Tables 3 and 4 highlight how states with established Master Plans or plans in progress apply these themes.

Table 3: Cross-Cutting Themes in States with Established Master Plans for Aging

State	Equity	Person-Oriented	Aging Across the Life Span	Cross-Sector Collaboration
Colorado	While attention to social determinants of health is evident, a focus on equity is not clearly communicated.	The plan is accessible and presents goals and recommendations in a digestible and user-friendly format.	Aims to plan for a “Colorado for all” by: <ul style="list-style-type: none"> • Promoting health and wellbeing; • Fostering self-sufficiency; and • Providing livable communities. 	The Planning Group is comprised of private sector, state department, higher education, and consumer representatives.
Massachusetts	Applied principles of equity and cultural competency to recommendations.	Uses age-friendly, asset-based language.	Identified values include: <ul style="list-style-type: none"> • Aging is an asset, and something you have to plan for; and • Embedding aging in all policies benefits residents of all ages. 	The Council is comprised of public, private, and philanthropic sectors, intentionally engaging the business and tech communities. Cross-sector engagement to identify goals resulted in solutions from outside state government.
Minnesota	Includes value statements addressing equity and justice.	A common thread throughout the planning has been to ensure older Minnesotans live fulfilling lives. Public input gathered through Community Conversations informed strategic planning.	Vision and values express a desire for Minnesota to be a great place to grow old where people of all ages are valued and included in society.	Appears to be primarily state driven. Collaboration with other sectors is not clearly evident.
Texas	The Health and Human Services Commission (HHSC) plans to review state policies for aging diversity and cultural humility.	<i>Age Well Live Well</i> campaign resources such as toolkits, fact sheets, and infographics are accessible. Improving awareness regarding aging issues through specialized workshops and promotion of marketing materials.	Improving outreach to underserved communities through the <i>Texercise</i> initiative and <i>Age Well Live Well</i> campaign, as well as increasing overall public awareness through the <i>Texas Talks</i> campaign.	Appears to be driven by HHSC with input from an advisory committee made up of individuals and providers familiar with aging. Cross-sector collaboration is not readily evident.

Table 4: Cross-Cutting Themes in States with a Master Plan for Aging Under Development

State	Equity	Person-Oriented	Aging Across the Life Span	Cross-Sector Collaboration
California	An Equity Work Group was created to review the Master Plan content and recommendations and provide feedback. The work group created an equity tool for guidance.	Input gathered from individuals about what matters most as they age was used to guide the Master Plan process. Recommendations have been developed with the person's experience at the forefront, and with updates on the planning process provided in easy to understand language through a variety formats.	It is a plan for an aging California, recognizing all Californians are aging.	The public, private, and philanthropic sectors have been engaged in the planning process. The intent is for the Master Plan to provide a blueprint for each of the sectors to engage.

Start with Existing Capacities as a Pathway to Develop a Master Plan for Aging

Several states have components of one or more elements of a Master Plan, which can be used as a starting off point to engage in a broader planning process to meet the needs of their aging population. Examples include state dashboards reporting program data and outcomes, a variety of initiatives addressing the needs of older adults, and/or participation in AARPs Age-Friendly Network—all of which can contribute to and be included in a Master Plan. Table 5 highlights states that do not have a Master Plan, but do have one or more elements that could be used as a pathway to developing a Master Plan.

Table 5: States with Elements that Could Contribute to a Master Plan for Aging

State	Leadership	Rational Priorities	Comprehensive	Stakeholder Involvement	Accountability	AARP Age-Friendly State
Connecticut	Connecticut General Statutes Title 17B. Social Services Chapter 319Y. Long-Term Care (LTC) authorizes a planning committee of state administrative staff and legislators to develop a LTC plan .	Establishes goals with short-term and long-term recommendations and has no specified ranking of priorities.	Priorities focus on provisions for LTSS and rebalancing.	LTC Advisory Council comprised of providers, consumers, and advocates. Council provides input to LTC Planning Committee.	Plan released every three years, and outlines goal progress under two themes: 1. Rebalancing home- and community-based services (HCBS)/ institutional LTSS 2. Rebalancing private/ public funding for LTSS.	No
District of Columbia	Initiatives led by the mayor.	Some goals are supported with data.	Focus areas include: • Accessible outdoor spaces and buildings; • Transportation; • Housing; • Community engagement; • Health Services; • Emergency preparedness; • Elder abuse; • Caregiving; and • Financial security.	Age-Friendly Task Force includes representation from public, private, and nonprofit sectors; think tanks; media; and local universities. Community members can contribute to implementation as “Agents of Change.”	Age-Friendly DC progress report includes outcomes dashboard.	Yes
Florida						Yes

Table 5: States with Elements that Could Contribute to a Master Plan for Aging (Continued)

State	Leadership	Rational Priorities	Comprehensive	Stakeholder Involvement	Accountability	AARP Age-Friendly State
Hawaii		Geographic Information System database and maps inform and track priorities for Age-Friendly Honolulu.			Executive Office on Aging program performance dashboard provides longitudinal data.	No
Maine	LD 301 encourages Age-Friendly communities (signed into law). LD 1733 calls for a comprehensive state plan, and establishes the Director of Aging position to coordinate the planning process (bill held over).					No
Michigan						Yes
New York	Executive Order No. 190 formalized Health Across All Policies/ Age-Friendly NY, requiring state agencies/ departments to incorporate aging-friendly priorities into planning, regulation, policymaking, and procurement.	Health Across All Policies/ Age-Friendly NY Roadmap Report highlights evidenced-based initiatives.	Suggested goals state agencies could address include: <ul style="list-style-type: none"> • Wellness; • HCBS infrastructure; • Caregiver support; • Age-friendly communities; • Access to health and LTSS; and • Civic engagement. 	Requires each state agency to appoint a coordinator as a liaison to the Steering Committee. No indication of community stakeholder involvement.		Yes

Table 5: States with Elements that Could Contribute to a Master Plan for Aging (Continued)

State	Leadership	Rational Priorities	Comprehensive	Stakeholder Involvement	Accountability	AARP Age-Friendly State
Vermont	H611 calls for development of a Master Plan process.	Uses a variety of reliable data sources to develop outcomes.	Multiple priorities in the Department of Disabilities, Aging and Independent Living Scorecard: <ul style="list-style-type: none"> • Health; • Employment; • Caregiver support; • LTSS; • Transportation; • Community engagement; • Housing; • Workforce; and • Safety. 	<i>Older Vermonters Act Working Group</i> comprised of state staff, legislators, providers, older adults, and family caregivers.	Transparent outcome dashboards that provide longitudinal data, sources, and methodologies for replication.	No
Washington	Washington Department of Social and Health Services/Aging and Long-Term Support Administration.	Aging and Long-Term Support Administration Strategic Plan: 2019-2021 establishes goals and benchmarks through a “Commitment Scorecard” that reflects the consumer’s perspective, and ranks the state on its success in transforming lives.	The plan is LTSS-focused with strategic objectives focused on the following priorities: <ul style="list-style-type: none"> • Access to HCBS; • Family caregiver support; • Community transitions; • Timely eligibility approval; • Services for people who are deaf or hearing impaired; • Assistive technology; • Quality improvement in nursing facilities and other settings; and • Protecting vulnerable older adults. 	No discernable statement about stakeholder involvement.	Washington Aging and Long-Term Supports Administration Strategic Plan metrics are updated quarterly, and allow for objectives to be updated as needed.	No

Conclusion

A Master Plan provides a blueprint for states and local communities to address what matters most to people as they age—wellness, access to services and supports, and community engagement (e.g., volunteering, employment, recreation). Often state activities aimed at planning for and addressing the needs of an aging population are fragmented, and it is often unclear to the observer how everything is interconnected. A Master Plan can be helpful in showing how these various elements come together under one platform as part of a shared vision. There are a variety of approaches a state can take to plan for an aging population in response to a state's strengths, capacity, and policy environment. Examples of the elements that make for an effective Master Plan can be found in those leading states with existing plans, as well as those taking steps toward planning. Additionally, states participating in the AARP Age-Friendly Network can use their efforts as a stepping stone to developing a broader plan.

States like California, Colorado, and Massachusetts have also found value in their Master Plan processes during COVID-19, as they have been able to tap into stakeholder work groups and relationships developed through cross-sector collaborations to respond to the needs of those most at risk. While many states have some form of stakeholder involvement, engaged leadership from the governor is a strong catalyst for implementation of a meaningful Master Plan for Aging. The beauty of a Master Plan is the opportunity for cross-sector collaborations to develop innovative solutions and shared responsibility for implementation to meet the needs of older people, adults aging with a disability, and family caregivers, today and in the future.

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