

Recommendations

Overview

In the process of developing the recommendations, distinct categories of services were identified, 1) Health, Prevention and Chronic Care, and 2) Housing, Families and Communities. Under each of these broad categories, goals and strategies were placed under subheadings, including: 1) public policy, 2) finance, 3) service provision, 4) education, 5) workforce development, 6) family and community caregiver support and development, and 7) technology. There are a total of 26 goals. Each goal has strategies and actions to assist in its implementation.

A matrix is used to present the Task Force recommendations. This matrix includes several columns that provide further information with regard to each strategy and action. On the left side of the matrix the goals, strategies and actions, are listed. On the right side of the matrix are columns with several headings. The following explains and describes those columns:

State/Fed. Policy

This column indicates if the strategy or action requires changes in state or federal government policy, and will be indicated as an “F” for federal and an “S” for state, or “F/S” for both federal and state.

State/Fed. Budget

This column indicates whether or not state or federal government funds are required to implement it with new budget resources and is similarly marked as the policy column.

State/Fed. Legislative

This column identifies whether or not state or federal legislation is required to implement the strategy or action and is marked as stated above.

Private Sector/Organizations

This column identifies whether or not the private sector needs to take the lead or at least partner with the state in implementing the strategy or action.

Lead Responsibility

This column lists the agency or branch of government that needs to take the lead in implementing the strategy or action.

Implementation Time

This column is used for estimating the implementation time of an action or strategy, whether it could be implemented in a short, intermediate or long period of time.

S = Short time to implement (1-5 years)

I = Intermediate time to implement (5-10 years)

L = Long time to implement (10+ years)

Health, Prevention, and Chronic Care

Public Policy

<p>Goal Statement: Public policy supports self-direction and autonomy with a balance between personal and public responsibility. Eliminate the expectation of impoverishment by the person, spouse or family as a condition for receiving assistance.</p>	State/Federal Policy	State/Federal Budget
<p>Strategy 1. Federal and state eligibility rules for Medicaid should ensure balance between individual responsibility and the public need.</p>	S/F	
<p>Action 1. Seek a dialogue with federal and state policy makers, advocates and consumers to examine standards for the level of assets that can be shielded by trusts for the purpose of eligibility to Medicaid.</p>	S/F	
<p>Action 2. Adopt stronger Medicaid eligibility requirements for valuation of major assets such as homes and automobiles.</p>	S/F	
<p>Strategy 2. Limit entry to the Medicaid long-term care system to Oregonians in need of safety net services.</p>	S	
<p>Action 1. Amend Oregon Revised Statutes 108.110 to stipulate use of administrative hearings in spousal support cases.</p>	S	S
<p>Action 2. Continue to develop strategies that involve appropriate consumer cost sharing.</p>	S/F	

<p>Goal Statement: Medicaid consumers should be able to choose among appropriate groups of services within cost and outcome boundaries that adequately and effectively meet their needs and preferences.</p>	<p>State/Federal Policy</p>	<p>State/Federal Policy</p>
<p>Strategies 1. A choice of services will be available to consumers. The choices available to consumers who are Medicaid clients are limited to the package of services that meet their needs in the most effective and cost-efficient manner.</p>	<p>S/F</p>	<p>S/F</p>
<p>Action 1. Convene a stakeholders' workgroup (advocates, consumers, providers, Department of Human Services staff and other interested parties) to report its recommendations about service packages and cost ranges to the Governor and the Legislative Assembly. The recommendation should address any differences between packages and ranges for seniors and people with disabilities.</p>	<p>S</p>	
<p>Action 2. Pursue changes in federal regulations and/or waivers to allow consumers to be offered services within boundaries.</p>	<p>S</p>	<p>S/F</p>

Finance

Goal Statement: Oregonians must be provided with incentives to make financially responsible decisions about their future long-term care needs.	State/Federal Policy	State/Federal Funding
Strategy 1. Promote the use of private alternatives to fund long-term care including long-term care insurance.	S	
Action 1. Evaluate effectiveness of state long-term care insurance tax credit; recommend appropriate changes.	S	
Action 2. Work with Congressional delegation for a Federal deduction for long-term care insurance.	S	F
Action 3. Pursue federal and state law changes to provide incentives for the use of reverse mortgages to defer Medicaid.	S/F	
Action 4. Pursue state tax penalty surcharge on most retirement account withdrawals before normal retirement age; dedicate surcharge to help fund Medicaid long-term care.	S	
Action 5. Encourage charitable contributions to long-term care.	S	
Action 6. Work with Congressional delegation to allow taxpayers who do not itemize their federal tax deductions to claim deductions for charitable giving and long-term care insurance.	S	F
Action 7. Create a tax refund check-off for long-term care funding for Oregon residents.	S	S
Action 8. Work with private and public employers and advocacy groups to help employees plan for retirement including offering long-term care insurance.	S	
Action 9. Create a tax incentive for employers to offer long-term care insurance to their employees.	S/F	S/F

Goal Statement: Stable funding sources adequate to meet documented needs and costs must be identified and developed.	State/Federal Policy	State/Federal Recommendation
Strategy 1. Encourage the Congressional delegation to support financing strategies to add prescription drugs and long-term care benefits to Medicare.	F	F
Strategy 2. Begin dialogue among state and local governments to consider various local funding alternatives.	S	
Action 1. Encourage the development of local taxes and/or levies as a method to increase funding for programs and services for seniors and people with disabilities.	S	
Action 2. Recommend continuation and expansion of federal dollars for Farmers' Market coupon program for seniors and to include people with disabilities.	F	F
Strategy 3. Provide cost containment to improve affordability and access.	S	
Action 1. Support the continued development of methods for combining evidenced-based medical recommendations with cost considerations.	S	
Action 2. Develop methods for providing affordable pharmaceuticals and strategies to promote equitable access to useful medications.	S/F	
Strategy 4. Develop mechanisms to provide health care coverage for all to diminish the incidence of chronic disease and long-term care costs.	S/F	S/F
Action 1. Support cost effective expansion of Medicaid medical coverage and other public medical programs to provide health insurance to Oregonians at lower income levels.	S/F	S/F
Action 2. Expand public medical assistance programs to provide health insurance to all where the insurance premium is excessive in proportion to after-tax household income.	S/F	S/F
Action 3. Change health insurance practices to provide multi-year policies that include incentives to invest in prevention and reduce administrative costs.	S	
Action 4. Develop reimbursement incentives to provide optimal care in all settings, including medical offices, homes, and long-term care facilities.	S/F	S/F

<p>Goal Statement: Stable funding sources adequate to meet documented needs and costs must be identified and developed.</p>	<p>State/Federal Policy</p>	<p>State/Federal Policy</p>
<p>Action 5. Develop incentives for comprehensive and complicated care of seniors and people with disabilities including appropriate reimbursement for:</p> <ul style="list-style-type: none"> a) Health assessment, consultation and counseling b) Delivery models that do not require in-person visits, and c) Working with families and caregivers. 	<p>S/F</p>	<p>S/F</p>

<p>Goal Statement: Medicare and Medicaid program rules, coverage and expenditures need to coordinate and jointly provide seniors and people with disabilities with required services. Required services include acute and long-term care, pharmaceuticals, mental health and chemical dependency services.</p>	<p>State/Federal Policy</p>	<p>State/Federal Budget</p>
<p>Strategy 1. Develop and implement various models of joint state and federal financing of all care services.</p>	<p>S/F</p>	<p>S/F</p>
<p>Action 1. Actively pursue Federal waivers to allow Oregon to integrate Medicare and Medicaid funding streams.</p>	<p>S/F</p>	<p>S/F</p>
<p>Action 2. Work with the Congressional delegation to promote regional parity of Medicare payments.</p>	<p>F</p>	<p>F</p>
<p>Action 3. Revise the federal and state rules concerning the use of Medicaid and Medicare funds making them more flexible so that the use of these funds is not site specific.</p>	<p>S/F</p>	<p>S/F</p>
<p>Action 4. Revise the Medicare definition of homebound to ensure that access to Medicare home services is more flexible.</p>	<p>F</p>	<p>F</p>
<p>Action 5. Expand Oregon’s current Program of All-Inclusive Care for the Elderly (PACE) demonstration to a non-urban provider and location to test its effectiveness in rural parts of the state.</p>	<p>S/F</p>	<p>S/F</p>
<p>Action 6. Actively pursue grant funding for demonstration projects that will allow Oregon to grow the infrastructure needed for acute and long-term care integration.</p>	<p>S</p>	<p>S</p>

Goal Statement: Medicaid reimbursement for long-term care needs to compensate providers based on both consumer needs and provider costs.	State/Federal Policy	State/Federal Budget
Strategy 1. Reimbursement across the long-term care continuum should reflect market-based costs that meet stipulated consumer need in various settings.	S	S/F
<p>Action 1. Appoint a workgroup of long-term care providers, advocates and public sector representatives and workforce representatives that:</p> <ul style="list-style-type: none"> a) explores issues around subsidization of the public sector by private sector b) explores levels of adequacy in contingency reserves, profits and planned giving; c) develops recommendations for criteria upon which to base rates; d) develops reimbursement strategies that reward empirically measured quality outcomes; and e) explores regulations that inadvertently increase provider costs. 	S	
<p>Action 2. Complete an analysis of:</p> <ul style="list-style-type: none"> 1. the different costs of doing business in different regions of the state; 2. cost differences in operation of facilities of different sizes; 3. costs that are driven by aging facility infrastructure; and 4. current wage and benefit levels for direct-care staff across long-term care settings. 	S	S
Action 3. Regularly collect, analyze and maintain the cost data of providing community-based care.	S	S
Action 4. Develop and implement a long-term care assessment tool as the basis of the rate setting process that recognizes consumer needs based on medical acuity, activities of daily living assistance and psychosocial conditions.	S	S
Action 5. Change regulatory structure to reflect that need for long-term care services is driven by consumer's medical and psychosocial conditions as well as their need for assistance with activities of daily living.	S/F	S/F
Action 6. Develop models that adjust rates in ways that recognize both different consumer needs and different cost structures, and that motivate quality outcomes.	S/F	S/F

Service Provision

Goal Statement: All Oregonians have access to health care.	State/Federal Policy	State/Federal Budget
<p>Strategy 1. Develop health systems that are a continuum supporting all people when they need care, where they need care, and how they need care. The continuum includes:</p> <ol style="list-style-type: none"> 1. Prevention/Health Promotion 2. Illness recovery 3. Chronic disease management 4. Rehabilitation and functional support and long term care support 5. End of life Care 6. Mental Health Services 7. Pharmacy Management 8. Substance abuse services 	S/F	S/F
<p>Action 1. Develop unified approach to the current fragmented system.</p>	S/F	S/F
<p>Action 2. Within the parameters of state and federal confidentiality laws, provide access to records and information sharing across agencies and providers with prior consumer consent.</p>	S	
<p>Strategy 2. Improve methods for screening, prevention and management of chronic conditions.</p>	S	S/F
<p>Action 1. Expand use of screening and assessment methodologies to identify modifiable or reversible conditions causing excessive disability.</p>	S	S/F
<p>Action 2. Identify, evaluate and replicate effective programs in the following areas: fall prevention, proper nutrition; physical activity; smoking cessation; screenings and immunizations; medication management; and chronic disease management.</p>	S	S
<p>Action 3. Identify and focus preventive activities with specific communities shown to have a higher prevalence for certain chronic diseases.</p>	S	S
<p>Action 4. Establish or expand programs to train volunteers to conduct evaluations of homes for hazards that lead to falls and injuries.</p>	S	S

Goal Statement: All Oregonians have access to health care.	State/Federal Policy	State/Federal Budget
Action 5. Increase the use of evidence-based management tools for health and chronic conditions.	S	S
Action 6. Encourage the incorporation and support of individual goal setting for chronic disease management by providers and health educators.	S	
Action 7. Establish, develop, and fund chronic disease self-management.	S	S/F
Strategy 3. Promote health care systems that encourage consumer-centered service coordination.	S/F	
Action 1. Provide professional liability and regulatory protection to care providers when a consumer makes a capable choice that involves risk.	S/F	S/F
Action 2. Assure individuals have complete access and ownership of the information in their medical/social records.	S/F	
Action 3. Provide access to communication devices for consumers with high need and who cannot afford them, to assist in communication with health care providers.	S/F	S/F

<p>Goal Statement: Identify, develop and support cost-effective services, programs and products that proactively promote the individual=s ability to successfully respond to life changes and care needs.</p>	<p>State/Federal Policy</p>	<p>State/Federal Funding</p>
<p>Strategy 1. Develop effective methods to identify and intervene early with those individuals who are at risk of needing long-term care.</p>	<p>S</p>	<p>S</p>
<p>Action 1: Expand the gatekeeper-type programs.</p>	<p>S</p>	<p>S</p>
<p>Strategy 2. Anticipating a significant growth of demand and need, ensure a stable supply of viable long-term care options that are desirable to the consumer.</p>	<p>S</p>	<p>S</p>
<p>Action 1: Develop projections of future needs and system capacity.</p>	<p>S</p>	
<p>Action 2: Assess various levels of services and utilization to help identify what it takes to stabilize availability of long-term care options and services.</p>	<p>S</p>	
<p>Action 3: For those areas that cannot provide or support viable/stable long term care options (rural areas, ethnic communities), the state should provide subsidies and flexibility regarding program models.</p>	<p>S</p>	<p>S</p>
<p>Strategy 3. Provide statewide services to promote independence and choice.</p>	<p>S</p>	
<p>Action 1: Expand access to consumer-directed care options.</p>	<p>S</p>	
<p>Strategy 4. Coordinate, wherever possible, planning for seniors and people with disabilities with planning for all children, families and communities. Work towards collaborative planning that encompasses the continuum of services and supports for family members of all ages.</p>	<p>S</p>	
<p>Action 1. Partner with state and local agencies/commissions, schools and private organizations to mutually promote intergenerational activities, public awareness campaigns and collaborative planning.</p>	<p>S</p>	
<p>Strategy 5. Foster the development of quality insurance products and rate them to facilitate consumer choice and comparability.</p>	<p>S</p>	
<p>Strategy 6. Explore strategies that address the issues of availability, access and affordability of liability insurance for nursing homes and community-based care facilities.</p>	<p>S</p>	
<p>Action 1. State of Oregon should create a self-funded liability insurance program available to facilities.</p>	<p>S</p>	<p>S</p>

<p>Goal Statement: Identify, develop and support cost-effective services, programs and products that proactively promote the individual=s ability to successfully respond to life changes and care needs.</p>	<p>State/Federal Policy</p>	<p>State/Federal Policy</p>

Goal Statement: To effectively assist at-risk Oregonians and establish consistent statewide solutions to issues related to diminished capacity and reducing the incidents of abuse.	State/Federal Policy	State/Federal
Strategy 1. Evaluate and revise the Adult Protective Service function of the State.	S	
Action 1: Clarify the definition of abuse across all care settings.	S	
Action 2: Develop uniform training curriculum for adult protective services investigators, law enforcement, legal professionals, medical and long term care providers.	S	S
Action 3: Standardize investigation procedures and timelines.	S	
Action 4: Increase staffing and allocate to local areas more realistically and equitably.	S	S
Action 5: Provide oversight to determine if interventions are timely and appropriate, and if local triage decisions are adequate.	S	
Strategy 2. Fund, develop, and implement a continuum of services to assist people with various degrees of capacity in decision making.	S	S
Action 1: Develop more guardianship diversion services, including bill-payer and representative payee programs.	S	S
Action 2: Increase the number of qualified guardians and conservators, especially for indigent persons.	S	S
Action 3: Evaluate the need to create a registration and certification system for guardians and conservators. Based on the result of the evaluation, develop such a system.	S	S
Action 4: Encourage the completion of advance directives for health care.	S	
Action 5. Develop tools for assessing decision-making capability, especially for people with multiple disabilities.	S	
Strategy 3. Develop model programs to improve fraud, abuse and exploitation prevention programs.	S	S
Action 1: Develop and distribute a user-friendly universal screening tool for abuse to be used by community gatekeepers.	S	S

<p>Goal Statement: Identify, support and develop cost effective services and products that effectively address special needs populations that require services related to aging, long-term care, or physical disability.</p>	<p>State/Federal Policy</p>	<p>State/Federal Funding</p>
<p>Strategy 1. Plan and implement a strategy to integrate services for individuals with mental health needs, substance abuse treatment needs, or persons with developmental disabilities who also need long-term care into the acute and long-term care systems.</p>	<p>S</p>	<p>S</p>
<p>Action 1: Convene planning processes involving consumers and representatives of the mental health, substance abuse treatment, developmental disabilities services, and representatives of long-term care and acute care systems to develop methods of serving these populations seamlessly.</p>	<p>S</p>	
<p>Action 2: Develop a process for identifying elders and people with disabilities who have clinical mental health needs, substance abuse treatment needs, and developmental disabilities.</p>	<p>S</p>	<p>S</p>
<p>Action 3. Work with providers of mental health, substance abuse prevention and treatment, and developmental disabilities services to identify individuals who are anticipated to be in need of services regarding aging or disability.</p>	<p>S</p>	<p>S</p>
<p>Action 4. Develop and provide integrated funding sources sufficient to meet identified needs.</p>	<p>S</p>	<p>S</p>
<p>Action 5: Implement, monitor and evaluate the results of the planning process.</p>	<p>S</p>	<p>S</p>

<p>Goal Statement: Identify, support and develop culturally competent services and products that proactively and effectively serve individuals and cultural and ethnic communities that require services related to aging, long-term care, or physical disability.</p>	<p>State/Federal Policy</p>	<p>State/Federal Budget</p>
<p>Strategy 1. Dialogue with representatives of cultural and ethnic communities to identify discrete needs and service strategies within those communities.</p>	<p>S</p>	
<p>Action 1: Take the result of the needs assessment and assist those communities to establish culturally competent programs and services.</p>	<p>S</p>	<p>S</p>
<p>Action 2: Take the results of the needs assessment and assist all providers in Oregon with providing culturally competent services.</p>	<p>S</p>	<p>S</p>
<p>Action.3: Develop and provide integrated funding sources sufficient to meet identified needs.</p>	<p>S/F</p>	<p>S/F</p>
<p>Action 4: Implement, monitor and evaluate the results of the planning process.</p>	<p>S</p>	<p>S</p>

Education

Goal Statement: Educate all health care providers about aging and disability.	State/Federal Policy	State/Federal Budget
Strategy 1. Increase training options where consumers and their representatives are viewed as capable and autonomous and managers of their care.	S	S
Action 1. Support educational institutions in developing curricula that trains the providers to facilitate consumer driven decisions.	S	S
Strategy 2. Increase educational capacity by increasing enrollment in health, long-term care and social services, availability of qualified instructors, clinical capacity, funding and awareness of health and long-term care careers.	S	S
Action 1. Offer community-based caregiver training opportunities from secondary schools and colleges.	S	S
Action 2. Establish a program of scholarship, tax credits and tax expenditures to promote and increase geriatric training in professional schools.	S/F	S/F
Action 3: Make training programs specific to geriatric, physical and mental disabilities and developmental disabilities a priority within the federal and state medical residency funding streams.	S/F	S/F
Strategy 3. Enhance health and long-term care students' educational experience by providing them with incentives, improving competencies, increasing flexibility, options and support systems and developing optimal mobility through career pathways.	S/F	S/F
Action 1: Develop statewide mandatory curriculum requirements in geriatrics, disability, and diversity-related issues for all levels of education.	S	S

Workforce Development

<p>Goal Statement: Develop and maintain a health and long-term care trained, responsible and appropriate workforce sufficient to meet statutory mandates and provide quality care to all Oregonians.</p>	<p>State/Federal Policy</p>	<p>State/Federal Budget</p>
<p>Strategy 1. Develop and provide incentives to attract and retain individuals to the health and long-term care workforce.</p>	<p>S</p>	<p>S</p>
<p>Action 1: Increase and expand enrollment capacity of licensed nurses at both the community college and university levels.</p>	<p>S</p>	<p>S</p>
<p>Action 2. Establish programs of scholarship, tax credits, tax expenditures and other financial incentives to promote nursing as a career and to increase the number of nurses.</p>	<p>S/F</p>	<p>S/F</p>
<p>Action 3: Assure that facility staffing standards are tied to realistic workload expectations (in order to provide necessary quality of care).</p>	<p>S</p>	
<p>Action 4: Explore the potential of utilizing the federal immigration policies to attract qualified health and long-term care workers.</p>	<p>F</p>	
<p>Action 5: Medicaid reimbursement rates should be adequate to provide competitive wages and benefits for long-term care, in-home and health workers.</p>	<p>S/F</p>	<p>S/F</p>
<p>Action 6: Provide ongoing training and opportunities for advancement, and increased competency and professionalization of providers.</p>	<p>S</p>	<p>S</p>
<p>Action 7: Develop and implement recruitment outreach programs to increase professionals trained in geriatrics, psychiatry and physiatry.</p>	<p>S/F</p>	<p>S/F</p>
<p>Action 8: Support an ongoing centralized effort that facilitates health and long-term care workforce development and serves as a clearinghouse for innovative activities and best practices throughout the state.</p>	<p>S</p>	<p>S</p>

<p>Goal Statement: Develop and maintain a health and long-term care trained, responsible and appropriate workforce sufficient to meet statutory mandates and provide quality care to all Oregonians.</p>	State/Federal Policy	State/Federal Budget
<p>Action 9: Explore options for providing access to health and dental insurance for licensed Adult Foster Home providers and their employees.</p>	S	S
<p>Strategy 2. Develop a workforce that is culturally sensitive and responsive to age, disability, race, gender and ethnicity.</p>	S	
<p>Action 1. Develop programs to encourage diversity in recruitment of care providers.</p>	S/F	S/F
<p>Action. 2. Include culturally competent materials and evaluation in training, professional development, quality assurance and licensing programs.</p>	S	S

Technology

<p>Goal Statement: Broad-based technology will be a tool to improve quality of life for aging Oregonians and people with disabilities. Systems should be affordable, user friendly, comply with universal design principles and respect the privacy rights of everyone.</p>	<p>State/Federal Policy</p>	<p>State/Federal Budget</p>
<p>Strategy 1. Technology will be used to improve medical and in-home care and will include the use of remote caregiving and telemedicine.</p>	<p>S/F</p>	<p>S/F</p>
<p>Action 1. Disseminate telemedicine and health safety monitoring systems in homes and facilities, especially in rural areas.</p>	<p>S/F</p>	<p>S/F</p>
<p>Action 2. Establish a payment schedule for tele-medicine and tele-care services.</p>	<p>S/F</p>	<p>S/F</p>
<p>Action 3. Evaluate the experiences of the 20 states that pay for telemedicine and remote caregiving and adopt their best practices.</p>	<p>S/F</p>	
<p>Action 4. Obtain waivers or modify the Oregon Health Plan to allow payment for medical, home care, and other Medicaid services delivered remotely.</p>	<p>S/F</p>	<p>S/F</p>
<p>Action 5. Create a workgroup to explore options, conditions and costs of remote delivery of selected provider and caseworker services.</p>	<p>S</p>	
<p>Action 6. Develop and distribute personal smart cards or computer cards for management of personal medical records and easy portability.</p>	<p>S/F</p>	<p>S/F</p>
<p>Action 7. Ensure utilization of computer programs to store medical and social records with privacy-protected Internet access.</p>	<p>S/F</p>	<p>S/F</p>

Housing, Families, and Communities

Public Policy

Goal Statement: State policy for long-term care will focus on the quality of different care settings to determine whether services achieve beneficial outcomes, promote quality of life and are cost-effective.	State/Federal Policy	State/Federal
Strategy 1. Develop systems to measure, evaluate and incorporate continuous quality improvement programs.	S	S
Action 1. Emphasize consumer-oriented satisfaction measures that include personal dignity, independence, autonomy, security and functional status.	S	
Action 2. Increase consumer involvement in development of programs & quality measurements.	S	
Action 3. Utilize outcome measures in the development of new programs and services.	S	
Action 4. Conduct a comprehensive, independent evaluation of the outcome and quality assurance measurements currently used to evaluate the long-term care system.	S	S
Action 5. Ensure that a system is developed and implemented to evaluate the effectiveness of programs and services to seniors and people with disabilities using empirical data and quality of review information. Make outcome data and evaluation results easily accessible in a usable format to consumers and legislators.	S	S
Action 6. Using empirical data, conduct ongoing evaluations of the long-term care system to identify and resolve problems and issues.	S	S
Action 7. Utilize empirical data to change regulatory requirements to focus on outcomes for consumers.	S/F	S/F

Goal Statement: All Oregonians shall have a variety of community housing options available ranging from remaining in their own homes to living in long-term care facilities.	State/Federal Policy	State/Federal
Strategy 1. Provide a supply of age and disability friendly housing at a reasonable cost.	S	S
Action 1. Create a task force to explore the development of appropriate criteria to ensure sufficient capacity of a variety of long-term care settings.	S	
Action 2. Create a certificate for “Age and Disability Friendly Homes” that can be used as part of the marketing of the housing stock.	S	
Action 3: Recognizing that nursing facilities currently provide short-term post-hospital care and safety net services, the State of Oregon and providers will work together to ensure an adequate supply of nursing facility beds, taking into account regional capacity issues.	S	S
Action 4: Develop and implement a methodology for reimbursement to long-term care facilities that factors in improvements and maintenance of physical plant and technology that relate to the integrity, accessibility and functioning of the basic structure.	S	S
Strategy 2. Make land use rules more age and disability friendly.	S	
Action 1. Charge Department of Land Conservation and Development to review zoning laws to identify barriers to creating disability and senior friendly housing.	S	
Strategy 3. Assure all elderly and disabled Oregonians have housing that meets their basic needs.	S	S/F
Action 1. Review existing programs to determine regional housing gaps and develop programs to meet identified needs.	S	S/F
Action 2. Work with Oregon Economic and Community Development on helping define community-based enterprise zones in communities where incentives can be offered to offset from current and future tax liabilities.	S	S
Strategy 3. Allow families to care for their aging and disabled relatives with as little disruption to family life as possible by developing strategies that allow them to live independently nearby.	S	
Action 1. Work with Oregon Economic and Community Development Department and Oregon		

<p>Goal Statement: All Oregonians shall have a variety of community housing options available ranging from remaining in their own homes to living in long-term care facilities.</p>	<p>State/Federal Policy</p>	<p>State/Federal</p>
<p>Housing and Community Services Department to explore opportunities to use more Community Development Block Grant dollars for renovations and space accommodation.</p>	<p>S/F</p>	<p>F</p>
<p>Action 2. Develop statewide criteria for special use permits for accessory housing in single family residential zones for a limited time period in which a medical need exists as certified by a licensed medical provider.</p>	<p>S</p>	
<p>Strategy 4. Waive cumbersome and unnecessary requirements for specific pilot projects that employ new and creative building practices and promote a variety of models in housing development and customize them to meet local and individual needs.</p>	<p>S/F</p>	
<p>Action 1. Encourage the Oregon Department of Housing and Community Services, municipal housing authorities and the private sector to work together to develop accessible, affordable housing.</p>	<p>S</p>	
<p>Action 2. Create “Reinvention Labs” that allow public organizations to waive rules and procedures temporarily to experiment with new ways of meeting housing needs. (E.g. Oatfield Estates as a sample "hybrid care facility.")</p>	<p>S</p>	
<p>Action 3. Promote and support building code changes that favor “Smart Home” Technology and accessible construction.</p>	<p>S</p>	
<p>Strategy 5. Assure that publicly supported housing meets the needs of seniors and people with disabilities.</p>	<p>S</p>	
<p>Action 1. Increase the number of "set aside” units for special needs and persons with disabilities in new public housing developments.</p>	<p>S/F</p>	
<p>Action 2. Broaden Public Housing’s definition of disability to include the needs of people with Alzheimer’s, autism, dementia, sensory impairment, mental illness, head injury and age related disabilities to assure that public housing meets the needs of people with these conditions.</p>	<p>S/F</p>	<p>F</p>
<p>Action 3. Create and maintain an inventory of special housing for Oregon by combining data on the current status and conditions of publicly supported housing (Oregon Housing and Community Services Department, Department of Human Services and Housing Authorities). Use this data to determine Oregon’s ability to meet aging, disability and special needs.</p>	<p>S</p>	<p>S</p>
<p>Action 4. Review alternatives for utilizing existing Housing Authorities’ stock to convert to assisted living facilities.</p>	<p>S</p>	
<p>Action 5. Allow Housing Authorities to provide mixed housing (both affordable and market-based).</p>	<p>S/F</p>	

<p>Goal Statement: All Oregonians shall have a variety of community housing options available ranging from remaining in their own homes to living in long-term care facilities.</p>	<p>State/Federal Policy</p>	<p>State/Federal</p>
<p>Action 6. Pass legislation that allows Housing Authorities the same option that Oregon Housing and Community Services Department has to finance mixed housing.</p>	<p>S/F</p>	

<p>Goal Statement: Housing options will support personal dignity, promote privacy, autonomy, comfort and security and ensure optimal health and function.</p>	<p>State/Federal Policy</p>	<p>State/Federal Budget</p>
<p>Strategy 1. Implement Universal Design Principles that create an "enabled" environment to meet the challenges of those who have age and non-age related disabilities.</p>	<p>S</p>	
<p>Action 1. Research, organize and distribute information about best practices for housing design and modifications that are age and disability friendly and easily adapted to changing needs.</p>	<p>S</p>	<p>S</p>
<p>Action 2. Create a certification program for builders and architects that they can use to advertise their age and disability friendly qualifications.</p>	<p>S</p>	<p>S</p>
<p>Action 3. Work with Building Codes Division, Oregon Building Industry and Oregon Remodel Association to develop proper tools to teach "Smart Home" Technology.</p>	<p>S</p>	
<p>Strategy 2. Provide a choice of housing environments with diverse communal structures and cultural environments.</p>	<p>S</p>	<p>S</p>
<p>Action 1. Develop innovative approaches to long-term care, encouraging care through family and other informal supports as well as intergenerational residential care settings.</p>	<p>S</p>	
<p>Action 2. Provide opportunities for cultural enrichment.</p>	<p>S</p>	
<p>Action 3. Recognize the diversity of ethnic background and cultures in designing housing.</p>	<p>S</p>	
<p>Goal Statement: Oregonians live in communities that promote healthy aging.</p>	<p>State/Federal Policy</p>	<p>State/Federal Budget</p>
<p>Strategy 1. Public policies are implemented that support people being as physically active as possible including:</p>	<p>S/F</p>	<p>S/F</p>

<p>Goal Statement: Oregonians live in communities that promote healthy aging.</p>	<p>State/Federal Policy</p>	<p>State/Federal Budget</p>
<ul style="list-style-type: none"> • Clean air • Safe and accessible sidewalks and street crossings • Open space/parks/trails with benches • Bike paths and bike racks • Accessible, reliable public transportation (special attention to needs of rural citizens) • Accessible community based opportunities for recreational activities for seniors and people with disabilities. 		
<p>Action 1. Promote community and transportation designs that make Sidewalks, street crossings, bike paths and trails, and parks in communities safe and accessible for seniors and people with disabilities to encourage physical activity.</p>	<p>S/F</p>	
<p>Action 2. Subsidize individual and group memberships/partnerships for seniors and people with disabilities in fitness programs.</p>	<p>S</p>	<p>S</p>
<p>Action 3. Promote extra-curricular, extra-mural daily physical activity at K-12 levels of education for all students to promote positive life-long healthy habits.</p>	<p>S</p>	
<p>Action 4. Create a report card for evaluating elder- and disability-ready communities.</p>	<p>S</p>	<p>S</p>
<p>Strategy 2. Public policies are implemented that support access to healthy foods including:</p> <ul style="list-style-type: none"> • Easily accessible neighborhood groceries with healthy foods, especially vegetables and fruits, and • Easily accessible Farmer’s Markets with vegetable and fruit coupon programs for low income seniors and people with disabilities. 	<p>S</p>	
<p>Action 1. Promote local policies that support Farmer’s Markets being in areas accessible to seniors and people with disabilities.</p>	<p>S</p>	

<p>Goal Statement: Oregonians live in communities that promote healthy aging.</p>	<p>State/Federal Policy</p>	<p>State/Federal Budget</p>
<p>Strategy 3. Promote worksite environments that support daily physical activity and healthy food choices including:</p> <ul style="list-style-type: none"> • Bike racks, exercise rooms, showers, health promotion information and classes in chronic disease self management at the worksite and/or in partnership with fitness/health centers and with flexible work arrangements • Participation in programs promoting use of mass transit (e.g. free or low cost passes) • Access to healthy food in cafeterias and vending machines. 	<p>S</p>	
<p>Action 1. Provide worksites with model policies for promoting physical activity, healthy eating, and chronic disease self-management.</p>	<p>S</p>	<p>S</p>
<p>Action 2. Develop state recognition and award programs for worksites that promote “Healthy Policies.”</p>	<p>S</p>	<p>S</p>
<p>Action 3. Provide tax incentives for worksites that meet “Healthy Policies” criteria.</p>	<p>S/F</p>	<p>S/F</p>
<p>Strategy 4. Public policies will support neighborhood and housing designed or retrofitted to support elders and people with disabilities including housing, worksites, schools and retail/business centers within walking, biking and easy mass transit distance. Building and recreational facilities will be built or renovated with accessible construction (visitability), such as smart home construction communities.</p>	<p>S</p>	
<p>Action 1. Promote state and local policies that support community and neighborhood designs that accommodate the needs of individuals with disabilities and the aging population.</p>	<p>S</p>	

<p>Goal Statement: All seniors and people with disabilities will be able to move freely and safely throughout their communities and access affordable, life-long transportation to assure independent living and allow people to remain connected to one another, to stores, to services, to healthcare, to employment and to the multitude of activities that make up life.</p>	<p>State/Federal Policy</p>	<p>State/Federal Budget</p>
<p>Strategy 1. Provide alternative transportation for elders, people with disabilities and those who cannot use existing public transportation that is economical and convenient and also assure that elders will not be car dependent beyond the years that they can drive safely.</p>	<p>S/F</p>	<p>S/F</p>
<p>Action 1. Explore Massachusetts model of testing and limiting or restricting time and venue of driving for those who are impaired.</p>	<p>S</p>	
<p>Action 2. Develop and implement a system for diagnosis-driven mandatory driving assessments.</p>	<p>S</p>	<p>S</p>
<p>Action 3. Expand the 55 Alive Program (American Association of Retired Persons) to assure it is available to all drivers.</p>	<p>S</p>	<p>S</p>
<p>Action 4. Expand the Department of Human Services transportation programs for those with special needs.</p>	<p>S</p>	<p>S</p>
<p>Action 5. Pool resources across jurisdictional lines, e.g. use school buses to transport elders and people with disabilities during school hours.</p>	<p>S</p>	
<p>Action 6. Provide a full range of convenient and affordable mobility alternatives for those who rely on public transportation.</p>	<p>S/F</p>	<p>S/F</p>
<p>Strategy 2. Locate more housing for seniors and people with disabilities in public transit corridors to capture the benefit of the Americans with Disabilities Act required "curb to curb" transportation at reasonable cost.</p>	<p>S</p>	
<p>Action 1. Create cross agency teams to explore and implement plans that locate housing near fixed transportation lines and take advantage of Americans with Disabilities Act required transportation.</p>	<p>S</p>	

<p>Goal Statement: All seniors and people with disabilities will be able to move freely and safely throughout their communities and access affordable, life-long transportation to assure independent living and allow people to remain connected to one another, to stores, to services, to healthcare, to employment and to the multitude of activities that make up life.</p>	State/ Federal Policy	State/ Federal Budget
<p>Action 2. Encourage local government planning commissions to develop incentives for locating housing within transit overlay districts.</p>	S	
<p>Action 3. Offer incentives to builders to construct and remodel special needs and age friendly housing near fixed transportation lines.</p>	S	S

Finance

Goal Statement: Identify and develop funding sources and incentives to meet the needs of seniors and people with disabilities.	State/Federal Policy	State/Federal Budget
Strategy 1. Avoid costly displacement of elders and persons with disabilities.	S	
Action 1. Require Oregon Housing and Community Services Department and Department of Human Services to collaborate on the best way to create Oregon Housing Trusts that allow parents to place housing assets in trust for their children with disabilities.	S	S
Action 2. Fund Oregon Housing and Community Services Department to hire architects trained in special needs, disability and senior housing issues to act as resources to builders and architects.	S	S
Action 3. Expand funding for the Oregon Housing and Community Services Department to establish housing centers in every region of Oregon to provide information and advice to home owners about building techniques, financing options, approved contractors, sub-contractors, maintenance and job tradesmen. Maintain a list of “approved” builders and tradesmen and tradeswomen.	S	S
Action 4. Create demonstration programs with state funds dedicated to increase number of low-income elderly units that have programs to allow residents to remain independent in their communities.	S	S
Action 5. Support an increase in Oregon Lender Tax Credits that are used directly to reduce the cost of rents in low-income elderly units and for people with disabilities.	S	S
Action 6. Establish a program of low interest loans and other subsidies that can be used for housing repairs, maintenance and adaptations to avoid costly displacement.	S	S
Action 7. Allocate federal Community Development Block Grant dollars for renovations and accommodations for existing homes owned and occupied by people with disabilities and seniors.	S	
Action 8. Track and support having a federal law change that would create a low income tax credit program for low-income homebuyers for the purchasing and/or retrofitting of homes to adapt to age and disability related needs.		F
Action 9. Provide tax incentives to promote the development of active community environments, home technology and accessible construction and increase funding for grants and low interest loans to finance conversions and new public units.	S/F	S/F
Action 10. Establish public housing tax exemptions for organizations that provide housing to		

Goal Statement: Identify and develop funding sources and incentives to meet the needs of seniors and people with disabilities.	State/Federal Policy	State/Federal Budget
low-income seniors and special needs population.	S/F	S/F
Action 11. Establish Special Needs Housing Trusts to assure a financial resource and appropriate housing and services for adult dependent children.	S/F	S/F
Action 12. Maintain and expand low income tax credits and other financial supports to provide equity in new and existing developments.	S	S
Action 13: Support programs like “Home of Your Own” that facilitate home ownership by people with disabilities.	S	S

Education

Goal Statement: Oregonians must be provided with information necessary to empower them to make knowledgeable decisions about planning for potential long-term care needs either in old age or with disabilities.	State/Federal Policy	State/Federal Budget
Strategy 1. Identify and provide increased training to Oregonians in order to maximize their independence and opportunities within the community.	S	S
Action 1 Educate policy makers about the demographic trends and expectations that government will deliver programs when and how the public wants them, and the difference between the costs and revenues.	S	
Action 2. Train the public to be able to critically evaluate information available through the Web and other sources.	S	S
Action 3. Expand education of consumers and family members regarding their rights to make decisions about health care and housing options through the development and dissemination of	S	S

<p>Goal Statement: Oregonians must be provided with information necessary to empower them to make knowledgeable decisions about planning for potential long-term care needs either in old age or with disabilities.</p>	<p>State/Federal Policy</p>	<p>State/Federal Budget</p>
<p>materials in various formats.</p>		
<p>Action 4. Develop and disseminate information regarding health and wellness via state and local public health agencies. Use widespread public education techniques to promote health such as television ads, billboards, radio, signs on public vehicles, etc.</p>	<p>S</p>	<p>S/F</p>
<p>Action 5: Develop and disseminate information on the types and indicators of abuse and resources and services available.</p>	<p>S</p>	<p>S</p>
<p>Action 6. Create a public awareness campaign to inform the public about the threat to public safety posed by persons driving beyond the age that they are capable.</p>	<p>S</p>	<p>S</p>
<p>Action 7. Develop user-friendly information for consumers to understand and navigate long-term care services facilitating evaluation, comparability and informed decision-making.</p>	<p>S</p>	<p>S</p>
<p>Action 8. Create an interactive educational website, housed at Oregon Housing and Community Services Division, to provide photos, drawings and specifications describing solutions to housing problems faced by people of all ages with disabilities.</p>	<p>S</p>	<p>S</p>
<p>Action 9. Fund a "Day in the Life" newspaper insert campaign to create an understanding of what it might be like as an elder, in order to broaden public awareness and encourage individual planning for future needs.</p>	<p>S</p>	<p>S</p>
<p>Action 10: Develop training and user friendly information for families and individuals with disabilities to help them understand how to design, direct and evaluate the supports and services they use.</p>	<p>S</p>	<p>S</p>
<p>Strategy 2. Educate Oregonians around financial issues related to elder years, aging process and chronic disabilities.</p>	<p>S</p>	<p>S</p>
<p>Action 1: Educate individuals about long-term care and the likely need for insurance. Develop and distribute materials explaining the advantages and disadvantages of long-term care insurance purchase.</p>	<p>S</p>	<p>S</p>

<p>Goal Statement: Oregonians must be provided with information necessary to empower them to make knowledgeable decisions about planning for potential long-term care needs either in old age or with disabilities.</p>	<p>State/Federal Policy</p>	<p>State/Federal Priority</p>
<p>Action 2. Create and implement a professional certification for agents who sell long-term care insurance. Require that agents complete continuing professional education work related to aging issues to retain certification.</p>	<p>S</p>	<p>S</p>
<p>Action 3. Develop and distribute information explaining the pros and cons of using a reverse mortgage to help finance elder years and/or long-term care.</p>	<p>S</p>	<p>S</p>
<p>Action 4: Provide consumer education, counseling, and state oversight to prevent predatory lending practices.</p>	<p>S</p>	<p>S</p>
<p>Action 5. Create and implement a professional certification for brokers and others who market reverse mortgages. Require that sellers complete continuing professional education work related to aging issues to retain certification.</p>	<p>S</p>	<p>S</p>
<p>Action 6. Increase availability and access to people who are competent and skilled in benefits planning.</p>	<p>S</p>	
<p>Strategy 3. Promote health education in a culturally appropriate manner throughout schools, worksites, communities, and health systems to provide information needed to make lifestyle changes and choices related to:</p> <ol style="list-style-type: none"> 1. Health promotion and disease prevention 2. Disease recognition and management (early education) 3. Chronic disease management 4. Medication management, and 5. Myths and facts about aging and disability. 	<p>S</p>	<p>S</p>
<p>Action 1. Mandate and fund school health, nutrition , and physical education at all levels.</p>	<p>S</p>	<p>S</p>
<p>Action 2. Expand funding for public awareness campaigns about the health benefits of good nutrition and physical activity.</p>	<p>S</p>	<p>S</p>

<p>Goal Statement: Oregonians must be provided with information necessary to empower them to make knowledgeable decisions about planning for potential long-term care needs either in old age or with disabilities.</p>	<p>State/Federal Policy</p>	<p>State/Federal Priority</p>
<p>Strategy 4. Educate Oregonians to value, support, and respect elders and people with disabilities.</p>	<p>S</p>	<p>S</p>
<p>Action 1 Promulgate a strategic initiative for families highlighting the social value of extended families.</p>	<p>S</p>	<p>S</p>
<p>Action 2. Promote intergenerational training, experiences and mentoring through educational, work, and recreational organizations.</p>	<p>S</p>	<p>S</p>
<p>Action 3. Document and publicize the benefits to all citizens from living in mixed neighborhoods - age, income, ethnicity and ability.</p>	<p>S</p>	<p>S</p>
<p>Strategy 5. Promote a public action campaign regarding abuse of seniors and people with disabilities.</p>	<p>S</p>	<p>S</p>
<p>Action 1. Promote public education and information about the risks of abuse and its consequences to the elderly and people with disabilities.</p>	<p>S</p>	<p>S</p>
<p>Action 2. Increase education of district attorneys and judges regarding abuse of the elderly and people with disabilities.</p>	<p>S</p>	<p>S</p>

Goal Statement: Educate older Oregonians, people with disabilities and their families about issues affecting them.	State/Federal Policy	State/Federal Policy
Strategy 1. Educate Seniors and People with Disabilities about the availability of health, legal, social and long-term care services.	S	S
Action 1. Develop programs on health maintenance for seniors and people with disabilities by working with advocacy networks, health care providers and state agencies.	S	S
Action 2. Conduct a public action campaign to inform the public about the serious consequences of falls, fall prevention and safety hazards in the home.	S	S
Action 3. Expand education of consumers and families on the benefits and risks associated with various long-term care options.	S	S
Action 4. Refine information currently given to Medicaid consumers to better explain the Medicaid estate recovery process.	S	
Action 5. Provide education to widowers and widows on living independently.	S	S
Action 6. Work with education system to graduate youth with disabilities with skills to be employable.	S	S
Strategy 2. Educate people about technologies such as remote wireless (X-10) and other “smart home” technology related to health and prevention (fall prevention aids, fall detectors, home warning systems, home physiology monitoring, pill reminders, etc) to extend the time people can live safely in their own homes.	S	S
Strategy 3. Educate seniors and people with disabilities on strategies for staying or becoming productive and employable, if desired.	S	S
Action 1. Develop a program that teaches seniors and people with disabilities to evaluate their skills.	S	S
Action 2. Expand information to seniors and people with disabilities on employment opportunities and other activities such as volunteerism.	S	S
Action 3: Support policies that eliminate the barriers to employment for people with disabilities and seniors.	S	

Family and Community Caregiver Support and Development

Goal Statement: Support and strengthen the role of family and informal caregivers for seniors and people with disabilities.	State/Federal Policy	State/Federal Budget
Strategy 1. Build on national research that identifies the circumstances and triggers for caregiver burnout.	S/F	S/F
Action 1: Provide extensive outreach to identify and assist caregivers in accessing services prior to burnout.	S/F	S/F
Action 2: Assure that caregiver services such as respite, adult day care, and support groups are available and affordable and in all parts of the state.	S	S
Action 3. Encourage the development of adult day care and respite services provided within long-term care settings.	S	
Action 4: Continue to develop and expand Older Americans Act Family Caregiver Programs.	S	S
Action 5: Expand state and federal family medical leave acts to cover more workers for longer periods.	S/F	
Strategy 2. Make training, information, emotional support and back-up assistance available to all family and informal caregivers.	S/F	S/F
Action 1: Expand the Oregon Cares caregiver web page.	S	
Action 2: Expand respite and other services to support family caregivers.	S	S
Strategy 3. Expand and promote options (tax incentives, caregiver support) to spouses, partners, and families that encourage them to provide care.	S/F	S/F
Action 1. Encourage and provide incentives to businesses to establish flexible schedules, programs and benefits to support family care giving.	S/F	S/F
Strategy 4. Develop and maintain caregiver registries that are easily accessed by those seeking care.	S	

Technology

<p>Goal Statement: Develop and promote broad-based technology to improve quality of life for seniors and people with disabilities. The technology should be affordable, user-friendly comply with universal design principles and respect the privacy rights of everyone.</p>	<p>State/Federal Policy</p>	<p>State/Federal Budget</p>
<p>Strategy 1. Utilize technology to support efficient, effective and safe transportation.</p>	<p>S/F</p>	<p>S/F</p>
<p>Action 1. Explore and support the use of technology to make cars safer, streets safer for pedestrians and promote the use of home delivery businesses to minimize risk and travel time.</p>	<p>S/F</p>	<p>S/F</p>
<p>Action 2. Support the use of technology for scheduling, routing, and web based transportation planning.</p>	<p>S</p>	<p>S</p>
<p>Strategy 2. Provide high level of assistive and communication technologies in homes and long-term care settings.</p>	<p>S/F</p>	<p>S/F</p>
<p>Action 1. Develop and test a menu of best practices that increase the utilization of technology for successful aging and for living well with a disability.</p>	<p>S</p>	<p>S</p>
<p>Action 2. Require homes and long-term care facilities to be “wired” to allow access to medical, telecommunications and “Smart Home” Technology at the time they are built or reconstructed to avoid costly retrofitting and to allow individuals to remain in their homes or long-term care facility of choice as long as possible.</p>	<p>S</p>	
<p>Action 3. Provide funding to agencies for information and technology specialists to administer and provide technical support to maintain the “Smart Home” Technology systems and train staff in their usage.</p>	<p>S</p>	<p>S</p>
<p>Action 4. Develop strategies to utilize technology as task supports so that caregivers are best utilized to promote optimal social interaction.</p>	<p>S</p>	
<p>Action 5. Establish a research institute and testing laboratory (Oregon Institute for Successful Aging and Technology) to invent, and market products and services that make computing ubiquitous and useable by frail elderly and others with disabilities.</p>	<p>S</p>	<p>S</p>

<p>Goal Statement: Develop and promote broad-based technology to improve quality of life for seniors and people with disabilities. The technology should be affordable, user-friendly comply with universal design principles and respect the privacy rights of everyone.</p>	<p>State/Federal Policy</p>	<p>State/Federal Budget</p>
<p>Action 6. Strategies should only be implemented with full knowledge and consent of care receivers (where capacity permits), guardians, and all parties involved in the process of care giving.</p>	<p>S</p>	
<p>Action 7. Investigate with Department of Human Services and Oregon Housing and Community Services Department how to add telecommunication requirements into state and federal funded housing activity.</p>	<p>S</p>	