

# Scripps Gerontology Center

## AGE AND AGENCY

Miami University  
Oxford, Ohio  
Winter 2008

[www.scrippsgaging.org](http://www.scrippsgaging.org)

*"Youth is a gift of nature; age is a work of art." Anonymous*

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We are all aging. **Age and Agency**, an original publication of the Scripps Gerontology Center, serves to examine the dynamics of aging, while providing information on the contributions we make to improving the lives of aging people. Through this newsletter, we intend to update friends, colleagues, and students about our activities in research and scholarship, education and training, and professional service.

## Scripps Hosts National Long-Term Care Business Institute



Frank Burns of the U.S. Administration on Aging (AoA) kicked off the first of a series of National Center for Long-Term Care Business and Strategy Workshops at Miami University's Marcum Center Nov. 8, emphasizing the need for the U.S. aging network to identify and coordinate resources to better serve older Americans through AoA's *Choices for Independence* initiative.

Hosted by the Scripps Gerontology Center - in partnership with the National Association of Area Agencies on Aging (n4a) - the workshops were attended and led by officials from AoA, n4a, and Scripps, as well as by 30 representatives from area agencies on aging (AAAs) and Native American Tribal Organizations (Title VI programs) across the country.

"The purpose of this event is to identify the needs of AAAs (and Tribal organizations) across the United States and to develop the capacity to implement the strategies

(for agencies) to qualify for competitive *Choices* grants," Burns, Deputy Assistant Secretary of AoA, stressed. Lead speakers, seminars and workshops focused on how the 655 area agencies on aging (AAAs) and 243 Native American Tribal Organizations in the United States can best design and implement aging services in line with the federal *Choices for Independence* program.

*Choices* is a multi-million dollar AoA initiative emphasizing local flexibility in promoting positive, preventive health measures and increased choices in long-term care services. A vital component of the Older Americans Act reauthorization in 2006, the *Choices* initiative, Burns emphasized, is a three-pronged strategic approach aimed at preventing older Americans from entering nursing homes through the nationwide promotion of:

- Consumer empowerment (Specifically through the development of Aging and Disability Resource Centers).

*Continued pg.7*

# Preliminary Choices Data Encouraging 80 Percent of AAA Surveys Returned Already

The Scripps Gerontology Center has compiled encouraging preliminary survey data on the ability of area agencies on aging (AAAs) to provide services under the national *Choices for Independence* initiative. Findings indicate that most AAAs are aware of *Choices* and “are eager to learn more,” and that technical assistance requests related to *Choices* have been second only to those associated with fundraising and resource development.

The survey is one of the first comprehensive assessments of all of the country’s 655 AAAs and 243 Native American Tribal (Title VI) organizations,\* examining basics such as funding sources, services provided and clients served, as well as readiness to promote healthy aging while streamlining and expanding access to home- and community-based services.

Scripps sent out the AAA survey June 25 and as of December had 80 percent at least partially completed and returned. Preliminary survey data also show that key components of the *Choices* initiative are already in practice by an encouraging proportion of AAAs nationwide:

- 68 percent of AAAs facilitate the transition of consumers from institutional placements to the community.
- 55 percent of AAAs target services to their most impaired clients.
- 37 percent of AAAs have been or are

now involved in an “evidence-based” disease –prevention grant program.

- 30 percent of AAAs have a designated Aging and Disability Resource Center.

Preliminary data also reveal that the most common services offered by AAAs nationwide are:

- Family Caregiver Support Program
- Home-delivered Meals
- Respite Care
- Transportation
- Congregate Meals
- Information and Referral/Assistance
- Legal Assistance

The least common services offered (provided by less than 50 percent of area agencies across the country) are:

- Home Health
- Adult Protective Services
- Eligibility Determinations for Public Programs
- Food Pantry
- Paperwork and Money Management Assistance
- Translator/Interpretive Assistance

Additionally, preliminary survey data show:

- The average AAA budget is \$8.7 million (median budget = \$3.8 million).
- The average AAA serves 8,683 clients (median clients served = 3,039).
- The average AAA employs 39 full-time and 20 part-time staff.
- Half of AAA’s identify the areas they

serve as “rural.”

- 38 percent of AAAs are independent agencies; 27 percent are part of a county government system; 2 percent are part of a city government system.
- 70 percent of AAAs receive funds from state general revenue funds; 60 percent receive funds from Medicaid waiver programs; 33 percent receive funds from private-pay clients.
- 48 percent of AAAs provide consumer-directed services.
- The most commonly provided of consumer-directed services are personal care; respite care; homemaker; home health and assistive devices.

\* Scripps has conducted five focus groups with Title VI directors and sent out surveys to the 241 Title VI aging organizations Aug. 31, 2007. Thirty percent have been returned as of December, but no reliable preliminary data has yet been compiled. Scripps has appointed Kathryn McGrew as its coordinator of the Title VI survey and has contracted with Cynthia LaCounte, Training and Technical Assistance Manager of Title VI programs and a member of Turtle Mountain Chippewa Tribe of North Dakota, as an independent consultant to assist with the survey.

For more information on the survey, please contact Survey Project Manager Abbe Linscott: (513)529-1911; [linscoae@muohio.edu](mailto:linscoae@muohio.edu).

## Updates from Upham Director's Notes



Suzanne Kunkel

***"It is not enough for a great nation merely to have added new years to life, our objective must be to add new life to those years."***

***- John F. Kennedy***

*The above sentiment, expressed by one of our more socially progressive presidents over 40 years ago, rings truer today than ever before. We have, indeed, added new*

*years to life in the United States in the past half century, increasing the average American's life expectancy from approximately 68 years in 1958 to 78 years in 2008. How much life we add to those years, as the baby-boom generation continues to reach age 65 in droves, remains - as one of our larger, more pressing social challenges - to be seen.*

*That is why we at Scripps are so pleased to be an integral part of the U.S. Administration on Aging's "Choices for Independence" initiative. Other articles in this newsletter will elaborate on our broader role with Choices, but Scripps was particularly honored to host the First National Long-Term-Care Business Institute, Nov. 8-10, at Miami University's Marcum Conference Center. We will host the second such national conference at the same venue in May of this year.*

*Choices represents a concerted and comprehensive effort by national aging-service leaders to do what former President Kennedy encouraged after the first White House Conference on Aging more than a generation ago: add life to the later years of older*

*Americans by giving them alternatives to traditional institutional care; add life to the later years of older Americans by helping them live as healthfully and independently as possible in the domain of overwhelming choice - their own homes and communities.*

*What is now the Scripps Gerontology Center was launched at Miami in 1922 as the Scripps Foundation for Research in Population Problems. Up until the 1960s, we served mainly as researchers in the realm of demographic predictions. Since that time, our mission has grown to include not only population projections, but, increasingly, to assess wants, needs, and preferences to better serve a specific population, older Americans - and to add life to their later years.*

*I'm sure our founder, the renowned humanist and self-described "sociologist" E.W. Scripps, would be more than proud to have his name attached so prominently to such a worthy endeavor. We who continue his legacy most certainly are.*

*Suzanne Kunkel*

*Director, Scripps Gerontology Center*

## Aging Services Board and Council Orientation Manual Available On-line in User-Friendly Form

A user-friendly, on-line orientation manual ("*Whys & Wherefores*") for board of trustees and advisory council members of area agencies on aging and tribal organizations is now accessible to all interested parties through the Web site: <http://www.cas.muohio.edu/n4a/manual%20home.htm>.

The manual, produced by Scripps on contract and with assistance from the National Association of Area Agencies

on Aging, addresses the mandates, duties and responsibilities of board and council members overseeing and assisting the country's 655 area agencies on aging and 243 tribal organizations. The 67-page document, which also includes a brief history of aging services in this country (find out about Thomas Paine's 1795 Social Security/old-age pension proposal; the original \$7.5 million allocated for Older Americans

Act programs in 1965; and the initial age-65 eligibility for OAA services), as well as an overview of the current Older Americans Act and U.S. Administration on Aging budget charts, is broken down into a directory of 42 separate headings serving as convenient links to specific sections of the manual, such as "Advocacy Tools," "Lobbying and Political Activities," "Older Americans Act," and "Common Acronyms."

## Meet Haesang Jeon

### Ph.D. Candidate Hopes to Make a Difference in the Lives of Older Persons

**H**aesang Jeon, a first-year Ph.D. student in gerontology, came to Miami University's Scripps Gerontology Center and Department of Sociology and Gerontology from the Republic of Korea (South Korea) with a few head starts on understanding English and cultures different from her own:

1. Her family moved from Seoul to Eugene, Oregon, from 1986 to 1988, when she was four years old so her father could pursue an advanced education in economics at the University of Oregon.
2. Her family moved to Ottawa, Canada (after returning to Seoul), where her father worked as a government official and Haesang attended Brookfield High School in Ottawa between 1996 and 1998.
3. Her undergraduate degree in International Relations from Seoul National University in the Republic of Korea (South Korea).

"Since I came to this country when I was just five, I can't remember not speaking English," Haesang says. "Language comes a little easier when you're young." Her English improved in Ottawa and served her well in earning her Master of Gerontological Studies degree from Miami's Department of Sociology and Gerontology last year. Haesang compared aging services among Korea, the United States, Japan and Germany for her master's critical inquiry requirement, noting that the tradition of families caring for their elderly members was declining in all of the countries she studied. "The idea of the government caring for older people is a relatively new concept everywhere," she noted,

"even in socialist countries."

While earning her master's degree in gerontology, Haesang lived with - and watched over - her younger brother, Kelly, who came to the United States with her to broaden his horizons and sample the American secondary education system at Talawanda High School. The biggest difference between education in the United States and Korea is found in the high school years, Haesang observes, during which Koreans feel a great deal of pressure to do well in order to qualify for a relatively small number of university openings. She also shares that education in the United States, particularly at the college level, is much more informal than in Korea. "We would never dream of calling our teachers by their first names, like we do here sometimes; it's always 'professor' or 'sir,' or 'Miss,'" she says. "Here, everybody is so friendly, open and accessible. I love the faculty; they're always there to help. The door is wide open, and that atmosphere makes learning easier and a lot less stressful. Also, we do not have a gerontology major yet in Korea, the subject matter falls under sociology."

The most difficult adjustment for Haesang at Oxford was its size, having come from Seoul and its 10 million people to less than 10,000 (not counting students) here. It took some getting used to, she confides, not having the hustle and bustle and all the shops and restaurants of a big city. "But the calm and quiet and prettiness of Oxford, all the tall trees and fresh air, are a good trade for the busyness of big-city living," she states. "It's beautiful here; it'll be hard to leave. And, when I go back to Korea, I'll miss pumpkin pie. We don't have it



Haesang Jeon

there."

After finishing her Ph.D. work (focusing on consumer choice/direction within the long-term-care system) at Miami, Haesang hopes to teach at a U.S. college or university for a few years before heading back to Korea and sharing what she has learned about older persons and the services society can provide to best help them maintain independent and meaningful lives.

Haesang's interest in aging stems from her close bonds with - and admiration for - her grandparents as well as a special relationship with an older tutor and mentor she had while studying in Japan for a year in pursuit of her International Relations degree. "I have benefited so much in so many ways from the older people in my life," she says. "It would be an honor for me to some day make a positive difference in their lives in return - to give back a part of what I've received."

## Former Scripps Director Publishing Book on Spirituality and Aging

**B**ob Atchley, who helped launch the Scripps Gerontology Center and served as its innovative director from 1974 to 1998, is putting the finishing touches on his 27th book, "**Spirituality in Aging: Expanding the View.**" The text, to be published by Johns Hopkins University Press (likely this summer), is targeted toward gerontologists and other academics as well as advanced practitioners in the field of spirituality.

Atchley, whose formal interest in aging and spirituality goes back 20-some years, notes the lack of a lexicon and other shared reference points for discussing spirituality in gerontology, and hopes that his book, which includes an 85-item Spirituality Inventory, will fill that void. "Almost by definition, spirituality is something hard to put your finger on," the former Miami professor notes. "It's abstract and can be difficult to discuss, especially in a scholarly manner. We need a theoretical framework to give a better context to our talk about spirituality, and my book aims to provide that framework – a conceptual hat rack of sorts – for people to hang their diverse spiritual experiences on."

For example, Atchley elaborates on the concept of what people commonly call a "spiritual experience." His book seeks to organize and clarify our understanding of such experiences: What qualities define a spiritual experience? Who has the capacity for such an experience? When and where do such experiences tend to occur? How do people grow and evolve from spiritual experiences, and in what ways does that growth

and evolution change them and their interactions over time?

"I think the gist of the book is best summed up in its subtitle, 'Expanding the View,'" Atchley observes. "Most gerontologists use an extraordinarily constricted view of spirituality in their research. But when you really look into it, spirituality is very rich and nuanced - and very interconnected with our life histories. I'd say there is a big mismatch between what older people are actually doing and thinking spiritually and the ideas academics use to study spirituality."

Atchley, a former president of the American Society on Aging and author of one of the first and most widely used textbooks in gerontology, "**Social Forces and Aging,**" retired in 2005 as Chair of the Department of Gerontology at Naropa University in Boulder, Colorado. But he remains active in the field of gerontology as a sought after speaker and consultant, as well as a researcher and writer. He already has another book - geared more for general readership - in the works, "**Growing Spiritually: Resources for a Spiritual Journey.**"

The prolific scholar confides that his interest in spirituality was fueled early by his grandmother's reading to him from "**The Golden Book of Bible Stories,**" and from attending an array of churches as a youth who lived in 14 states by the time he was 12 years old. "I could see very early the value of spirituality and how it fit into different religions," Atchley recalls. "I also loved and connected with nature as far back



Bob Atchley

as I can remember. Looking back, I probably had my first notable spiritual experience when I was six years old in church and singing, *This Little Light of Mine*. It clicked in me as I was singing, I actually experienced that light. And I've tried to put it to good use, in some way, ever since."

Twenty-seven books, more than 100 scholarly articles published and the kind, grateful and reverent words of countless students, colleagues and protégés – many of them still here at Scripps – provide resounding testament to the broad extent of that understated "good use."

As for that "little light," Atchley says he intends to let it go on shining as long as he does: "I've always loved my work; always loved the people I did it with; and the people I did it for. I'd be happy doing this forever."

# Scripps Research, Reports & Publications

## *Progress Reports*

### **Caregiver Monitoring Technology on Track**

The Scripps Gerontology Center's innovative research project on Caregiver Monitoring Technology is progressing encouragingly and on schedule, with approximately half of the 40 participating families recruited and installation of the monitoring equipment set for January and February.

The project is sponsored by the National Institutes of Health (NIH) to study the benefits of audio-video monitoring equipment and sensory devices in helping caregivers look after loved ones at home. NIH is expected to continue its sponsorship during the second year of this groundbreaking two-year research endeavor, headed by Jennifer Kinney and Cary Kart.

Working in conjunction with the Alzheimer's Association of Northwest Ohio and the Area Office on Aging of Northwestern Ohio (PSA 4), Jennifer and Cary have planned for the participation of 20 families who will use the technology and 20 families who will serve as a control group. The technological monitoring equipment will consist of audio-video cameras, and a range of sensors detecting noise, motion, open doors, open windows and operation of appliances, such as ovens, burners and coffee pots. Preliminary information on the progress of the research should be available this spring.

"Our thanks to the Alzheimer's Association and PSA 4 for their valuable help with the project, and, certainly, our gratitude to the participating families," Jennifer emphasizes. "This work may potentially benefit countless caregivers in the years to come, making

life considerably more manageable for them, and we're really excited about it."

### **Assisted Living Research/Evaluation Renewed**

The Ohio Department of Aging has renewed Scripps contract to evaluate Ohio's new (Medicaid-Waiver) Assisted Living program, now in its second year of operation, with 305 enrollees (400 are on the waiting list) and 70 providers. The new contract calls for Scripps to: review current literature on assisted living programs nationwide; profile participants and their satisfaction with the program; review and compare program costs; analyze and make recommendations for expediting the waiting list; identify alternative providers; and assess the overall effectiveness of the program. The Scripps first-year report on Assisted Living noted that clients were more impaired than PASSPORT clients, but not as impaired as those in nursing homes. Accordingly, the report also noted that the average monthly cost per-client, \$2,700, was higher than that for PASSPORT clients, but less than for nursing home residents. The research team is headed by Bob Applebaum and includes Valerie Wellin, Scott Brown, Heather Menne, Keren Brown Wilson, Shahla Mehdizadeh and Karl Chow.

### **Scripps Continues Ohio Long-Term Care Project for 15th Year**

The Ohio Department of Aging and the Ohio General Assembly recently approved funding for Scripps 15th consecutive year of providing the state with an overview and analysis of its long-

term care system. The report will provide state legislators and administrators with information on Ohio's nursing home population, nursing home occupancy rates, and costs of institutional care compared with care provided for older Ohioans in their own homes and communities. Last year's report, "The Changing Face of Long-Term Care: Ohio's Experience 1993 – 2005," noted that Medicaid expenditures constitute roughly one quarter of Ohio's annual budget and that long-term care represents 42 percent of the state's Medicaid total costs. The report also observed that Ohio spent \$2.8 billion in Medicaid on nursing home care last year, about three times more than it spent for Medicaid-reimbursed in-home care, ranking the state 47th in the proportion it spends for home care in relation to nursing home care.

Also, as part of the Ohio LTC Project, Scripps (and principal investigators Shahla Mehdizadeh and Denise Brothers McPhail) will publish early this year two of three reports included under the umbrella research titled: "If We Maintain the Status Quo, What Will Ohio's Future Demand Be for Formal Long-Term Care Services?"

The short answer to the above question is "Grim," as the demand will exceed our state's ability to adequately supply and fund LTC services. The first report, Disability in Ohio: Current and Future Demand for Services, estimates the number of people experiencing a disability in 2005, by age and type, and projects the size of the population with disability through 2020. Additionally, the report examines the

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## Scripps Hosts National Long-Term Care Business Institute

cont'd from pg. 1

- More in-home and community-based care choices for high risk older persons through nursing home diversion grants.
- Healthy lifestyles accented by “evidence-based” disease and disability prevention programs.

Following Burns to the podium, Bob Logan, Deputy Director of Operations and Membership Services for n4a, welcomed all in attendance, stating, “The aging network is changing, and it’s part of the mission and goals of n4a to create workshops like these. This is not designed as a gathering of ‘talking heads,’ but rather a sharing of ideas.”

At the Nov. 9 morning session, Burns announced an AoA goal of increasing Older Americans Act funds (now about \$1.3 billion, annually, not counting about \$480 million in yearly U.S. Dept. of Labor funds) across the board by at least \$100 million each year for the next 10 years, nearly doubling current funding. He encouraged AAAs and tribal organizations to act as advocates in this cause. While noting the need and value of nursing homes for older persons with severe impairments, the overall goal of AoA, he stressed, is di-



L-R Frank Burns, Bob Logan, Bob Hornyak, and Bill Ciferri

version of people from nursing homes who could be served at home and in the community. “Everything we do is targeted toward that mission,” he said.

Bob Hornyak, also representing the U.S. Administration on Aging, reinforced Burns’ message, telling attendees that “the environment is right” at the federal, state and local levels for gaining increases in the AoA budget to fully fund the *Choices* initiative. He urged that AAA and tribal organization representatives be clear and consistent with a message that will grow increasingly relevant as the older population of this country doubles in the next 30 years. “The message is that in-home and community services are what seniors want; it’s cost-effective; and *Choices* builds on

what the aging network is doing now.”

n4a contracted with Scripps in 2006 to head a \$1.34 million, three-year project to facilitate *Choices* via the establishment of the business center in addition to conducting a national survey assessing the AAAs (as well as Title VI programs) ability to implement the various components of *Choices*; initiating a provider inventory; and creating an orientation/training manual for AAA board and advisory council members. Scripps and the Marcum Conference Center will also host the second LTC business center, tentatively slated for May 2008. Two additional centers (for fall 2008 and spring 2009) are in the early planning stages.

Logan saluted Scripps for its work on the conference. “These conferences should go a long way in formalizing our approach to helping the area agencies and tribal organizations understand how best to implement *Choices* in their respective areas – how best to assist older Americans in living out their lives in their own homes,” Logan said. “We’re very grateful to Scripps for putting this all together so quickly.”

## Scripps Research, Reports & Publications cont'd from pg. 6

types of assistance that individuals who experience chronic disability receive. This report further explores the public and private costs of providing long-term care and support today and in the future. Estimates of future long-term care use are based on the assumption that current utilization patterns will remain constant over time.

The second report, *Disability in Ohio: Long-Term Care Settings & Services*, identifies all the components of Ohio’s long-term care system, and describes each facility and program, examines the capacity, utilization rate, client characteristics and the cost of care in each setting.

The final report, *Disability in Ohio: Scenarios That Could Alter Future Long-*

*Term Care Demand* (which should be completed this summer) examines how the demand for formal long-term care services in the future can be altered if the net migration rate, prevalence of disability among populations of all ages, the ability of family members to provide caregiving, and the preference of consumers for long-term care services, varies from what is currently observed.

## Age and Agency

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# Calendar

dates, meetings, conferences...

### Feb. 13

Brown Bag - 12:30 – 1:30 pm  
“Themes and Implications of  
Ethnographic Research on Paid Eldercare”  
Chris Wellin  
MacMillan Hall Great Room

### February 21–24

Association for Gerontology in Higher  
Education  
34th Annual Meeting and Educational  
Leadership Conference  
“Disciplinary Convergence: The Nexus of  
Gerontology and Geriatrics Education”  
Renaissance Harborplace  
Baltimore, Maryland

### March 27 – 30

NCOA-ASA Joint Conference  
“Aging in America”  
Washington, DC

### March 27 – 29

North Central Sociological Association  
“Common Situations - Complex Realities”  
Hilton Netherland Hotel, Cincinnati, OH

### Wednesday, April 9

Green Tea Day Fair - 10 am – 2 pm  
“Aging & Longevity Around the World” –  
Panel Discussion 2 pm  
Shriver Center Multipurpose Rooms A,  
B, & C  
Grandparents of Year Recognition  
Ceremony - 4:30 pm  
Shriver Center Heritage Room

### April 11

Ohio Association for Gerontology in Education  
“Global Aging: Lessons Learned from  
Abroad for Ohio”  
Cleveland State University

Miami University  
Scripps Gerontology Center  
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