



---

# BUILDING A LIVABLE AND SENIOR FRIENDLY NORTH CAROLINA STATE READINESS SURVEY

## ***Purpose***

Welcome to the State of North Carolina Aging Readiness Survey. This survey is intended to gather information from state agencies regarding how well we are prepared for meeting the rapidly evolving program and service needs related to the aging of the state's population and workforce.

## ***Executive Order***

North Carolina is undergoing a major demographic shift with the aging of its population with the nearly 2.4 million "baby boomers" representing more than twenty-five percent of our current population. In addition, the aging of our workforce will result in new opportunities and challenges. Under Executive Order Number 54, Governor Bev Perdue has called on her cabinet agencies and other state agencies to assess readiness for serving an aging population. The Division of Aging and Adult Services, Department of Health and Human Services and the Governor's Policy Office are working with the University of North Carolina Institute on Aging and the Governor's Advisory Council on Aging to administer and report on this assessment.

The assessment will include a review of the following:

- a. existing and proposed policies, programs and services specifically targeted toward older adults;
- b. other documents and initiatives that have examined the effect of an aging population on policies and programs;
- c. the participation of older adults, their families and caregivers in shaping relevant programs, policies or services;
- d. the participation of the private sector and local government in shaping relevant programs and policies; and
- e. other relevant items.

## ***Summary Results & Action Plan***

The NC Division of Aging and Adult Services and UNC Institute on Aging are collaborating to conduct this survey and will report the results to the Governor. The results will also be shared with all Liaisons, as well as the Governor's Advisory Council on Aging, and others in North Carolina who are engaged in preparing for an older population. This survey is also part of a larger effort to prepare the state for the unprecedented population shift. This larger effort includes gathering input from stakeholders statewide, holding public policy roundtables, and key presentations at the North Carolina Conference on Aging (October 13-15, 2010 in Research Triangle Park, NC).

## ***Directions for Completing the Survey***

The recipients of this survey are the Agency Liaisons identified to represent each state agency. Liaisons are expected to assume responsibility for completing this survey, but are encouraged to consult and seek assistance and answers from others within their organization in order to complete the survey. Multiple people can work on the survey, and it can be forwarded among staff. The survey can be edited and saved (on the user's computer) until ready for submission. It is expected that the survey should take approximately 2 hours to complete. The Liaison should coordinate input from all divisions and sections and ensure that the survey is completed and returned by the deadline.

## ***Deadline***

Once completed, the survey should be submitted electronically (instructions at the end of this document). **The deadline for submission is July 26, 2010.**

## SECTION A. CONTACT INFORMATION

*Please take this survey from the point of view of your “central” or home office, rather than from that of your constituent or sub-agencies. When we say “agency” we mean the central office of your department/division as they oversee planning for constituent agencies.*

1. Agency Name \_\_\_\_\_
2. Agency Liaison Name \_\_\_\_\_
3. Contact Information for Agency Liaison
  - a. Phone number: \_\_\_\_\_
  - b. Email address: \_\_\_\_\_
  - c. Mail address: \_\_\_\_\_

*Throughout the survey, we refer to “older adults.” For purposes of this survey, we want to know the definition of older adult that has meaning to your agency. If there is no particular definition of “older adults” relevant to your agency, choose the definition of older adult that makes the most sense for your organization. We also use the word “clients” throughout the survey to refer to all recipients of your programs and services (e.g. users, patrons, consumers).*

4. At what age does your agency consider a client to be an older adult?

- 45 and over
- 50 and over
- 55 and over
- 60 and over
- 65 and over
- Other, please specify: \_\_\_\_\_
- We have no standard definition
- We have multiple definitions

## SECTION B. FORMAL PLANS RELATED TO AGING

5. In the past **five years**, has your agency produced any documents such as plans, reports, or studies related to the effect of an aging population on your agency?

- YES
- NO (If no, please go to question 6 on the next page)

5.1 IF YES, please provide the information requested below for each item:

Description of item (e.g., title, type of document, purpose)	Date produced (mm/yyyy)	Web address for related documents (if available)

## SECTION C. WORKFORCE

*The workforce is aging in many sectors of the economy—most of the projected growth in the labor force through 2050 will be composed of workers aged 55 and over. This increase in older workers will influence the number of workers who retire based on age eligibility. With this said, many workers will have to retire later to supplement the private (if any) and public components of their retirement income. In this context, age may not be as strong of a determinant of workforce exit. This workforce aging will impact the organization of work across organizations.*

Please answer the following questions about **your agency's** aging workforce, looking ahead to **5 years from now (2016)**:

6. We know the number of employees eligible to retire in our agency in the next 5 years.

- YES
- NO

7. We know which departments/units will likely experience the highest proportion of retirees.

- YES
- NO

8. We know which departments/units will likely experience the most critical skills/knowledge loss.

- YES
- NO (If no, please go to question 9)

8.1 If YES, select the answer that best describes your preparedness:

- We know that we will not have any critical shortages based on retirement projections.
- We have not yet begun working on a plan to address critical skills/knowledge loss.
- We are working on a plan to address this skills/knowledge loss.
- We have a plan to address this skills/knowledge loss.

9. While definitions of older workers vary, please use age 55 and over for this question. Do older employees transfer knowledge (e.g. mentoring, shadowing) to younger employees as a formal part of their job?

- YES (If YES, please answer 9.1 and 9.2 below)
- NO (If NO, please answer 9.3 below)

9.1 IF YES, is this knowledge transfer (e.g. mentoring, shadowing) part of a larger preparedness plan in your **agency**?

- YES
- NO

9.2 IF YES, is this knowledge transfer (e.g. mentoring, shadowing) part of a larger preparedness plan in your **department**?

- YES
- NO

9.3 IF NO, Are you planning to implement a knowledge transfer (e.g. mentoring, shadowing) program?

- YES
- NO

10. Are there any human resource policies or practices that make it **difficult** to retain older workers?

- YES
- NO

10.1 IF YES, please describe \_\_\_\_\_

11. Are there any human resource policies or practices that make it **easier** to retain older workers?

- YES
- NO

11.1 IF YES, please describe. \_\_\_\_\_

12. Are there any human resource policies or practices that make it **difficult** to hire back retirees to meet skills/knowledge needs?

- YES
- NO

12.1 IF YES, please describe \_\_\_\_\_

13. Are there any human resource policies or practices that make it **easier** to hire back retirees to meet skills/knowledge needs?

- YES
- NO

13.1 IF YES, please describe \_\_\_\_\_

14. Does your agency regularly offer your staff the following? (Check ALL that apply)

- telecommuting
- part-time work
- flexible work hours
- flexible work places
- on-site child care
- elder care information
- job sharing

15. Does your agency have any volunteer programs that engage older adults to extend the capacity of your workforce?

- YES
- NO (IF NO, please go to question 16)

15.1. If YES, in what capacity have you engaged older adults? (Choose all that apply)

- Clerical/administrative support
- Routine non-skilled tasks (e.g. envelope stuffing, meal delivery)
- Advisory committees/boards
- Instructors/Educators (e.g. docents)
- Honorary roles based on work, education or life experiences (e.g. veterans)
- Other \_\_\_\_\_

16. Does your agency have any staff member(s) who have a percentage of their time designated for preparing for an aging workforce?

- YES
- NO (IF NO, please go to question 17)

16.1 If YES, identify the staff member(s), and briefly describe their role/title. If you have more than three, please list the top three as reflected on an organizational chart.

Staff Member Name	Role/Title

17. Ongoing developments in technology are reshaping work processes, the content of jobs, the place where work is done, and the delivery of education and training. Workers will increasingly need to engage in lifelong learning to accommodate the changes in jobs stemming from technology, such as new hardware, software and communication tools. Skill acquisition in older adults is critical in helping older workers adapt to new technologies. Does your agency have any education programs about technology **targeted at your own employees**?

- YES
- NO

17.1 If YES, please describe \_\_\_\_\_

## SECTION D. SERVICES AND PROGRAMS FOR OLDER ADULTS

*As the number of older adults increases, there will be a growing demand for more and expanded programs and services across most agencies. We are interested in how you are preparing for this increase in demand, if it applies to your agency.*

18. Do you track changes in client demand for programs and services?

- YES
- NO
- NOT APPLICABLE TO MY AGENCY

18.1 If yes, can you isolate changes based on client age?

- YES
- NO

19. Does your agency anticipate an increase in demand for your programs and services?

- YES
- NO (IF NO, please SKIP to question 24)
- NOT APPLICABLE TO MY AGENCY (IF NOT APPLICABLE, please SKIP to question 24)

20. In the **last five years**, have you made any changes to how you implement **programs and services** for older adults to accommodate this increase in demand?

- YES
- NO
- NOT APPLICABLE TO MY AGENCY

21. Does your agency have any agency-level policies and/or practices to increase the number of employees based on the increased need for programs/services?

- YES
- NO

21.1 If yes, please describe. \_\_\_\_\_

22. In terms of an increase demand for programs and services in the **next five years**, select the answer that best describes your preparedness,

- We have not yet begun working on a plan to address this increase in demand.
- We are working on a plan to address this increase in demand.
- We have a plan to address this increase in demand.

23. Does your agency have any staff member(s) who have a percentage of their time designated for preparing for this increase in demand for programs and services?

- YES
- NO (If NO, please go to question 24)

23.1 IF YES, please list the top three persons in terms of their position on the organizational chart, and briefly describe their role/title.

Staff Member Name	Role/Title

24. Does your agency directly solicit the views of older adults, their families, or caregivers, in helping shape programs and services?

- YES
- NO (If NO, Please go to question 25)

24.1 If YES, please how do you solicit the views? (Check all that apply)

- Client surveys
- Focus groups
- Advisory Committee
- Public hearings/Listening sessions
- Other \_\_\_\_\_

25. Does your agency sponsor any education programs that are aimed at helping older adult use technology?

- YES
- NO
- NOT APPLICABLE TO MY AGENCY

25.1 If yes, please describe. \_\_\_\_\_

26. Does your agency collaborate with other organizations (including private sector) in planning for and responding to the aging population?

- YES
- NO (IF NO, please GO to question 27)

26.1 If YES, with what types of organizations do you collaborate? (Check all that apply)

- Other government agencies
- Private non-profit organizations
- Private for-profit organizations
- Other \_\_\_\_\_

26.2 IF YES, please name the three organizations you collaborate with most often:

a. \_\_\_\_\_

b. \_\_\_\_\_

c. \_\_\_\_\_

27. Are there other organizations with which you **want** to collaborate, but have not yet done so?

- YES
- NO

27.1 If YES, please name them: \_\_\_\_\_

## SECTION E. USE OF TECHNOLOGY & ADAPTIVE DEVICES

*Technology is used and adapted to meet the many needs of older adults in maintaining quality of life and independent living. Examples of these technologies includes tele-medicine, adaptive devices, such as hearing aids and screen readers, medical alerts, prosthesis and other smart technologies related to maintaining health and independence.*

28. Has your agency made changes in how you inform, support or deliver any such technologies (described in box above) to meet the needs of older clients?

- YES
- NO
- NOT APPLICABLE TO MY AGENCY

28.1 If NO, does your agency have any plans to make changes in the ways you inform, support or deliver such technologies to meet the needs of older clients?

- YES
- NO
- NOT APPLICABLE TO MY AGENCY

28.2 If YES, please describe. \_\_\_\_\_

## SECTION F. BUILT ENVIRONMENT

*With increased age, there is a greater likelihood that the clients you serve, including those with disabilities, functional limitations, and other changes due to normal aging will need to have accommodations that might include improved access to transportation, buildings, walkways, parking, zoning, and home/office modifications.*

29. In the **past five years**, has your agency made any physical or other improvements, such as ergonomics, lighting, and screen size to accommodate such changes for **your staff members**?

- YES
- NO

29.1 IF YES, please describe. \_\_\_\_\_

30. In the **past five years**, has your agency made any physical or other improvements, such as ergonomics, lighting, and screen size to accommodate such changes for **your clients**?

- YES
- NO
- NOT APPLICABLE TO MY AGENCY

30.1 IF YES, please describe. \_\_\_\_\_

31. In the **past five years**, has your agency made any improvements to increase access to public transportation for **your staff members**?

- YES
- NO

29.1 IF YES, please describe. \_\_\_\_\_

32. In the **past five years**, has your agency made any improvements to increase access to public transportation for **your clients**?

- YES
- NO
- NOT APPLICABLE TO MY AGENCY

30.1 IF YES, please describe. \_\_\_\_\_

## SECTION G. LOOKING TO THE FUTURE

*In the process of developing this survey we have identified several main issues related to an aging population that are likely to impact state agencies. We would like you to rate the level of challenge you face regarding these issues in the next five years.*

33. Using a scale from 1 to 5, please rate each of the following. Over the **next five years**, 1 indicates that it is not at all a challenge for your agency and 5 indicates that it is the most difficult challenge you face in executing your mission.

Not at all a challenge	.....	Medium Challenge	.....	Very High Challenge	.....	n/a
1	2	3	4	5		

Planning for an aging workforce		
Changing your agency's built environment to accommodate <b>worker</b> needs (e.g. physical or other improvements such as ergonomics, lighting, or screen size)		
Changing your agency's built environment to accommodate <b>client</b> needs (e.g. physical or other improvements such as ergonomics, lighting, or screen size)		
Improving use of technology and adaptive devices		
Meeting the increased need from older adults for more and expanded programs and services		

34. If there are issues we have not explored in this survey, please write them in and rate them using the above scale.

Not at all a challenge	.....	Medium Challenge	.....	Very High Challenge	.....	n/a
1	2	3	4	5		

Additional Issues (write in)


35. What are the most successful programs or activities underway (at your agency level) to assist **local communities** in their preparedness and response for the aging of our population? If you are not working with local communities this way, please SKIP to question 36.

36. If you have additional comments or questions, you can add them here:

**Please continue to the next page**