



**Impact of the
Aging Baby Boom
Population
on Palo Alto's
Social and Community
Services**

White Paper for Discussion
November 2006



Introduction

This study endeavors to assist Palo Alto's City government, local nonprofit agencies, and the community at large in understanding some of the impending impacts of a rapidly changing demographic environment driven by the aging of the Baby Boom Generation. These evolving trends will result in dramatic differences in the characteristics and needs of our residents, and these changes will undoubtedly have an impact on policies, programs, services and practices within our community.

This analysis was initiated by the Community Services Department of the City of Palo Alto and was undertaken by a Task Force of community leaders and service provider agencies. The study does not claim to be scientific or scholarly. Instead it is a surface exploration of the issues and a call to action proclaiming that now is the time to understand and plan for the inevitable.

The White Paper purposely focused on lifestyle issues including education, recreation, health, fitness, leisure and social services. It does not attempt to delve into medical, emergency preparedness, safety and consumer services. These are concerns that demand their own stage.

Need for the Study

There are many reasons why it's important to understand the future lifestyle and social service needs of this burgeoning population including financial, community planning, transportation and social service implications. It is imperative that we begin planning for these now, before they overwhelm the resources of many of our public and non-profit service providers.

Palo Alto's population profile has already begun to transform due to significant demographic and social trends:

- The aging of our population with the impending passage of the massive Baby Boom generation into the elder cohort, and
- The increasing longevity of the population due to medical advancement and healthier lifestyles.

Given these facts, one of many reasons for initiating a planning strategy is articulated in research conducted by the National Research Center Inc. (NRC) of

Boulder, Colorado. The NRC analyzed data from 9000 surveys of older adults. The study made a direct correlation between the number of community “strengths”, defined as physical health, outlook on life, and social and family connections, with the number of hospitalizations, institutionalizations and accidents. In short, the study determined that if a community can provide its people the opportunity to “age well” it can save untold hardship and millions of dollars in unnecessary costs.

A second key reason for the study is to begin to identify the resources and opportunities that will come with our aging population. By anticipating the future needs of employers and public agencies, and through appropriate recruitment and training techniques, a new workforce may be discovered, bringing with it wisdom and experience not previously seen in previous generations of elders.

The goal of this paper is to attempt to describe some very real social issues and opportunities, identify some of their impacts and begin a dialogue on how best to find appropriate solutions.

Executive Summary

It's no secret that America is graying. Newspaper, television, magazines, government and scholarly reports tell us that the first wave of the Baby Boom generation is now entering into their retirement years and that we are on the threshold of a major shift in demographic characteristics. In the next thirty years our nation's "senior" population will double due to the sheer size of the Boomer generation and, thanks to medical and health advancements, will live longer than any previous generation.

But what about Palo Alto? What will the impacts be to our community and social service delivery systems? Do we need to prepare for these impacts, and if so, what do we need to prepare for? Can we be a community that is "elder friendly"? These are just some of the questions that prompted a nine month examination of this issue by a Task Force of City and nonprofit community and social service providers.

What was discovered in many ways mirrors the national landscape. Boomers will live longer, be more active, have more money to spend, and hold great political clout. Our future population will not only be older - but they will also think differently than past generations. If anything, they will be more socially and culturally engaged, healthier, have increased mobility and be more independent.

How will Palo Alto be impacted? From input provided through a community visioning meeting and a community-wide survey, the thoughts and concerns of some 400 Palo Alto Boomers can be summarized as follows:

- **Boomers want to live independently as they age and the concept of a "senior friendly" environment, especially with regards to mobility, is especially important.**
- **There is a deep desire to be engaged in community and social activities and have a variety of learning opportunities.**
- **Palo Alto Boomers want to stay involved, for either lifestyle or financial reasons, through volunteerism or continued part or full-time employment.**

- **Our Boomers want to remain physically and mentally active and healthy, well into their elder years.**

Also, a key finding that could greatly impact the Palo Alto community is that *80% of our Boomers say they are planning to stay in Palo Alto as they age*. If true, in the next twenty years, and given the fact the Palo Alto is generally considered residentially built-out, the percentage of our older population will outpace all other demographic segments, creating a scenario where upwards of 40 percent of our total population will be 55 years of age or older. Consequently, the service delivery implications may be challenging, especially when you consider the fastest growing population segment will be those age 85 and older. This group will require an unequaled level of support services, placing great demand on public and private support agencies.

Another key factor is whether our Palo Alto based agencies are prepared to meet the service delivery impacts brought on by the aging of the Boomer generation. Palo Alto is currently blessed with outstanding services for older adults including those provided by Avenidas, La Comida, Palo Alto Family YMCA, and the Albert J. Schultz Jewish Community Center (JCC). But are these institutes prepared to meet the challenges of the future? Avenidas, Palo Alto's largest, full service provider for older adults, has already found its assets strained by the needs of the changing population. Both the JCC and YMCA have unused capacity (the JCC will expand services when it moves to a new campus in 2009), but both organizations indicate the need is increasing. The La Comida nutritional program is at capacity and already requires more space and staffing resources. And, although providing a full spectrum of adult lifestyle activities, the City of Palo Alto devotes a very small percentage of its community services budget to older adult programs.

Of course, with change comes opportunity. Our Boomers will possess the highest educational level of any past generation, and as revealed through our survey, they have a desire to continue to work and volunteer in the community. With appropriate training and through creation of policies and education to end "age discrimination", the harnessing of this intellectual and skilled labor force could truly be beneficial for the entire community.

This White Paper suggests strategies to meet the projected impacts and make the best of the opportunities that are before us. Where we go from here is up to our community, and over the next few years our government, nonprofit and business sectors will need to better understand the unique needs of this burgeoning generation and answer the questions:

- *Given a strained financial environment, is there a way to better distribute our public resources to meet the needs of our Community?*
- *What changes do we need to make in the City's physical attributes that will allow people to age well and safely?*
- *What planning must happen now to meet the anticipated social and community service needs 10, 20 and 30 years from now?*
- *How can we best use the human resources that come with the numbers, experience and education of the Boomer population?*

This study calls for the development of a strategic plan to address these questions and to determine the opportunities inherent with the aging of the largest generation in America's history. We, as a community, must begin to find answers to these questions now because these inevitable and dramatic demographic changes are happening - now

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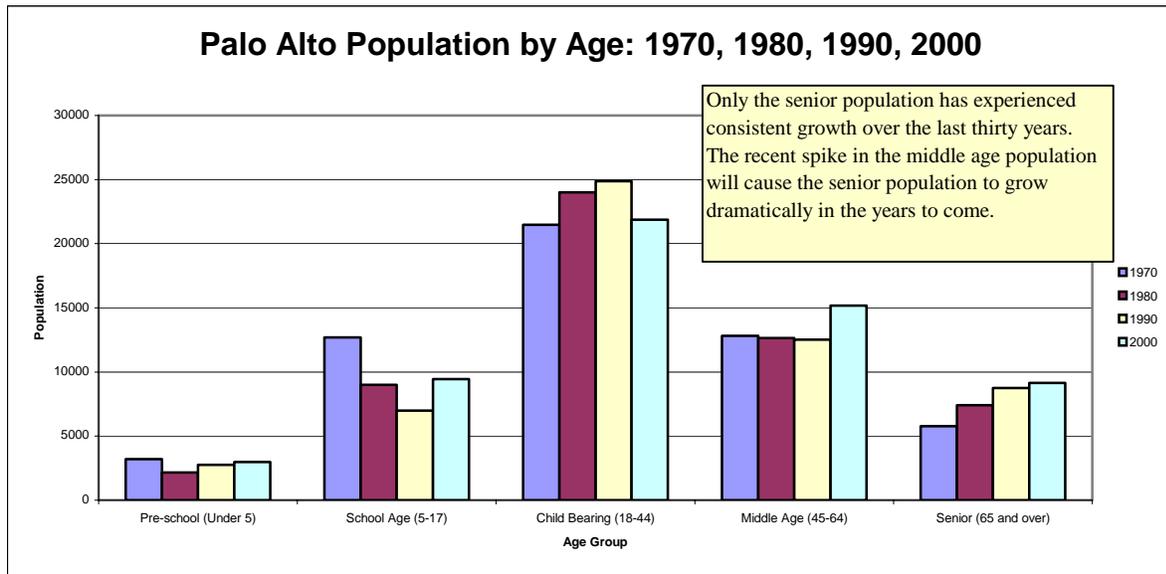
Current Population Trends

The Boomers Are Coming!

The 76 million 'Baby Boomers' born between 1946 and 1964 represent the largest birth cohort ever in the United States. The first of the Boomers turned 60 this year and by 2030 all surviving Baby Boomers will be between the age of 66 and 84 and will represent one of every five Americans¹. America's Boomers make up 27.5% of the population, have an estimated annual spending power of \$2.1 trillion, and comprise 45.8 million households with average spending of \$46,000 per household.

¹ Excerpt from the State of California "SB 910 Strategic Plan for an Aging California Population", 2003

Palo Alto is already experiencing the profound impact of this “graying of America” trend. Between 1990 and 2000, as a result of the out migration of young adults and the aging of Boomers, the Palo Alto population of 45-60 year-olds increased from 17.5% to 22% of the total population.² Indeed, the middle age and senior populations are the only segments in our community that have grown significantly over the past thirty years.

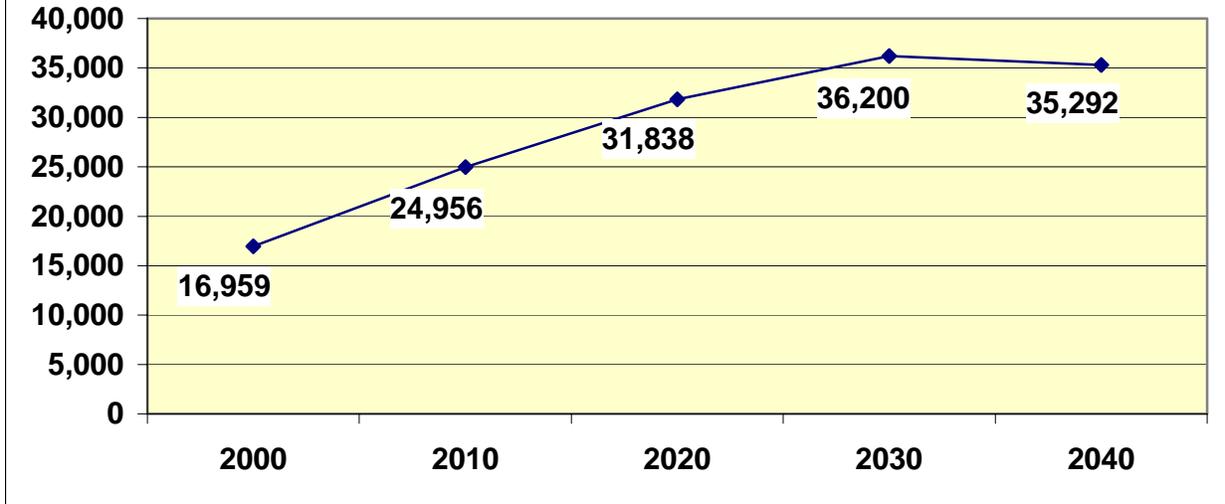


As the Boomers continue to age, they will cause the senior percentage of the population to grow even more dramatically. Between 2000 and 2030, Palo Alto’s population of older adults (age 55 and above) could more than double to over 36,000. Because the total population of the City is unlikely to double over this timeframe, we can expect a significantly higher percentage of older adults in our community.

These projections assume no out migration, as no statistics are available. However, in our survey of 323 local Boomers, 80% reported that they intend to stay in Palo Alto when they retire. If this percentage is anywhere close to reality, we could expect the senior population of Palo Alto to be approximately 36,200 by 2030, which represents a 113% increase.

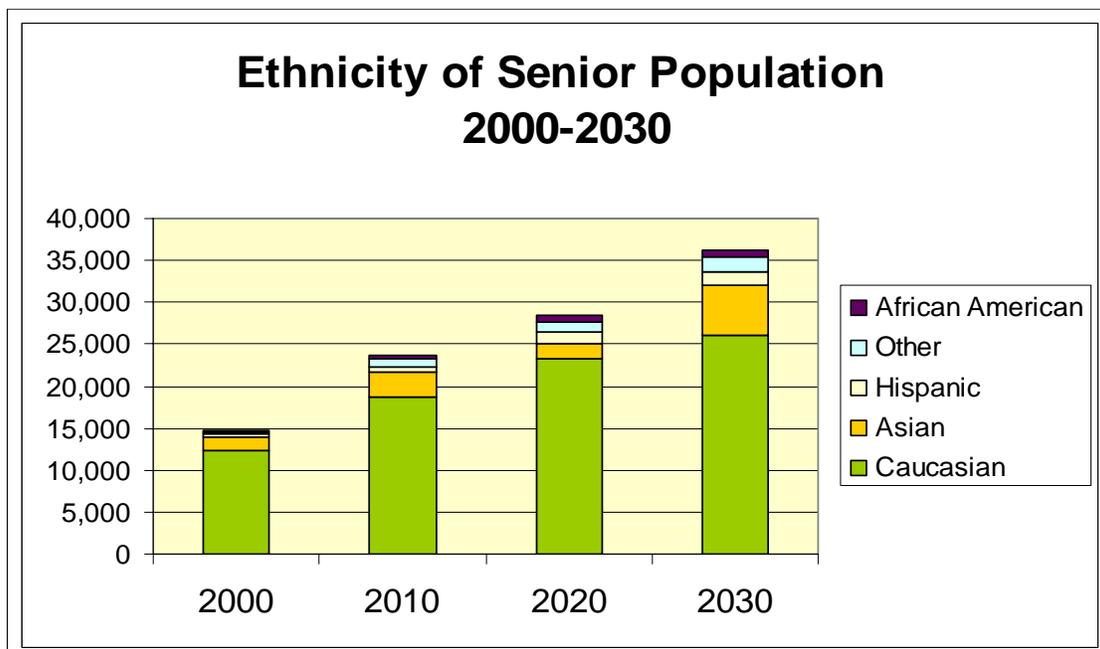
² Excerpt from “City of Palo Alto Community Profile”, July 2005

Projected Growth in Palo Alto's Older Adult Population (age 55+)



The next senior population will be more ethnically diverse as well. At present, about 80% of the Palo Alto senior population is Caucasian and 11% Asian. Over the next thirty years, an increasing percentage of this population will be Asian and, to a lesser extent, Hispanic. (Note: Projections extrapolated from U.S. Census data) Our community must adapt its services to appeal to the different needs and interests of these groups.

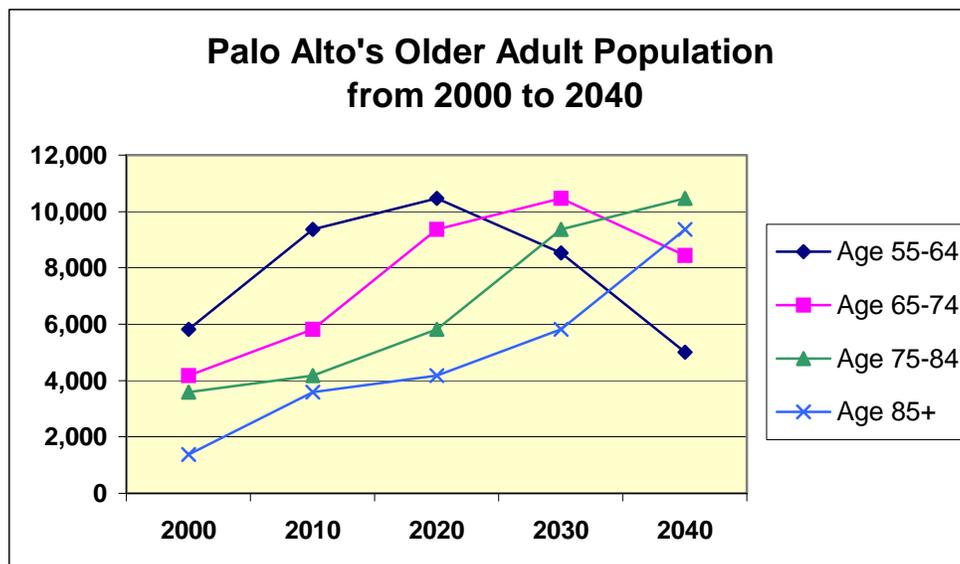
Ethnicity of Senior Population 2000-2030



Differences Between Generations

Within the older adult population, it is important to distinguish between the “young-old” (those less than 75 years of age), the “old” (75 to 84 years of age), and the “old-old” (85 years of age and older) and to plan for a more ethnically diverse older population.

The California Policy Research Center at the University of California expects the average life expectancy to be 81 years of age by 2020. In 1980 the mortality rate was 73 years. Because of this increased longevity, the greatest growth will be among the oldest Palo Altans, the “old-old” seniors. By 2040, this group will represent more than one quarter of the city’s older residents, up from one in ten in 2000. The “old-old” population will outnumber the “young-old”. Old-old seniors will need the most supportive services and practical help and is likely to have the lowest incomes, placing great demand on the city and those organizations that provide services to them.



Within the “young-old” group, the very definition of “old” is likely to change in coming years. This group will be more mobile and healthier. Its changing expectations, discussed below, will alter our thinking about what is meant to be “old” or a “senior”. Chronological age will become less of a determining factor in what one considers “old”. Instead, functional ability is likely to become more of a determinant, and may become a more relevant criterion for eligibility for public benefits and demand for services. In this way, older adults will be less likely to seek out services and activities designed for others of the same age, and

more likely to participate in activities with people – of all ages - who are similarly mobile and healthy.

The cultural differences between those born in the period 1911 to 1945, and the Baby Boomers born after 1945, are striking, and help us predict how the interests, expectations, and desire for services will change as Palo Alto's Baby Boomers age.

Many of those currently over the age of 60 served in World War II, may have witnessed the Great Depression, and through their labors created the booming economy of the 1950's and the rise of the middle class. Their experiences taught them the value of hard work, self-sacrifice, discipline and team spirit. This generation learned to rely on the government and has an expectation that the government will take care of them. Indeed, Social Security gave this generation unprecedented economic security, and they were the first to experience mass retirement and transition to a period of life dominated by leisure. This generation is conservative, risk-averse and conformist.

The Baby Boomer generation, on the other hand, grew up in a period of unprecedented prosperity and unlimited horizons. They disdain authority and traditional values, and prize their individuality. Boomers want to have it their way, have it now, and enjoy the experience. William Novelli, Executive Director of AARP describes them this way:

“Basically, boomers like to have fun...They are looking for the new experience. They want to create their own experiences, because in this “been there, done that” world of today, they are often bored, and searching for novelty.”³

Boomers do not associate age with disease and disability; indeed, they have every reason to expect to live longer and healthier than their parents. But they do not take their health for granted and, for them, wellness is very important. This generation wants fitness activities, recreational resources, nutrition, and information about preventative health care and healthy living. But for this very same reason, Boomers tend to be in denial about - and generally are not planning for - the reality that in their latter years they may well experience disability and chronic disease. Undoubtedly, an increasing number of the “old-old” will need supportive services such as in-home care and adult day care to remain in their homes.

³ From “How Aging Boomers Will Impact American Business”, a speech to The Harvard Club by William Novelli, Executive Director and CEO, AARP, February 21, 2002.

The needs and expectations of Boomers will be diverse, and they will demand choices. This is not likely to be a generation that seeks out - at least in the short run - the institutions and services that have served their parents so well. Terms like "senior centers" and "old age homes" are quickly becoming obsolete and are being replaced with terms like intergenerational centers and asset-based aging.

There are other differences between Boomers and their parents. They "see retirement as a transition; not a termination."⁴ AARP research has shown that 8 in 10 Baby Boomers plan to work at least part-time. Of that percentage, 35% of them will work mainly for interest and enjoyment, and another 17% would like to start their own business. Given the very high cost of living in this area, many local Boomers will be motivated to work to augment their income to make it possible to remain in the area. Boomers expect to need more money during retirement, and plan to spend it to enhance their lifestyles.

There are also indications that as Boomers seek to remain productive in their retirement years they will turn to volunteering and civic engagement in large numbers. Our survey of Palo Alto Boomers confirms this national trend. In answer to the question "*When you have more free time, what do you want to do with it?*" 42% of the respondents answered that they want to volunteer in the community.

It will be a challenge to the service sector to offer volunteer work that gives Boomers new experiences, the opportunity to work independently and, above all, many choices. If local institutions are successful in engaging Boomers in community work, they will be greatly rewarded as Boomers direct their considerable talents and energies to addressing some of the community's problems.

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⁴ From "How Aging Boomers Will Impact American Business", a speech to The Harvard Club by William Novelli, Executive Director and CEO, AARP, February 21, 2002.

Local Survey

Palo Alto's Boomer Landscape

Although there has been much information disseminated on the demographics and characteristics of Boomers on a national and state scale, there is relatively little information describing the characteristics of Palo Alto's aging Boomers. In order to understand what these Boomer's needs and concerns are, three methods of obtaining information were used by the study Task Force; a community input event, a written questionnaire, and a survey instrument.

Community Input Event

The Task Force hosted a "Community Visioning Meeting" where residents of Boomer age were asked to participate in a two-hour discussion led by noted facilitator, Diana Schlott. The public meeting was designed to give participants an opportunity to share their perspectives in an open and engaging environment. The meeting was held on May 11, 2006 at the Art Center Auditorium and 48 Palo Alto residents participated.

Following an introduction as to why the meeting was being hosted, and a brief presentation on the history of 20th century generations, the participants were divided into small discussion groups. Each group was given two questions to discuss and report out on. Groups were then asked to develop consensus on the top five answers for each question. The questions asked were:

- A. What are the services and programs that you're presently using that you'll need more of in the future?*
- B. What new services may be required in order to allow you to age well?*

Due to time limitations, participants were also requested to complete a written questionnaire that asked:

- 1. Are you planning to stay in or near Palo Alto when you retire?*
- 2. If you're planning on moving to another location in your next phase of life, what would make you stay in Palo Alto?*
- 3. When you have more free time, what do you want to do with it?*
- 4. If you knew you'd live to be 100 years old, what would you do differently?*

Our Community Talks: Concerns and Desires

Group discussions were lively and a great many ideas and themes emerged. The following summarizes the most prevalent themes that surfaced from the dialogue:

- **When asked to identify the services and programs that Boomers are presently using that they will need more in the future, a variety of services and programs were identified. The five major themes, in order of priority, that dominated the discussion were:**

1) Social, Cultural and Leisure Activities

Examples cited most frequently were travel; activities at night for adults/seniors; activities for widows/widowers; creative arts classes; book clubs; Stanford Lively Arts; inter-generational interaction; dance groups; poetry nights; art and theater events; open microphone; and increased social gathering points.

2) Parks and Recreational Services and Facilities

Within this theme the most mentioned uses were activities that draw people to parks; lawn bowling; Tai Chi; playgrounds for seniors; senior and community centers; a golf club for Boomers; and sports leagues for seniors.

3) Senior Designed Community/Social Services

Examples cited included buddy systems for walking, hiking and exercise; quality Police, Fire and EMT services; food closets; outreach for shut-ins; social services targeted at aging; walk-able neighborhood shops and services; universal housing concepts⁵; and vibrant downtown neighborhoods.

4) Education and Library Services

Some of the specific services and programs identified as important were readings clubs; technical classes; quality library facilities and programs; Palo Alto Adult School; City-sponsored special interest classes; Stanford continuing studies; and Foothill College.

5) Information and Referral Services

Examples for information and referral programs included continued communication about programs for adults; easy, single point access to information on caregivers; technology services; Medicare advice; tax preparation

⁵ A set of accessibility features such as zero-step entrances, wide interior doors, and accessible bathrooms.

assistance; and the need for a Palo Alto-based website for volunteer opportunities and services.

Other themes included health care/in home services, and health and fitness programs.

➤ **The next question asked participants to think about their future. When asked to identify “What new services may be required in order to age well” the themes that gathered the most responses were:**

1) Transportation

By far, a transportation and mobility theme resonated the most with the group. Examples cited included a “safe ride” program; bike sharing; more bike paths; car sharing; mass transit that gets “closer to home;” opportunities for electric wheelchairs to use bike lanes; more public transportation; increased frequency of the City and Stanford University shuttle; transportation to distant parks; a cross-town trolley on Middlefield Road; and the need for volunteer drivers in lieu of para-transit services. Much discussion was devoted to keeping ones’ independence, whether or not an automobile was available.

2) Social, Cultural and Leisure Activities

Also ranking very high in interest was social, recreational and leisure activities including references to intergenerational activities, connectivity, social support groups, interest-based activities vs. age-based activities, more daytime activities, senior related activities, and social integration. Participants abhorred the idea of isolation and loneliness, and in general, wanted to be active and share life experiences with others.

3) Parks/Recreational Facilities and Programs

Examples cited for new services for parks and recreation facilities included “younger” senior centers (a blending of adults and elders); more locations for Avenidas; libraries as combined community centers; multi-generational community centers; senior-friendly camping sites; additional off-leash dog areas and trails; more recreational services like the YMCA; and recreational membership fees reduced for those 50 plus.

4) Senior Designed Communities/Social Services

Within this theme some of the ideas that emerged were identifying homebound individuals in case of emergencies; “assisted living without walls”, farmer’s markets in additional areas of town; more home care services, meal delivery services; programs to address loneliness and isolation; transitional services;

neighborhood access to shopping and services; and centers for basic services located throughout town.

5) Education and Libraries

Some of the examples characterizing this theme included learning new languages, educational programs about health and welfare, life-long learning classes, providing a “living history” with Boomers presenting their histories in schools, teaching, mentoring and training opportunities for older adults, the provision of larger print books at well-designed libraries facilities.

Outside of the five themes noted above, housing, assistive living and health and fitness programs were also concepts that emerged during discussion.

Participants were also asked to complete a written questionnaire:

1. When asked the question, *“Are you planning to stay in or near Palo Alto when you retire?”* 76% of participants said they planned to stay in their present home.

2. When asked *“If you’re planning on moving to another location in your next phase of life, what would make you stay in Palo Alto?”* the two factors most frequently cited were affordability and better public transportation.

3. For the question *“When you have more free time, what do you want to do with it?”* the focus was on travel, volunteering, lifelong educational opportunities, spending time with friends and family and staying mentally and physically fit.

4. When views on the question *“If you knew you’d live to be 100 years old, what would you do differently?”* were solicited, the major themes that emerged were keeping in better mental and physical health, and saving more money for retirement.

It’s noteworthy that throughout most of the discussion, Boomers wanted us to know that they did not want to be “pigeon holed” when it came to the provision of services. In other words, Boomers want choices and the opportunities to participate in most activities according to interests, not age.

A Community Survey

The method used to collect quantitative data was through the use of a survey instrument. Due to funding limitations, the survey was not of scientific design, but was meant to build upon and test the information gathered at the community visioning meeting. The survey was made available in hard copy and through the Internet using the Web tool, *Web Surveyor*. The survey was advertised through newspapers, email “blasts,” and through newsletters to the constituents of our participating Task Force organizations.

323 surveys were received over a six-week period from Palo Alto resident “Boomers.” To ease the completion of the survey, participants were asked to prioritize specified service themes, which included:

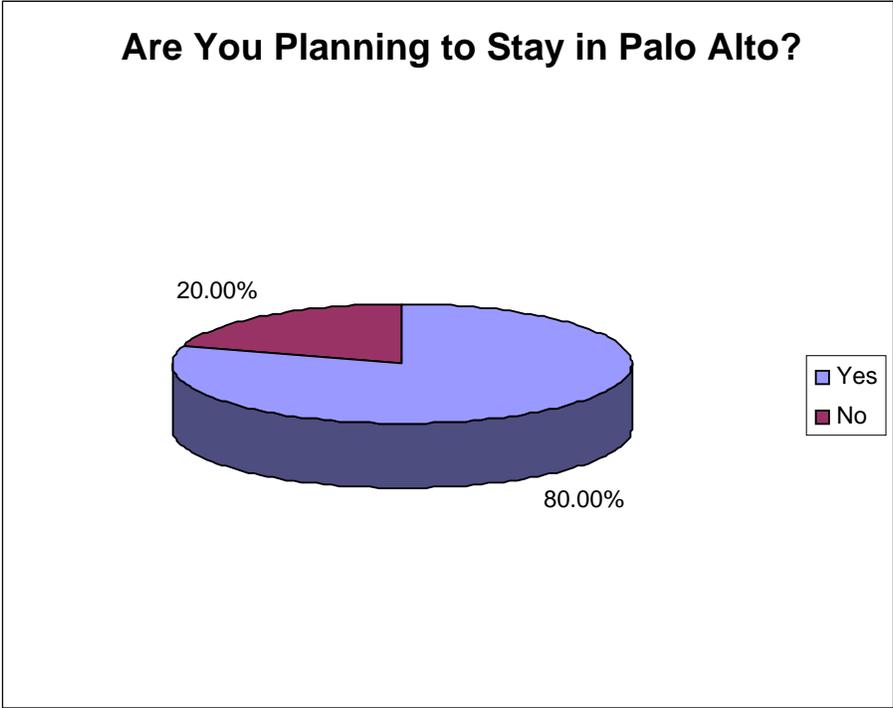
- **Career/Volunteer Opportunities:** full/part time jobs, job banks, career placement, volunteer listings, etc.
- **Civic Engagement Opportunities:** including running for office, board and commission work, advocacy, inter-generational exchanges, political activism, etc.
- **Education & Libraries:** opportunities for advanced degrees, life-long learning, classes and workshops, library facilities and services, collections, reading clubs, lectures, book mobiles, etc.
- **Housing & Assisted Living:** affordable housing, more housing options, assisted care facilities, in-home care services, day-care programs, home repair services, etc.
- **Financial Assistance & Planning:** senior/low income discounts, financial information & referral, financial planning services, financial counselors, etc.
- **Health & Fitness Opportunities:** health clubs, yoga & other fitness classes, nutritional programs, gyms, aquatics, par-courses, senior sports leagues, in-home fitness services, etc.

- **Information & Referral Services:** health, social services, emergency services information services, more information distribution points, one stop shopping for information, life counselors, etc.
- **Parks & Recreation Facilities:** urban and open space parks, enhanced community center facilities, senior centers, athletic fields & facilities, golf course, meeting rooms, etc.
- **Senior Designed Communities:** walk-able neighborhoods, support groups, neighborhood services, universal design concepts, etc.
- **Social, Cultural & Leisure Activities:** theatre, arts, special events, social gatherings, travel, clubs, etc.
- **Transportation:** public transportation alternatives, safer roads and pedestrian access, shared transportation, bike lanes, shuttle services, etc.

Key Finding From the Survey

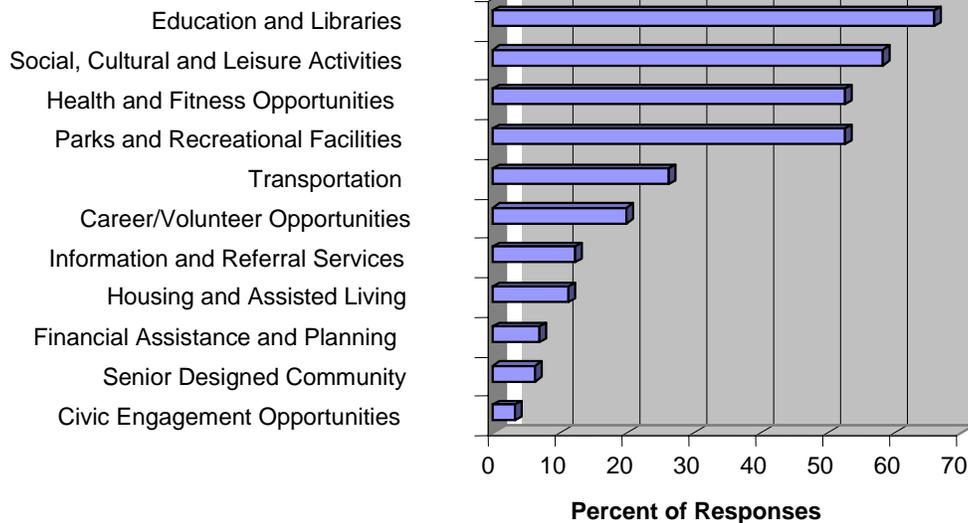


The 323 survey participants were fairly divided between older Boomers, born between 1946 and 1955 (58%), and those born between 1956 and 1964 (42%). It should be mentioned that this outcome was significantly different from the participation at the community input meeting where 83% represented the first decade of the Boomer generation.



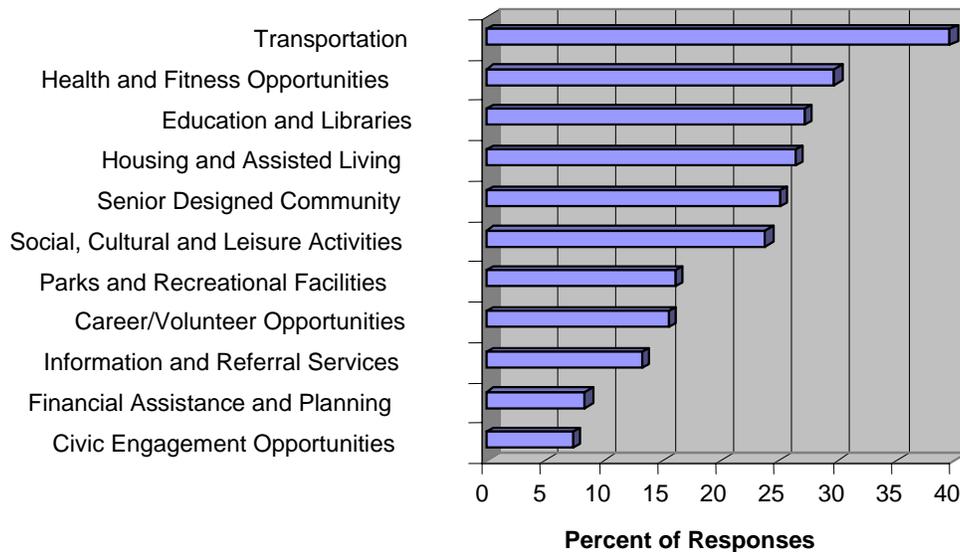
Survey data and community meeting input were quite similar when asked if Boomers planned on staying in Palo Alto after retirement. Eight out of ten of our Boomers said they planned to continue residing in Palo Alto, echoing data from many previous surveys that predict “Aging in Place” will continue to be the preferred choice of older adults. The data also suggests that housing turnover will slow, making it more difficult for younger families to move into an already built-out city. This phenomenon may also have serious impacts on living arrangements, housing services, and result in an increased need for local elder care, support services and assisted living.

What Services Do You Currently Depend On?



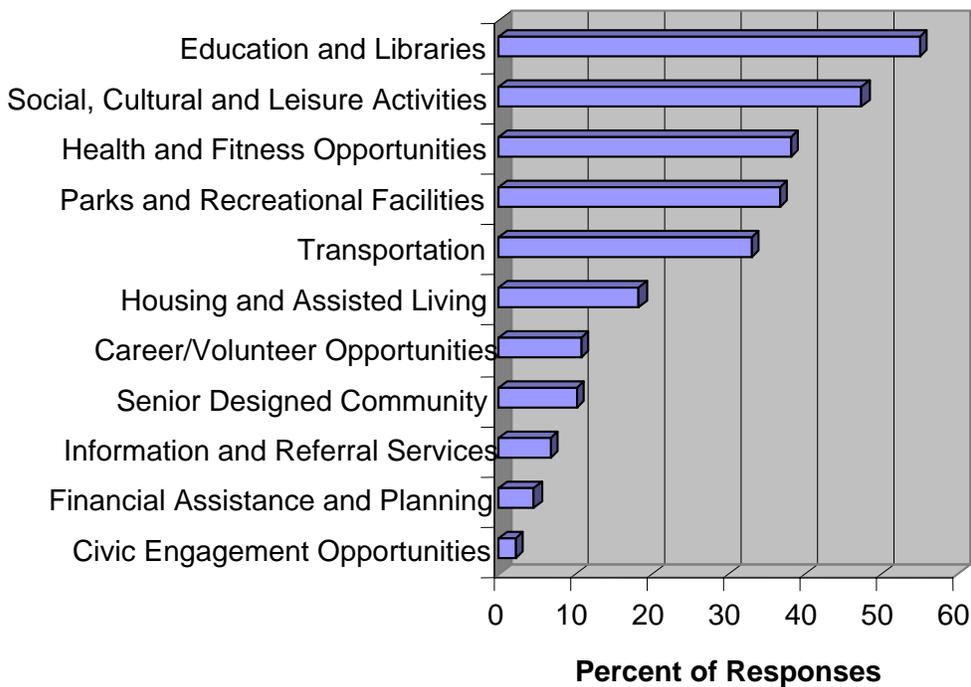
When we asked Boomers to look at their lifestyle needs of today, and begin to project their needs into the near-term future, four themes were clear priorities. Data suggests that Boomers are presently engaged in and will continue to find a priority in leisure activities; health and fitness; park and recreation facilities; and life-long learning and library-based services. This does not come as a surprise, as mentioned earlier, Boomers are individualistic, looking for new experiences and wanting to be fit and healthy enough to experience them.

What New Services Are Needed?



In this question we asked participants to look into the future. The mindset is indeed different than the pronounced themes from the previous question. As opposed to education and socializing being a top priority, when Boomers contemplate the idea of “getting old” they are more interested in better forms of transportation and staying healthy. Many consider the ability to drive as the last vestige of independence and the survey confirms that Boomers want to continue their independence, car or no car. The survey also implies that the need for more health and fitness programs, continued opportunities for socialization and education, and the ability to age in their own homes as priorities for our aging populous.

Of All Services, Which Are the Most Valuable to You, Personally?



Surprisingly, although transportation continues to rank relatively high, the themes that make up lifestyle and education are seen as the most valuable of services. Note that this outcome was expressed different at the community input meeting where transportation was proposed as the highest priority, followed closely by fitness, cultural and educational opportunities. This data does confirm that the provision of a variety of educational, social and lifestyle

programs and services are essential to how Boomer's perceive the concept of "Aging Well."

The survey instrument also asked for written comments for the question, *"When you have more time, what do you want to do with it?"* Hundreds of comments were provided, and the predominant themes, prioritized by the number of times each concept was mentioned, were:

- **Volunteering**
- **Travel**
- **Reading**
- **Fitness (swimming, golf, running, bicycling, etc.)**
- **Education**
- **Spending more time with family**
- **Enjoying the outdoors**
- **Attending and learning about art and cultural activities and presentation**

Additionally, the survey asked for general comments. Although it's impractical to provide all of the comments offered, the following quotes represent some of the individual thoughts provided by our participants:

"Us Boomers will stay active and want places to go dancing, to dinner, theatre, at affordable prices."

"... the cost of housing and living in this city are the most critical variables for seniors AND young folks. If seniors want to be near family but younger generations can't afford to live in the Bay Area – we will have to leave!"

"Transportation for people who can no longer drive their own car would be my top priority."

"Services for seniors in Palo Alto tend to be viewed as assistance for the aged (aged 75+). There doesn't seem to be anything for active, healthy, people in their 60's and early 70's."

"Retired, or partially retired, PA residents could be hired for short term projects. They might be willing to work for lower wages to offer their expertise to the City. Perhaps you should maintain a registry of residents

with expertise who would be available for City or nonprofit projects at reduced rates?"

"I'd like to see a moratorium on new services so that new taxes and fees can be avoided . . .so I can afford to continue living in Palo Alto in retirement."

"Provide exercise and recreational programs at reasonable rates or free of charge."

"Those of us that are at the end of the Baby Boom have paid extremely high prices to afford our homes. . . .We tend to have children later in life We are going to be very strapped for cash and retiring before our kids graduate from college."

"The three most important things to consider: public safety, education and health care."

"I have been retired now for less than a year and have been surprised to see how many current retirees take advantage of travel, cultural and education services. Planning for the huge influx of Baby Boomers who are retiring will be good for Palo Alto and its citizens."

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Inventory of Palo Alto Service Assets

Palo Alto is fortunate to have a wide variety of civic and nonprofit agencies providing programs and services to meet the needs of older adults. These agencies provide a wide range of services from recreational opportunities to social services. The following summarizes the programs and services of each agency and tries to provide some perspective as to the present and future capacities each program in terms of staffing and facility levels.

Avenidas

Services: Avenidas is a full-service older adult center. It offers a wide range of programming including classes in creative arts, personal interest, and health and fitness. Its service range also includes special events, personal health services, counseling and support, case management, adult day health care, transportation services, volunteer care giving outreach, social clubs, handyman service and volunteer placement.

Budget: Avenidas' total budget committed to older adults is \$3.7 million funded in part with \$420,000 from the City.

Capacity: On average Avenidas' staffing capacity⁶ ranges between 75 to 100% depending on the program while its space capacity is similar. In almost all of its program areas, Avenidas is seeing increased participation and is over capacity in case management and transportation services. There is little doubt that the program continues to grow and to meet the demand it will require more facility space in the not-so-distant future.

Albert L. Schultz Jewish Community Center

Services: This center, presently located on the Cubberley Community Center campus, focuses on classes, clubs, health and fitness activities and special events for older adults. The agency also offers information and referral services to its members.

Budget: Total current annual budget dedicated to older adult services is \$80,000.

Capacity: The program does have space capacity for increased participation with programs utilizing 25% to 75% of the available space; however staffing is at 100% capacity for almost all services. Note that in 2009 the JCC will have a new

⁶ Staffing and facility capacity have been evaluated by each agency in terms of their ability to meet the perceived needs of their clients for various services. 100% staffing capacity, for example, means that the agency is currently using all of the staff resources it has available for the service or program. 25% space capacity would mean that the program has the facility capacity to increase programming by 75%.

location in south-east Palo Alto and with it increased capacity for both staffing and program.

City of Palo Alto

Services: The City of Palo Alto offers few programs focused at older adults. It runs a golf course with “senior” reduced fees, a senior softball league, and the Senior New Year’s Eve Day Bash. Of course, the City also offers a very rich scope of activities and services for adults of all ages including thousands of acres of parks and trails, branch and full service libraries, theaters, community and interpretive centers, aquatic facilities and a full range of art and recreational classes and special events. Palo Alto also provides a shuttle service that offers no-cost transportation on specified routes. Palo Alto does grant, through its Human Services Resource Allocation Program, approximately \$500,000 to nonprofit agencies providing older adult services, with Avenidas receiving the largest share.

Budget: Funds committed by the City for senior programming is approximately \$550,000.

Capacity: Use and staffing capacities range between 50% and 100% depending on the program, with library services are running at full capacity in both staffing and facility levels.

Community Association for Rehabilitation (CAR)

Services: Located in South Palo Alto, CAR is one of the few local providers of aquatic therapy for older adults.

Budget: The total budget dedicated to older adults is \$414,000.

Capacity: Space and staffing are not at capacity, but the program continues to grow.

La Comida De California, Inc.

Services: La Comida serves over 130 noon time meals to seniors on a daily basis.

Budget: Total budget is \$235,000.

Capacity: Capacity for space and staffing is maxed out, but the need is increasing.

Palo Alto Adult School

Services: The Adult School offers a mix of classes of adults ranging from creative arts, languages, computer instruction, and health and fitness. It does offer older adults exercise classes in assisted living situations.

Budget: The total budget for older adult programming is \$67,000.

Capacity: The program is at capacity for staffing level, but has a small amount of space capacity within its personal interest classes.

Palo Alto Family YMCA

Services: While not offering personal interest classes, the program does offer health and fitness activities, personal health services, special events, lectures, food and nutrition programs, social clubs and a therapeutic exercise program.

Budget: Both space and staffing capacity is about 50% and participation is increasing in all programs.

Capacity: Total budget dedicated for older adults is \$1.8 million.

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Meeting Future Needs

Defining the Challenge

The conclusions found in this paper are not solutions, but suggestions on how to move forward and perhaps build upon our existing strengths to provide an environment that will meet the concerns and allow all Palo Altans the opportunity to “Age Well”.

The prominent findings of this study are as follows:

Most Boomers want to live independently as they age and the concept of a “senior friendly” environment, especially with regards to mobility, is very important.

Fortunately, some areas of Palo Alto have neighborhoods that are relatively “walk-able”, but to be truly “senior-friendly”, public and private sectors should explore alternative methods for transportation that allow independence without the use of automobiles. Improved, more flexible and more convenient public transit should be developed to give older drivers viable alternatives to their own car – and to reduce the number of cars on the roads.

Some suggested strategies to help prepare for this scenario:

- Actively promote alternative means of transportation including wider City and Stanford University shuttle routes; volunteer drivers; and shared transportation resources.
- Design infrastructure improvements that support safe use of alternative modes of transportation including pedestrian, bicycle, electric carts, and shuttles. Some examples include replacing old street signs with new, larger signs with larger fonts, widening sidewalks, more defined lane dividers, and creating well-marked pedestrian crossings.
- Provide a network of transportation services that meet older adult needs, such as linking the City’s shuttle service to current and future forms of transit.
- Encourage the location of essential services such as grocery stores and pharmacies in neighborhoods, within walking distance.

A desire to be engaged in community and social activities and have a variety of learning opportunities are strong factors in the way our Boomers want to live out their lives.

The need for continuing educational and cultural activities will increase over time. In the next 5-10 years, the greatest demand will be for “lifestyle” activities and services: educational programs; fitness activities; and leisure and travel programs. Many local organizations that offer these programs exist now and have the capacity for some growth. But it will take a concerted community effort to meet the increased demand at affordable cost.

Some suggested strategies to help prepare for this scenario:

- Assemble a task force to assess the need for new and augmented facilities to meet future programming needs.
- Provide information that’s easily found about City and community life-long learning resources.
- Encourage a variety of affordable, culturally appropriate and language diverse learning opportunities.
- Co-mingle public facilities with commercial locations to provide easier access to services and products.
- Facilitate dialogue between all local public and non-profit entities to provide programs for a variety of learning abilities and delivery methods.
- Provide activities and facilities that foster contact with all segments of the population like intergenerational centers or library/community center combinations.

Palo Alto Boomers want to stay involved either through volunteerism or continued part or full-time employment.

Boomers, either to stay socially connected and engaged or to augment retirement funds, have clearly articulated the desire for volunteer and employment opportunities. Some have implied that a new career is not out of the question, and the idea of mixing work, leisure and education has been a prominent theme emerging from our discussions and survey data. The importance of this resource cannot be taken lightly. With change comes opportunity, and it will be important to find ways to expand the contributions of older adults in later life.

This human resource is untapped and, if used correctly, it can be a force for social good.

Some suggested strategies to help prepare for this scenario:

- Promote, through new policies and education, the elimination of age discrimination in the workplace.
- Actively encourage older adult involvement in elected and appointed office and in policy development and advocacy. For example, use someone like former Mayor Jim Burch as an excellent role model for community involvement during ones' latter years.
- Create a job database and listing of employment and employment training opportunities for older adults in city and community publications.
- Develop employment policies designed to retain and recruit older adults. These policies should recognize the flexibility and independence Boomers are seeking in their lives.
- Provide incentives to businesses and organizations who promote policies to hire and retain older workers and volunteers.

Most Palo Alto Boomers want to remain in Palo Alto for the remaining years of their lives.

Boomers will live longer and remain in their homes longer, and as they approach the "old-old" stage of life, the demand in programs will shift to supportive services including in-home care, practical help, transportation alternatives, and assisted living.

Some suggested strategies to help prepare for this scenario:

- Review of the Comprehensive Plan to identify possible solutions to close the gap in housing supply and demand, including the type of housing required, affordability of ownership and rentals, and locations that could provide easily accessible services (within walking distance).
- Provide funding mechanisms for affordable home renovation and repair programs for low income senior households.
- Continue to provide training and technical assistance to City building inspectors on accessibility requirements.

- Encourage the development of universal, accessible, user-friendly housing.

Palo Alto Boomers want to remain physically and mentally active well into their elder years.

The concept of being socially and physically active and involved in one's community can only work if the individual is healthy and fit enough to participate. Medical costs continue to escalate, and it can only benefit our community if older adults are proactive about their fitness and mental wellbeing.

Some suggested strategies to help prepare for this scenario:

- Provide expanded opportunities and facilities for recreation related activities for all levels of fitness, age and disabilities.
- Increase the distribution points for fresh produce and wholesome food products.
- Increase the capacity to support hunger and nutritional programs for older adults.

Meeting the Challenge

The challenge before us is three-fold:

- How do we develop a plan that readies our community to support the dramatic shift the number of older people, especially as Baby Boomers enter into the latter phases of life?
- Can new resources be found or existing resources be redistributed to better handle the anticipated impacts?
- How do we, as a community, make the best use of the intellectual and labor resource that will come with the aging of Palo Alto?

It is this Task Force's recommendation that our community undertake the development of a strategic plan for aging in Palo Alto. The plan should focus on achievable and meaningful near and long-term strategies to ease the impacts of the population shift as well as discover ways to use the opportunities that come with it.

Although City of Palo Alto staff, in partnership with the Task Force of service providers, initiated this study, it will take a concerted effort from elected and appointed officials, service providers, community leaders, the business community and older adults themselves to find the solutions that work for the entire community. Addressing these challenges will require leadership and vision and it is the hope of the Task Force that this brief analysis will prompt our community towards building its strengths thus providing an environment that will allow all Palo Altans to “Age Well”.

* * * * *

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The Task Force

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