

25th **VIRTUAL**
Elder
Law
Forum
Annual

(FREE FOR ALL TO ATTEND!)



May 21, 2020
Starting soon:
“Housing Challenges and
Opportunities”

Housekeeping

- ›Your mics are muted.
- ›Handouts can be downloaded from your control panel
- ›Or visit **www.pierrolaw.com/resources** to view all of today's PowerPoint presentations and related materials
- ›Ask questions through the “Q&A” space
- ›All: complete feedback survey emailed at conclusion
- ›Social Workers: Fill out evaluations emailed after each webinar. **Include your license number.**
- ›Tweet about this event: #ELF2020

Thank You to our Sponsors:



VIRTUAL
25th Annual Elder Law Forum

(FREE FOR ALL TO ATTEND!)

Welcome!

PART 2 – May 29 – 8:30-10:30am

Live Interview with Lawmakers

Moderator Benita Zahn

Rachel May, Chair, Senate Aging Committee

Harry Bronson, Chair, Assembly Aging Committee

Steve Stern, Assembly Aging Committee

John McDonald III, Assembly Insurance Committee

New York State Update

Moderator Lou Pierro

Greg Olson, Director, NYS Office for the Aging

Becky Preve, Exec. Dir., NYS Association on Aging

Mark Kissinger, Special Advisor to the Commissioner of Health on Aging and Long Term Care (invited)

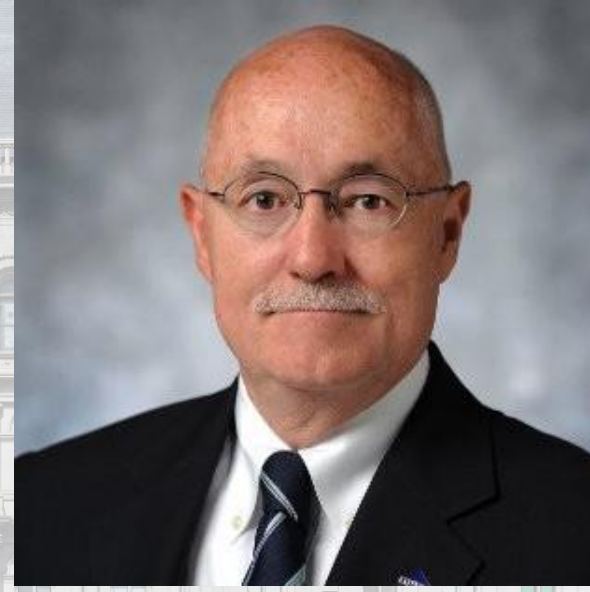
HOUSING CHALLENGES and OPPORTUNITIES



Lou Pierro
Pierro, Connor &
Strauss, LLC,
Moderator



Dan Heim
LeadingAge New
York



Duncan Barrett
Beacon
Communities
Development, LLC



Ken Harris
Albany Guardian
Society



**Virtual Elder Law
Forum**

May 21, 2020

Dan Heim
Executive Vice President

***Housing Challenges and
Opportunities for Seniors
and Persons with Special
Needs***

***Skilled Nursing, Assisted Living
and Retirement Housing***

Introduction and level setting

Measures being taken to prevent spread of Coronavirus

Challenges to keeping residents and staff protected

Keeping residents and families engaged

Preventing a resurgence of Coronavirus as the economy reopens

Presentation Outline

Introduction and Level Setting

- Characteristics and needs of residents of:
 - Nursing homes
 - Adult Care Facilities (ACFs) and Assisted Living (AL) facilities
 - Retirement housing
- Risk factors for COVID-19
 - Age
 - Chronic conditions including lung disease, diabetes, heart disease and hypertension
 - Prevalence of these risk factors in nursing homes and ACF/AL

Measures being taken to prevent spread of Coronavirus

- Nursing homes and ACF/AL are working to prevent spread and care for affected residents:
 - Restricting visitation
 - Requiring PPE use
 - Enhanced cleaning
 - Staff screening
 - Restricting group activities
 - Cohorting residents and staff
 - Resident and employee testing
- Retirement housing facilities are not regulated as health care, but are taking several steps:
 - Suspended group activities
 - Closed restaurants and salons
 - Staff and contractor screening
 - Discouraging visitation
 - Enhanced cleaning
 - Virtual tours and quarantine after move-in
 - Social distancing and face coverings

Challenges to keeping residents and staff protected

- Access to adequate PPE:
 - Much bigger than LTC
 - Shortages due to increased demand, supply chain and distribution
 - “Burn rate” can suddenly change leading to shortages
 - Nursing homes and ACF/AL weren’t prioritized
 - Somewhat improved, but not out of the woods yet
- Access to enough testing:
 - CDC recommends baseline and periodic testing of staff and residents
 - Like PPE, demand has outstripped supply of testing materials and lab capacity
 - Adding to pressure, NY State recently ordered that all nursing home and ACF/AL residents be tested twice a week
 - Strain testing capacity, hardship on staff, financial burden
- Financial impact on providers:
 - Increased costs
 - Reduced census

Keeping residents and families engaged

- Family notification requirements for nursing homes and ACFs
- Face-to-face video calls
- Family call programs with social work staff
- Weekly town halls with leadership
- Daily updates on website/phone system
- Phone conferences with clinical staff
- Bereavement support groups
- Written communications by mail
- Through-window calls or visits
- Pen pal programs and greeting cards
- Car parades

Preventing a resurgence of Coronavirus as the economy reopens

- Nursing homes and ACF/AL
 - No indications from NYS on relaxing visitor restrictions or group activities
 - CMS reportedly considering phased plan to gradually lift restrictions
 - CDC reopening guidance
 - State/federal focus on infection control
 - Testing and PPE supplies
- Retirement housing
 - Not regulated as health care but subject to New York on Pause
 - Reopening of salon and restaurant services in Phase 2 and 3, respectively
 - CDC reopening guidance
 - Have begun planning for future lifting of visitor limitations and group activities
 - Learning from other states that are reopening quicker



Thank You!

Dan Heim

Executive Vice President

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Intergen

An intentional intergenerational
community



Affordable Housing in NYS

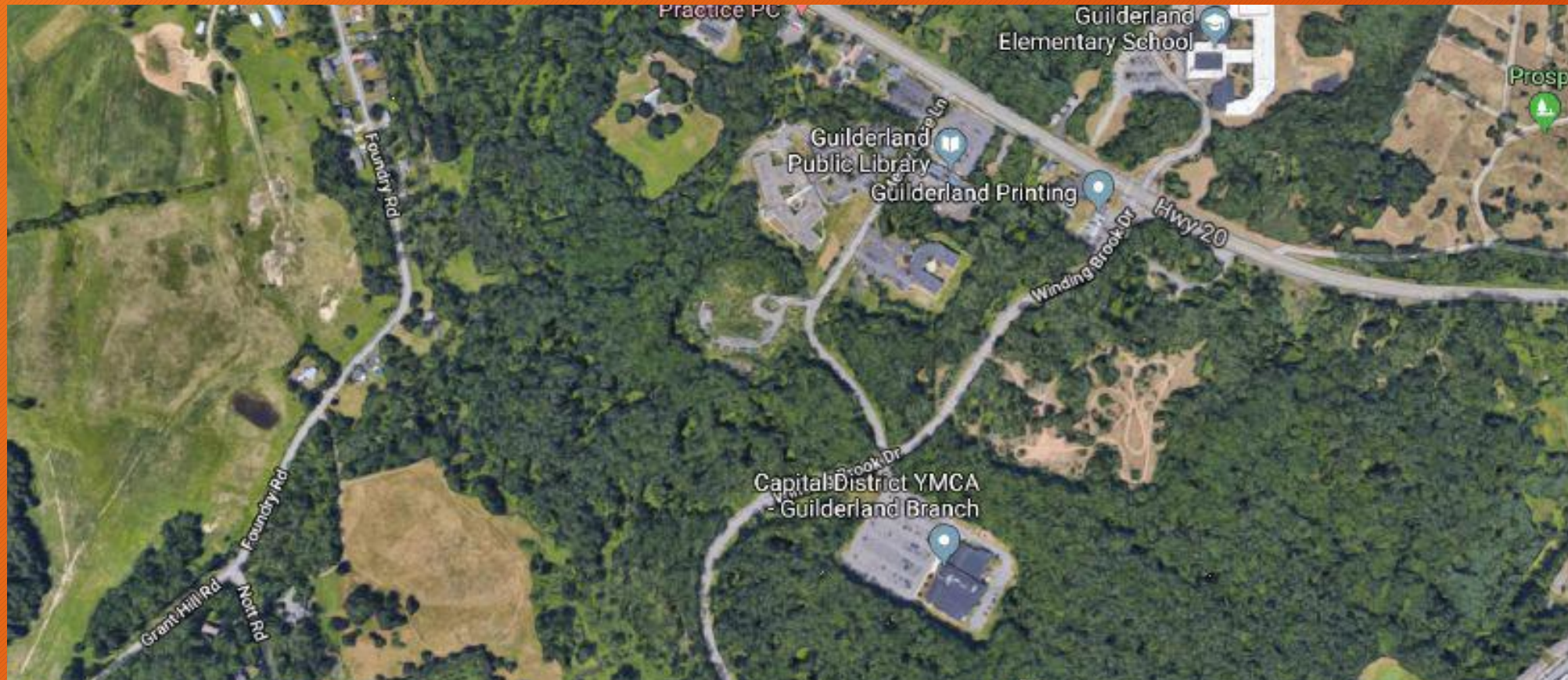
There is a Crisis in NYS resulting from the lack of Affordable Housing

- Rents are increasing faster than incomes
- 1.5 Million NY households pay more than 50% of their income for housing
- Delapidated substandard housing abounds in our large cities, small cities, towns and rural areas
- Public Housing—historically the housing of last resort for the poorest of our citizens is failing.

NYS Is a Leader in Funding Affordable Housing::

- Over \$53 MM in Federal LIHC -generating over \$450MM in capital
- Over \$200 MM in soft debt
- Multi-year commitment to fund

Location:



What is planned: community mix

Rental Housing

- 65 homes-
 - 52 for older adult households
 - 5 for families adopting foster children
 - 8 for adults with I/DD
- A clubhouse that includes
 - Management offices
 - Offices and meeting space for supportive service providers
 - Gathering space for community meals





Proposed family and
cottage units

Why an intergenerational community



- Treehouse as a model:

OUTCOMES FOR CHILDREN AT TREEHOUSE (10 years)

	<u>National Average</u>	<u>Treehouse</u>
• HS Grads	58%	95%
• Arrests	46%	0%
• Teen Parenting	48%	2%
• Failed Placements	16%	0%
• Attend College or Vocational Sch.	10%	100%

Treehouse: Photos





Community Characteristics:

- Intentional
 - Self selecting aspect
- **Permanency Model for the Children**
- Supportive
 - Older adults to provide support and caring “foster grandparents”
 - Community to engage older adults to prevent isolation and promote health
- Income Mix:
 - Some affordable
 - Some Market Rate

Aspirations:

- Community formation—
 - Support and engage the older adults in meaningful life experience
 - Support the foster children and former foster children and their families
 - Support and engage the IDD adults
 - Purposeful, mutually beneficial activities
- Model for future such communities in NYS



“

Thanks to:

-the Treehouse Foundation

every child rooted in permanent loving family and community

-Leading Age & Generations United

”



Photos/inspiration/core concepts

The Partners:

- The **NYS Office of Children and Family Services** formed a task force to study the potential for importing the Treehouse inspired model to NYS.
- Out of that taskforce grew a partnership for the development and operation of the Guilderland project that includes:
 - Northern Rivers Family of Services
 - Center for Disability Services
 - Beacon Communities
 - With continued support from—
 - NYS Office of Children and Family Services
 - NYS Office for People With Developmental Disabilities
 - NYS Office for the Aging

Beacon Communities

Beacon Communities LLC is a Boston-based developer, owner, and manager of affordable and market rental housing. Our team of highly experienced residential real estate professionals are involved in over 18,000 apartments across 150 communities throughout thirteen states. We have a proud forty-plus year history of building and managing award-winning residential communities that serve a diverse cross-section of society and make enduring contributions to the cities and towns in which they are located.

Housing Challenges and Opportunities for Seniors and Persons with Special Needs

The Village Movement Senior Cohousing & Intentional Communities Shared Housing



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Ken Harris
Albany Guardian Society



Coronavirus Pandemic

Coronavirus Pandemic: Life Changed Fast

- “NYS on Pause”: March 22
- “Matilda’s Law”: 70+ Stay at Home Orders
- Agencies lost volunteers (Meals on Wheels, transportation...)
- Essential services: groceries, medications, doctors appointments...
- Isolation and fear of the unknown.



Neighbors Helping Neighbors

“Neighbors Helping Neighbors”

If you were able,
would you help your
neighbor, if they
needed help?



“Villages”

Neighbors Helping Neighbors

“Neighbors Helping Neighbors”: The Village Movement

- Geographically defined.
- Grassroots: Volunteer based
- Coordinates Programs & Activities:
Prevents Isolation
- Assists with Transportation
- Assists with Household Chores
- Provides Connection to the Neighborhood
and Community



Villages: Guiding Principles

- **Self-governing, self-supporting, grassroots membership-based organizations.**
- **Consolidate and coordinate** services for members.
- Creates **strategic partnerships with existing agencies** that leverage community resources and do not duplicate existing services.
- Promote **volunteerism and community** engagement.



Each Village is Unique

“If you have seen one Village...you have seen one Village.”

- All Volunteer or Staff?
- Volunteer Recruitment?
- Social Focused?
- Services Delivered?
- Dues?
- Partners?



Village Business Models

Grassroots / Not-for-Profit Village

- Started by neighbors wanting to age-in-place
- Small staffs or all volunteers
- Incorporated as a 501c3 with Board of Directors

Agency Sponsored Village

- Affiliated with existing social service agency
- Agency, not Village, Incorporated

Hub & Spoke Village

- Villages that collectively share back office, administration costs through economies of scale

“Hybrid” Village Model

- Combination of above models.



Governance

“Grassroots” Village Organizations:

501(c)3 Organizations

- Collect dues for membership
- Partnerships & grants
- Tax benefits
- Product discounts (Google phone, Tech Soup...)

Board of Directors

- Officers for decision making
- Budget & governance



Volunteers

Volunteer Based Neighbors Helping Neighbors

- Villages screen volunteers (background checks, driving record...)
- Nationally 53% of Village members volunteer for their Village
- Volunteers include Village members, retirees, business owners, college students, faith communities, parents....



Village Budget

Potential Village Start-up Expenses:

- Incorporation as a 501(c)3
- Insurance
- Event costs (refreshments...)
- Website development
- Marketing materials (Brochures...)
- Service coordination software
- Computers, phone...
- Staff, office....



Village Dues

Membership Based

Village Budgets:

- \$2,945 to \$862,423
- Staff or all volunteer?
- Average Budget: \$134,567
- 53% of Village budgets are under \$100K



Dues:

- Annual dues: \$20 to \$975
- Dues reflect the volunteers / staff / services / partnership balance

Village Programs

Social and Educational Programs:

- Book clubs
- Hiking, walks & biking
- Concerts & plays
- Exercise classes & yoga
- Wellness classes
- Educational classes
- Trips
- Lunches, dinners, parties
- Special interest groups



Village Services

Village Services

Unique to each Village based upon member needs:

- Home repair
- Transportation
- Shopping
- Medical appointments
- Caregiver support & respite
- Friendly visitors
- Computer services



Village Services

Village Services, Continued

Unique to each Village based upon member needs:

- Pet care
- Financial advice
- Yard/plant care
- Meal preparation
- Professional assistance



Program Partnerships

Community Partners

Social Activities:

- Museums
- Libraries
- Senior housing / CCRCs
- Colleges
- YMCA, health clubs
- Community Caregivers, Care Links...
- New York State Office for the Aging



Coordinating Services

Coordinating Services for Members

- Vetted services lists.
- Paid business services are often at discounted rates.
- Matches member request to volunteer service.
- Variety of ways to coordinate service including software and technologies.



Capital Region Villages Collaborative

Capital Region Villages Collaborative

- Website Featuring:
 - Village Information
 - Local Villages
 - Village News & Resources
 - Villages Calendar
 - Listserv (In development)
 - Village to Village Network



www.CRVillages.org



Capital Region Villages Collaborative

In Operation:

- Shenendehowa Neighbors Connecting
- Neighbors of Northern Columbia County
- Bethlehem Neighbors
- Niskayuna Neighbors
- Aging in Place Glens Falls
- Rhinebeck at Home

In Development / Discussions:

- City of Albany Village
- Guilderland Neighbors
- City of Troy Village



Villages Technical Assistance Center (VTAC)

Collaboration Between:

- ◆ New York State Office for the Aging (NYSOFA)
- ◆ Albany Guardian Society (AGS)



- Two-year project;
- Provide direct information and assistance to develop Villages;
- Capital Region – expand in future;
- Work with regional and national Villages;
- Partner with Village to Village Network;



Villages Technical Assistance Center

Villages Technical Assistance Center (VTAC) - Assistance With:

- how to file as a business in NYS;
- how to incorporate as a 501(c)3;
- the difference between a staffed and all-volunteer Village;
- the organizational and governance structure of a Village;
- what area to serve;
- how to develop a Village business plan;
- developing a Village initial and ongoing budget;
- what type of insurance is required;
- how to determine the services offered to members;



Villages Technical Assistance Center

Villages Technical Assistance Center (VTAC) Assistance with:

- what funding sources are available and how to apply;
- resources available to not-for-profits and Villages;
- what Village software can assist in organizing services;
- how to recruit, train, and retain volunteers;
- how to vet businesses for members; ...



Learn more...

www.CRVillages.org

Cohousing & Senior Cohousing

- Cohousing: an intentional community of private homes clustered around shared space.
- Originated in Denmark in late 1960s.
- Campus is architecturally designed to encourage community interactions.
- Each attached or single-family home has traditional amenities, including a private kitchen.



Cohousing & Senior Cohousing

- Shared spaces typically feature a common house, which may include a large kitchen and dining area, laundry, and recreational spaces.
- The legal structure is typically a homeowner association or housing cooperative.
- Intentionally limited to around 20-40 homes.
- Shared outdoor space: parking, walkways, open space, and gardens.



Cohousing & Senior Cohousing

Developing a Cohousing Community

Advantages

- Fosters internal community.
- Neighbors helping neighbors.
- Shared mission and values.

Challenges

- Purchasing land.
- Cost of community room and spaces.
- Consensus decision making.



Cohousing Resources

Cohousing Resources:

- **The Senior Cohousing Handbook**

Charles Durrett, 2009

- **The Best of Both Worlds: The Cohousing Promise**

Film: 2019

- **EcoVillage Ithaca: Pioneering a Sustainable Culture**

Liz Walker, 2005

- **Cohousing Website** (National Directory)

<https://www.cohousing.org>

Shared Housing

Shared Housing for Seniors

- Think Modern “Golden Girls...”
- Various arrangements:
 - Seniors & Seniors
 - Senior & Caregiver
 - Senior & Student...
- **Best Practice:** Homeowner develop lease and Home Share contract.



Shared Housing

Shared Housing Advantages:

- **Saving Money**
 - Rent, mortgage, house expenses
 - Groceries, appliances...
- **Companionship**
- **Security**
- **Help in Emergencies**



Shared Housing Resources

- **Senior HomeShares Website:**

<https://www.seniorhomeshares.com>

- **The New York Foundation for Senior Citizens**

<https://www.nyfsc.org/home-sharing/>

- **Home Share Vermont:**

<https://www.homesharevermont.org>

- **“My House – Our House”**

Publication: 2013

Senior Living in the Future...

Remaining Home in the Future...

- Self driving cars
- Assistive robots
- Virtual reality glasses
- “Wearables”
- Meal & grocery delivery
- Care coordination apps
- Medication technology
- Alexa...(Echo), Google Home
- Smart Homes



Senior Living in the Future...



Albany Guardian Society



Albany Guardian Society &

Capital Region Villages Collaborative (CRVC)

Villages Technical Assistance Center (VTAC)

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Questions for our Panel?

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Coffee Break and Stretch!



Our program resumes in 5 minutes

COMING UP....

“Home Care Challenges”