

1) PERSPECTIVES IN CALIFORNIA: EXAMINING THE STATE AND FEDERAL POLICY CLIMATE AND THE LTSS IMPACT

- Coordinated Care Initiative:
 - IHSS Advocacy
 - Universal Assessment Advocacy
 - Request for the CA Budget and Policy Center Fact Sheet (included as an attachment)

- Whole Person Care Pilots
 - Issue with the definition of Community-Based Services really meaning FQHC
 - In-roads with Counties, who are approaching the program in a very insular way. Invite Public Health, Health Plans, and other key stakeholders and ask for what CBO definition is being used to expose/explore this challenge in a public space.
 - See [Harbage Fact Sheet](#) (included as an attachment)

- Regulations
 - What can Coalitions do to engage with regulatory bodies before the regulations are set? How can Coalitions be a part of the development process? Could this be a focus on a monthly webinar topic?
 - Once regulations are set, how can Coalitions help prepare the community?
 - Person-Centered Planning is a major focus area – how do Coalitions ensure that this is more than just a check-box, but a philosophical transition? A focus on these regulations could also be a monthly webinar topic. Could person-centered planning be a presentation or training included in the July regional meeting?
 - Enforcement – how to Coalitions play a role at ensuring changes required by the regulations are actually happening?

2) SMALL GROUP INFORMATION SHARING: REPORT-OUT FROM THE A,B,C ACTIVITY (*Sharing successes, challenges, and practicing elevator speech*)

Regional Coalition	Notes from Discussion
Stanislaus	Shared our challenge of sustainability and received feedback on how to engage hospital foundations, community-benefit funds, Board of Supervisors, and City Councils.
Alameda	Shared a major set-back experienced this week when the Board of Supervisors shot-down an Aging Initiative. We got lots of support from the other Coalitions and a reminder that we are “so close.” We were given a different lens to look at the situation, to help tease out who we need to talk to and different positive and negative approaches/tools we could use.
Santa Clara	Learned that some Coalitions are doing a lot with less money. Can we operationalize our Coalition efforts on a smaller budget too?
Bay Area	Received help with our elevator speech – keep is positive and to highlight our impact on the community.
Contra Costa	Shared our structural challenge being an Advisory Council on Aging. Plan to invite other Coalitions to provide testimony to the Council members and be strategic about recruitment pipeline.
San Mateo	Learned where our Coalition’s interests overlap with others and plan to follow-up. The Monterey Bay Coalition is focused on housing challenges. The Yolo Coalition has an annual meeting where each Coalition member describes their services, ensuring we really understand each other and can effectively direct people to services they need. We also got feedback on how to “get the ear of elected officials” and to work on our elevator speech to ensure it is more succinct.
San Francisco	All coalitions appear to be having a challenge on how to have a meaningful voice – not the right time, not a good connection to the County/Govt, and/or are missing people in the room. We learned about the challenges of having a large geographic area (makes us thankful), but also shared our challenge of competing advocacy efforts. We learned that we have to “be current” to keep people engaged in our issues.

Monterey Bay	Learned about the use of a survey monkey tool and membership questionnaire. One set of questions will be sent to members who attend regularly to keep them attending. Another set of questions will be shared with members who are not attending to see what we can do to bring them back in.
Nevada/Sutter/Yuba	Shared our struggle with advancing the ADRC concept, especially engaging the County. We also shared a success about engaging behavioral health and clinics around the ADRC concept.
DAN	Shared our geographical struggle, especially the insularity of the counties. But, instead of walking away thinking the lack of progress was the fault of the Coalition, we learned that the system is not set-up for a broader network. We are going to re-think our approach and investments for each county to focus on those where our message is connecting to ongoing efforts (e.g., emergency preparedness in Glenn County).
Yolo	Learned about the Santa Clara Bond Measure - \$950 Million for housing! They broke this down to \$12.50/year for each home-owner. They talked to two Supervisors and got their buy-in first. We are going to Senior Rally Day too!
Lake & Mendocino	Received great advice on how to connect to Advisory Councils on Aging.
Placer	Working on AB1200 to include the ADRC model in state statute. We shared political challenges of a conservative county. We got advice on how to approach and think about our elevator speech.

3) ADVOCACY OVERVIEW

Advocacy work is part of what we all do--the major message is--deconstruct the components to make sure it is adding a cumulative value to your overall effort. It is far more likely you will be ineffective if you have not thought through a concrete method of collecting, storing and using basic info as you go. We will share the basic of who's who on committees in the state and federal governmental policymaking and budgeting processes. This info changes and needs updating after every election. Update info along the way and ADD more detail as you learn more. Create workable resource materials like a master

advocacy calendar, roster, phone numbers, email addresses, etc. so you can QUICKLY respond to requests for help which come often and are usually tied to a decision point date.

- Tips for organizing and conducting a successful meeting with a decision maker:
 - Organize team approach:
 - Identify most important/influential supporters locally, add your advocacy "team."
 - Include consumer/s
 - Agree on a leader and a "game plan" 15-20 minutes--leader intro, quick introductions of attendees, allow the consumer to speak, always bring a "leave behind" set of materials (could be one page if appropriate) and copies for the primary decision maker, staff, copies for attendees to take notes.
 - Bring business cards for all; pick up business cards from who you meet.

 - Follow-up:
 - Follow-up with a thank you email/note.
 - Keep people up to date via emails by adding relevant people to newsletter, event invite lists, etc.
 - Stay in touch and return at least once a year.

- Create an Advocacy Rolodex and consciously build it--ALWAYS grow your list, add people you meet who have a special connection to our populations. Find ways to collect and save info that fits how you work.
- ALWAYS do a post-event candid evaluation in any advocacy work with your team: What worked and why; what could have been done better/ does anything need to change with the meeting protocol that needs to be done next time. Write it down and store the protocol for quick reference next time.
- See this work as Essential to your operations. Make time each week to ADVOCATE--letter writing, phones calls, meetings, keep a calendar and add opportunities for advocacy to it, social media a few times a week. LEARN how to TWEET! And RETWEET!

4) RANKING ADVOCACY LEVEL & PRIORITIES BETWEEN April and July 2017

4a) URBAN COALITIONS

Regional Coalition	Self-Rank on Advocacy Level	Priority Advocacy Focus/ Notes
Stanislaus	Weak-Moderate	Elevate awareness on the Assisted Living Waiver and that our county needs this waiver
Alameda	Strong	#1 Championing reliable \$ for LTSS – specifically HCBS #2 Advance local WPC and HH to better address older adult needs and the need for HCBS to be included in the design of the program and contracts #3 Advance local solutions with anti-displacement approach as part of a County Housing Bond
Santa Clara	Moderate Plus	#1 Advance integration in the Housing Bond, specifically: the RFP to include on-site services; universal design concepts in 100% of unites to support aging-in-place; and transitional housing. #2 Advance local WPC and HH to better address older adult needs and the need for HCBS to be included in the design of the program and contracts
Bay Area	Moderate	#1 Incorporate advocacy into the 2017 Forum – ensure the event is action-oriented #2 Age-Friendly WHO Designation for the region – connect to efforts in Santa Clara, Alameda, and SF
Contra Costa	Strong	#1 Build Coalition #s #2/3 Senior Rally Day (May 11th) with a sustainability message (training and Leg Visits 101) #4 WPC to better address older adult needs and the need for HCBS to be included in the design of the program and contracts
San Mateo	Moderate ability to engage (However	#1 Elevate that programs are in danger #2 Mental Health Services Act

	cannot advocate as a county-based Coaliton)	
San Francisco	Strong	#1 Budget Asks - Housing Subsidy, IHSS Retention Pilot (workforce crisis), and Expansion/need for geriatric providers in AIDS/HIV Clinics #2 Continue work on our Action Plan, connected to the LTCI Strategic Plan

Urban Regional Coalition Follow-up Activities:

- May 11th – Attend Senior Rally Day and/or schedule in-district visits to elevate the event
 - Debbie Toth to share share information via the Google Group
- Send Letter to Senator Kevin De Leon re: Making Permanent the Committee on Aging and Long-Term Care
 - Debbie Toth (Contra Costa) will draft a letter template and share via Google Group
- June 11th Attend the Independent Living Conference (in Sacramento)
 - Forest Harlan to share information via the Google Group
- June 13th – Attend Disability Action Day and/or schedule in-district visits to elevate the event
 - Sheri Burns to share information via the Google Group
- Santa Clara – Contra Costa – Bay Area: Coordinate Engagement with Assembly member Ash Kalra
- Elevate IHSS Challenges and/or Join a Task Force
 - Mark Burns will share information on the SF Task Force
 - Rural Coalitions also focused here – see notes below for action items

4b) RURAL/SUBURBAN COALITIONS

Regional Coalition	Self-Rank on Advocacy Level	Priority Advocacy AND Action Steps between April and July 2017
Monterey Bay	Moderate	<p>IHSS funding structure:</p> <p>Local Level-Get the budget impact #s for each county and find out how each county plans to fund the additional IHSS costs (i.e., what county programs will be at risk for losing funding), Connect with county lobbyists and see if there are ways to partner with the counties in advocacy.</p> <p>State Level- Develop twitter messages, such as #RestoreIHSSfunding formula or #savethecounties. Find out what budget committee members previously served on the Board of Supervisors in their counties, as they may be sensitive to the counties’ needs (i.e., Senator Jim Nielson).Write a collective letter opposing the changes to the IHSS funding formula, and requesting the MOE to be restored.</p> <p>Housing: In the rural counties, there isn’t enough affordable housing stock available. This creates barriers to transitioning people out of nursing homes, finding accessible housing, and can lead to homelessness. The coalitions shared ideas on how to create more affordable, accessible housing options in their counties.</p> <p>-In Nevada, it takes about 2 years for someone on the section 8 waiting list to get a voucher. They’ve talked with nursing homes</p>
DAN	Moderate	
Nevada/Sutter/Yuba	Moderate	
Yolo	Strong	
Lake and Mendocino Counties	Weak	
Placer	Moderate	

		<p>to help fund rent subsidies for people transitioning out of nursing homes. The ideas are being floated around.</p> <p>-Placer County worked with their Commission on Aging to push the county to develop a 5 year plan to address the needs of the older adults in their counties. They recommended coalitions try working through their respective Commissions on Aging.</p> <p>-They briefly discussed the concept of shared housing as an option, and the implications it has on IHSS hours.</p> <p>-New housing stock is a need, but takes time and money. Developers aren't motivated to do affordable housing.</p> <p>-Providing home modifications helps to keep some older adults aging in place and is away to work with the current housing stock.</p> <p>-The coalitions would like to hear from Megan Rose, Leading Age, and Sheri Bond (worked to get the Santa Clara bond issue passed) to learn from them, possibly at the July meeting.</p> <p>Transportation</p>
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CLOSING THOUGHTS

- The number of threats to LTSS services is a daily accumulation--this is not one battle, it is several on-going local, state AND federal battles all the time for the foreseeable future. Do not expect this to change soon.
- We will meet in July and again in October, and be thinking about what advocacy we can do between now than then. We will be building information and accumulating resources. In the meantime, we will

reconvene in July to see what advocacy we have done over the next few months and we will critique how to do more and do it better.

- Identify Your Coalition's Elected Officials, Committee representation, Key Staff working on LTSS, Board of Supervisors Focused on Health and Human services. Do all of these people know your Coalition? If not, set-up an appointment!