

PA AAA NETWORK PROFILE | December 10, 2020

Note: This report has been edited for public viewing. Some sensitive and proprietary content has been removed.

OPENING

This Pennsylvania's AAA network profile is the culmination of primary research conducted with key informants and stakeholders within and peripheral to the network, including over 90% of constituent AAAs. The purpose of this profile is three-fold:

1. To collect information and perspectives on the experiences and activities of constituent AAAs, including views on the network's future
2. To encourage processes to continuously capture AAA perspectives and desires relating to the network's strategic priorities
3. To synthesize ideas from AAAs for how the network can narrow the gap between its current and desired future state

This profile contains three sections based on survey data, experiences, and perspectives of AAAs and key informants. The first section presents the network's current state, consisting of its characteristics and greatest strengths. The second section articulates how a thriving AAA network is envisioned by AAAs and external stakeholders in Pennsylvania. The third section presents ways in which the network can narrow the gap between its current and future state.

CURRENT STATE	STRATEGIC FOCUS AREAS FOR THE NETWORK	FUTURE STATE
<p><i>How AAAs describe their network today</i></p> <p>Greatest Strengths</p> <ul style="list-style-type: none"> • Shared purpose & community ties • Devoted, expert staff • Intra-network collaboration 	<p><i>How AAAs want to advance their network</i></p> <ul style="list-style-type: none"> • Strengthen Older Adult Advocacy • Strengthen AAA Advocacy • Enhance Relationships & Partnerships • Improve Quality & Consistency • Expand AAA & Network Capacities 	<p><i>How AAAs define a thriving future network</i></p> <ul style="list-style-type: none"> • Coordinated & Integrated • Performance-Based • Growth-Oriented • Responsive & Innovative • Proactive to Change

Research Process

Between June and October 2020, Collaborative Consulting gathered data on Pennsylvania's AAA network's characteristics, activities, external environment, and dynamics to inform how the AAA network can best meet older Pennsylvanians' current and future needs. This research included ten external key interviews with leaders from non-profit service and advocacy organizations as well as state government agencies, and fifteen internal interviews with leaders from Pennsylvania's AAAs representing a range of

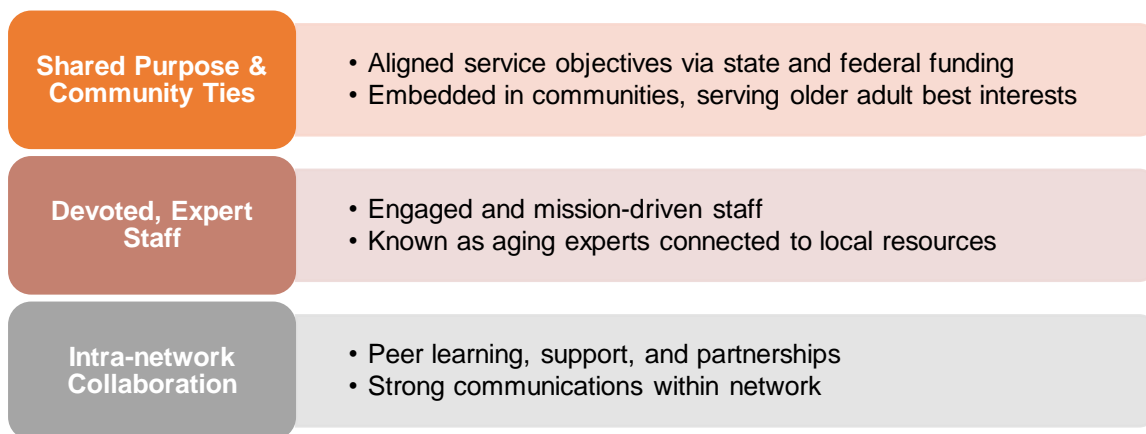
organizing structures, sizes, and geographic locations. An external assessment of the societal, policy, and market drivers influencing current and future AAA threats and opportunities was also conducted. A final research component involved analyzing findings from a survey distributed to all AAAs in the state, completed by 48 out of the 52 AAAs (92% response rate).

GOVERNMENT vs. NONPROFIT AAAs

Some areas of the profile compare AAA responses across government- and nonprofit-based AAAs.

1. CURRENT STATE OF THE NETWORK

The current state of the network can be summarized into three overarching strength areas:



Strengths of the Network

The network has many core strengths that benefit AAAs and the people and communities they serve. AAAs are well-connected to each other and to their communities, they are strong advocates for older adults, knowledgeable about lived experiences, and are passionate about service. The network is a formal and informal platform that can enhance and deploy strengths and capacity-building assets across all AAAs.

Shared Purpose and Deep Ties to Communities

The area of greatest common ground among AAAs is their universal commitment to the mission of improving the lives of older adults in communities across the Commonwealth. This common mission is driven by serving in the best interests of older adults, a factor unique to the network and setting it apart from other groups in Pennsylvania. The core of every AAA involves the state and federal funding mandates which programmatically and philosophically align agencies at the mission and operational level. All AAAs maintain deep connections to and knowledge of the communities they serve, allowing for localized and tailored service and advocacy responses to older resident needs. This combination of programmatic alignment and localized services is a unique virtue of the network.

Devoted, Expert Staff

AAAs pride themselves and are recognized by others as having staff that are uniquely committed to serving older adults, resulting in a reputation for high customer service, a willingness to work together to improve client outcomes, and as strong advocates for the health and wellbeing of older adults. The word cloud generated by AAAs, describes the network as one driven by people who care deeply about the mission and impact of their work:

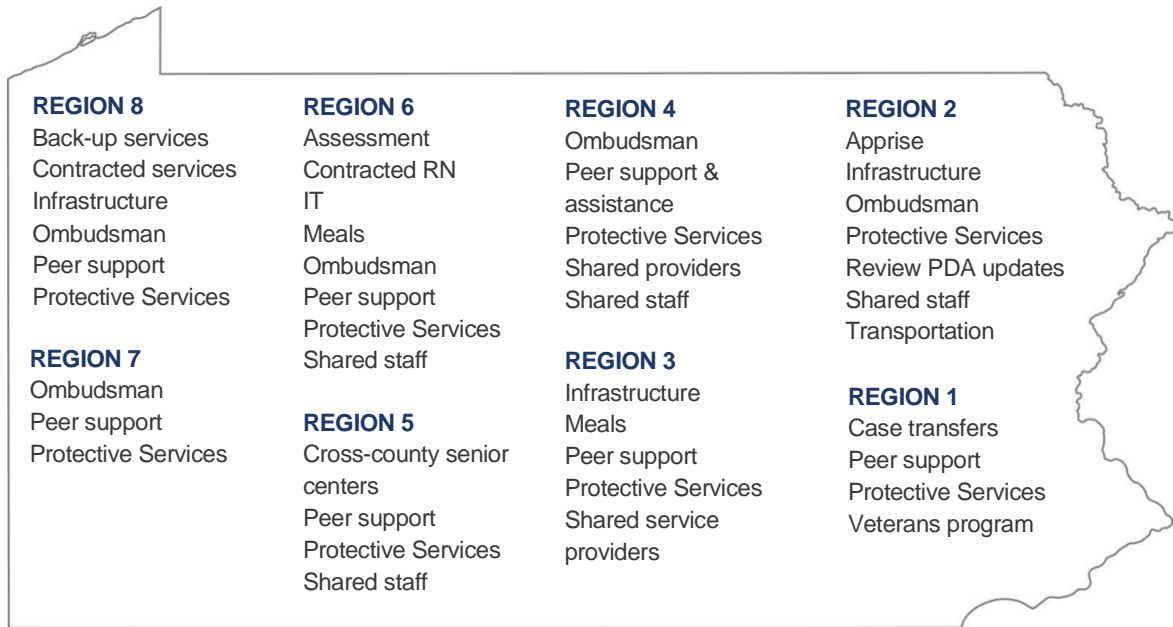


OPPORTUNITY TO LEVERAGE NETWORK STRENGTHS

Livable community initiatives offer AAAs frameworks and resources to support or lead efforts to improve age- and dementia-friendly conditions within communities. Many AAAs are participating or interested in participating in these initiatives, indicating opportunities for regional and state-wide efforts in Pennsylvania.

Robust Intra-network Collaboration

The network serves as a forum for AAA peer-to-peer support and resources, formal and informal AAA collaborations, and exploring and responding to disasters, regulations, opportunities, and threats impacting AAAs. Communications within and across the network are strong, which support the network function as a platform for AAAs to share best practices, policies and procedures, ideas, resources, and expertise. AAAs are formally and informally collaborating with each other in many different ways, particularly within regions:



OPPORTUNITY TO LEVERAGE NETWORK STRENGTHS

This diversity of activity among clusters of AAAs indicates the potential for enhancing strategic and operational ties at the regional level to solve evolving AAA challenges and meet emerging and future opportunities.

Creating Value to AAAs and Communities

The network’s core strengths add value to the work of AAAs, and in return, value to the clients and communities being served by AAAs:

NETWORK STRENGTHS	VALUE TO AAAs	VALUE TO COMMUNITIES
Aligned service objectives and unity on critical issues	Natural areas of strategic service and advocacy alignment	Array of services available in every community; state-level advocacy
Embedded in communities	Knowledgeable of community needs and assets	Services tailored to communities; health care-community connectors
Engaged, mission-driven staff	Supportive and collaborative environment, strong work ethics	Client-centered and customer service oriented
Ageing experts connected to resources	AAAs perceived as go-to resources on aging	Older adults have local, unbiased expert resources and advocates
Peer learning, support and partnerships	Quality improvement, best practices, efficiencies	Higher quality services, higher volume of services

Network communications	Well informed on political, policy, and regulatory issues	Operating responsibly according to rules and regulations
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2. FUTURE STATE OF THE NETWORK

AAAs have a strong sense of what they see as a thriving AAA network: one that is continuously planning for the future while improving what and how it delivers upon its constituent missions, anticipates and meets new opportunities for growth and advancement, and supports all of its members to achieve greater administrative and service-oriented performance. External stakeholders share many AAA sentiments when envisioning a thriving future network. These foundational visions for the network can energize a more inclusive and cohesive strategic thinking and planning processes. There is a collective interest in seeing AAAs the AAA network evolve and advance. Elements of a thriving, future-oriented AAA Network:

“[We] really do need to evolve and grow to stay relevant. And I think that is what we are going to have to do to keep our seniors engaged with us.”

Government-based AAA

- Coordinated & Integrated**
 - Strategic alignment among AAAs; collaborative relationships w/ PDA & OLTL
 - Local, regional, and statewide partnerships with health care organizations
 - Strong service & advocacy partnerships with other statewide organizations
- Performance-Based**
 - Consistent and high-quality service delivery across the network
 - Develop data systems to track, measure, show, and improve AAA performance
 - AAAs have access to performance management resources and support
- Growth-Oriented**
 - Members open to exploring ways to increase AAA service capacities
 - Network-wide niche service areas and core capabilities
 - Network-wide business model and joint contracting mechanisms
- Responsive & Innovative**
 - Demonstrated understanding of evolving consumer needs and preference
 - Adapts services and messaging to remain relevant to consumers
 - At leading edge of trends and innovation in aging (knowledge & practice)
- Proactive to Change**
 - Monitors and communicates signals and trends in policies and the market
 - Advocacy and service decisions based on policy and market insights
 - AAAs open to making changes based on network insights and foresight

Coordinated and Integrated

A thriving network has greater connection and cohesion among AAAs, as well as between the network, state agencies, health care organizations, and local, regional and statewide groups and organizations:

- All AAAs are actively engaged in network dialogues and decisions, particularly those traditionally less heard or involved
- AAAs are concerned about the financial health and operational performance of their AAA peers
- The network has a unified voice of advocacy for the growth and advancement of all AAAs at the local, regional and state level
- Political advocacy activities and campaigns are well-organized and make it easy for AAAs to be represented or to take action
- The network has a unified voice of advocacy for the experiences, health and well-being of all older Pennsylvanians
- AAAs have a stronger sense of partnership and collaboration with the Department of Aging, particularly involving developing and implementing policies and procedures
- Relationships between AAAs, the Department of Aging, and the Office of Long-Term Living are improved; both have a better sense of AAA perspectives, experiences and culture
- The network has strategic partnerships and alliances (funded and unfunded) with health care organizations and statewide advocacy and service organizations
- AAAs work together to attract new resources, achieve better outcomes, and improve performance

Performance-Based

A thriving network is one that is focused on service quality and performance above and beyond regulatory requirements, and fueled by a desire to ensure services are producing the intended client outcomes in cost-effective and consistent ways:

- Standard performance metrics help each agency better measure outcomes, benchmark performance, and continuously improve services and programs' quality and costs
- AAAs demonstrate consistent high-quality service delivery and utilize shared data systems to monitor, measure, and manage performance and identify gaps in services and populations served
- A performance-based training, monitoring, and management system embedded in the network helps AAAs, the regions, and the broader network make strategic and advocacy decisions that are aligned with the needs and interests of AAAs and their clients and helps to generate funding opportunities

Growth-Oriented

A thriving network helps attract and manage financial, strategic, and professional resources for continuous growth and advancement of AAAs and AAA services:

- All AAAs have a desire to advance and enhance the network, and contribute ideas, energy, and time to developing, supporting, and implementing a shared capacity-building plan
- The network works together to make certain services available and standardized in every AAA region, and continuously develops agreed-upon core capabilities essential to the growth and advancement of all AAAs
- Costs are evaluated, controlled, and reduced

“A thriving network is one that is continually striving to improve and solve challenges. One that is not content with the status quo. One that keeps the older adult and their needs as the focus and strives to proactively anticipate ways to meet those needs.”

Nonprofit AAA

- The network utilizes a network-wide business model and joint contracting mechanism to attract and build revenue-generating opportunities and partnerships

Responsive and Innovative

A thriving network is responsive to the current and emerging needs and preferences of older adults in each AAA community, and bases its activities and interventions on best practices and evidence available:

- All AAAs have a demonstrated understanding of the evolving experiences, needs, and preferences of older adults in their communities; the network also has a demonstrated understanding of evolving older adults experiences, needs, and preferences at the state level
- The network is known for adapting and targeting services and messaging to ensure those most in need can locate and access assistance
- The network helps to advance the work of AAAs while respecting their locally driven agendas
- AAAs are aware of and practicing leading edge trends and innovations in aging services, political advocacy and community organizing, and operations
- AAAs are using new technologies to help clients manage and connect to resources while helping their staff deliver, track, and manage direct and funded services
- Services and programs in Senior Centers are digitally enhanced and responsive to the changing needs and preferences of older adults

Proactive to Change

A thriving network orients to local and state-wide problems, opportunities, and threats proactively:

- AAAs have greater insights and foresights about current and future human services and health care policies, programs, and market trends that could threaten or expand their service lines, and current and future funding and partnership opportunities
- AAAs play a direct and meaningful role in how communities, systems, and policies are designed and respond to emerging trends
- Advocacy and service decisions at the AAA and network levels are based on policy and market insights
- AAAs are balancing and integrating their independent and local strategic priorities with those of the network

3. STRATEGIC FOCUS AREAS: REALIZING THE NETWORK'S FUTURE STATE

Five strategic focus areas encompass the ways in which the network can narrow the gap between its current and future state. While the future state portrayed what a thriving AAA network looks like in Pennsylvania, these focus areas constitute how the network can take action. All of these areas share a common imperative for the network to engage in common, shared planning and implementation processes, which would require significant engagement, buy-in, and commitments across the network:



Strengthening Older Adult Advocacy

The network offers AAAs opportunities to propel one of their greatest common threads: uniting in advocacy for all Pennsylvanians, especially those experiencing the greatest health, economic, or social challenges, to age well and with dignity.

Ideas for Network-Based Action to Strengthen Older Adult Advocacy

- Identify and prioritize existing issues and common priorities across the network, such as poorly designed programs and policies, social isolation, caregiving, nutrition / meals, or housing
- Develop research agenda to understand the issues and potential solutions
- Create and implement action plan around critical older adult advocacy issues

Ideas for Leveraging Network Assets to Strengthen Older Adult Advocacy

- Engage and build AAAs' communities of volunteers to become greater consumer advocates through editorials, political advocacy, and community organizing around key issues impacting older Pennsylvanians
- Build on existing livable community initiatives to share resources and experiences and expand to state-wide coverage of dementia-friendly and/or age-friendly communities

LEVERAGING THE NETWORK IN THE FUTURE: GOVERNMENT vs NONPROFIT AAAs

Government-based AAAs have a greater preference for leveraging the network to help develop AAA policies than nonprofit-based AAAs do. Nonprofits express greater interest in developing shared outcomes and impact assessments of services and developing collective impact efforts.

Strengthening AAA Advocacy

The network has historically come together to advocate for opportunities that positively influence the work, budgets, and services of AAAs - or to avoid negative influences. A primary purpose of the network is to advocate for the continuous advancement, inclusion, and critical role of AAAs in Pennsylvania's long-term services and supports systems. The network can take proactive, strategic steps in how it plans its advocacy activities.

Ideas for Network-Based Action to Strengthen AAA Advocacy

- Advocate to the state for flexible funding and regulations to meet consumer needs, and be able to pay for and deliver more services including mental health, personal care homes, and guardianship agencies
- Develop and deploy public messaging campaigns at the multi-AAA, regional, or state-wide level around elder rights, elder justice, common client issues, and AAA programs and services that are underutilized
- Increase public and private investments and advocacy for telehealth/virtual care usage, expansion of broadband access across the state

Ideas for Leveraging Network Assets to Strengthen AAA Advocacy

- Map, assess, target, and strengthen existing relationships with elected officials, state agencies, and aligned trade and advocacy groups
- Engage AAA volunteers to become greater political advocates for future AAA funding and inclusion in LTSS and health care financing systems
- Critique past advocacy efforts and identify areas for improvement

Enhancing Relationships & Partnerships

Building relationships and partnerships among AAAs and with targeted organizations and institutions outside of the network are critical factors to the network's success.

Ideas for Network-Based Action to Improve Relationships

- Develop an ongoing knowledge base of the network, including the experiences, perspectives, and concerns of all AAAs, and distribute this information across the network
- Assess and work to improve communications flows between AAAs, the network, and state entities
- Develop strategies and processes for fostering relationships, both within the network and between the network and outside organizations
- Assess relationships with health care organizations, state agencies, and other groups or organizations that work with or on behalf of older adults
- Identify existing relationships, ideal relational outcomes, prioritize key relationships and partnerships, and identify strategic alignment points and collaboration opportunities

Ideas for Leveraging Network Assets to Improve Relationships

- Understand how AAAs are currently working together to improve service quality and quantity, reduce costs, and advance their work; explore ways to support and expand this work, as appropriate
- Identify all current formal and informal partnerships AAAs have with health care organizations across the state, and begin developing market research and lead generation strategy to explore opportunities for network-based health care partnerships

- Analyze existing referral data to identify and quantify health care and AAA connections and alignment areas.
- Determine how current relationships with PDA and OLTL need to be improved and outline steps to try to make those improvements
- Share existing experiences and explore encouraging more health information exchange participation by AAAs

Improving Quality & Consistency

Program design and delivery quality is critical to becoming a more performance-oriented network. Improving and managing quality entails the identification and broad recognition of shared performance objectives, standards, and measures. Quality management efforts will be successful if connected to existing programs and services that reward AAAs for quality or that indicate revenue sources in the future.

Ideas for Network-Based Action to Manage Quality

- Develop and advance structures and processes for ongoing identification and sharing of AAA best practices, both within and outside the Pennsylvania network
- Identify common performance goals and measures, which could derive from AAA area plans and the new State Plan, as well as surveys conducted and published by n4a
- Develop, improve, expand training and peer mentoring practices within the network, and target learning opportunities to demonstrated AAA needs and deficiencies

Ideas for Leveraging Network Assets to Manage Quality

- Identify existing performance measurement tools, infrastructures, and databases that can be used to track, monitor, and report performance
- Coordinate research, planning, and program assessment efforts to standardize performance indicators and survey questions and track and measure outcomes and performance
- Determine how the State Plan on Aging can help the network identify, track, and monitor common performance indicators and standard measures; the network can appropriate these measures for its own development beyond PDA's use of the data
- Use data collected by PDA and others to monitor and manage network performance

"If [AAAs] want to have an impact [on key issues], they need to be consistent and they need to have a consistent message... and they have to show it everywhere across the state."

External Interviewee

Expanding AAA Capacities

A growth-oriented network is one that can expand its capacities by both becoming more efficient and increasing its financial and human resources to meet growing demand for services. Increasing revenue is unsurprisingly the most commonly ideated solution to operational and service capacity challenges.

Ideas for Network-Based Action to Expand Capacities

- Train AAAs on how to deliver cost-effective services; explore ways to reduce administrative costs
- Develop an advocacy plan for increased public funding at the local and state level; join national advocacy efforts to increase federal funding

- Improve hiring policies and processes relating to the Civil Service hiring system (or advocate to be removed from the system)
- Study and distribute findings on private pay and contract-based earned revenue strategies
- Help AAAs who may be challenged in thinking and acting (or influencing their elected officials) to become business savvy and accommodating to new forms of revenue
- Develop a data-driven business case for AAA services illustrating their unique value, impact, and cost savings
- Provide tools for AAAs to approach potential partners and funders seeking to invest in services that address the social determinants of older adults' health.
- Develop a shared business model and contracting mechanism to contract with foundations, health care delivery organizations, health plans, and private care management services at the local, regional, multi-region, and state levels.

Ideas for Leveraging Network Assets to Expand Capacities

- Reward and share existing capacity-building innovations within the network; study AAAs in Pennsylvania that have successfully diversified their revenues, using these AAA's experiences as case studies for others in the network to learn from and follow
- Understand how AAAs are already working together at the regional level to create savings and efficiencies; this learning could inform similar approaches in other regions or demonstrate areas of opportunity for cost savings at the state-wide level
- Revisit Aging Well, LLC's business plan for future strategic opportunities
- Determine if a leading AAA has the resources and political capital to lead regional or state-wide efforts and contracting opportunities
- Deploy the business and financial acumen needed to expand capacities that is already present within the network

“When I say forward thinking, we need to think about other opportunities to generate revenue that are outside of the typical pathways of federal and state funding.”

Nonprofit AAA

CONCLUSION

This profile illustrates a network with signs of strategic alignment and signs of diversified yet complementary challenges, preferences, and priorities. AAAs can easily conceive of what a thriving AAA network can look like, indicating opportunities to move in this direction. The high AAA response rate to the network survey indicates broad AAA interest in strategic thinking and planning processes, and willingness among leaders to devote time and energy to a collective effort. AAA leaders are oriented to varying degrees of organizational and network growth, adaptation, and advancement, beyond typical policy and regulatory constraints. Pennsylvania's AAAs took the opportunity in this process to think beyond the present, as a network, about where it is today, what it can be tomorrow, and the many ways it can work toward realizing a stronger, cohesive, thriving aging network for older Pennsylvanians.