
A few important notes about the AdvantAge Initiative...

The AdvantAge Initiative is a data "snapshot" of how well older adults are faring in Orange County. Its goal is to help Orange County understand what its older citizens think about where they live, what they have to offer, and what they would like to help them remain vital, independent and contributing community members.

It is a community-building effort focused on creating a vibrant and elder-friendly, or "AdvantAged",

community that is prepared to meet the needs and nurture the aspirations of older adults.

Through implementation of the recommendations developed through the AdvantAge Initiative, we will build broad awareness about aging, inform service and other planning efforts and spur needed community-wide action in the not-for-profit, public, and private sectors.

It is important to note the AdvantAge Initiative and the information contained in this report do not constitute a comprehensive

needs assessment that asks people about their needs and matches the needs to existing or planned services.

Furthermore, this *Report to the Community* does not include the complete survey data. It focuses only on the specific data AdvantAge survey that is pertinent to the final recommendations. Access to complete Orange County, Florida data is available as a community service of the University of Central Florida (see page 36 for more information).



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Message to the Community

We are proud to present you with this summary report of the AdvantAge Initiative—the first comprehensive study conducted to assess Orange County older adults' self-perceptions about their overall health and well-being.

Participation in this national initiative and survey will help identify issues of primary concern and provide critical information and recommendations to all those in a position to affect the health and well-being of older adults in our county. The results will let us more strategically establish priorities, develop interventions and commit resources, which will enable our community to make a difference in the lives of its older citizens.

The survey investigates four domains, or areas of critical importance. We used the data as a platform from which to launch discussions through a frame-the-issues process.

The AdvantAge data brought the voices of 610 older adults to the table as each issue was discussed and recommendations were developed. More than once, beliefs of frame-the-issues workshop participants conflicted with study data. However the survey results reflected the perceptions of elders regarding their health and well-being, and perception is reality. The data became the impetus for dialogues from which paradigms began to shift. Synergy occurred during the frame-the-issues process which fostered an atmosphere of cooperative problem-solving.

While indicators suggest a positive sense of health and well-being, much work remains. People live longer and remain healthier than ever before in our history, but many of these healthy elders are not actively involved in our community. We need involvement of these vital residents.

At the same time, the over-85 segment of the population continues to grow, and these elders are most likely to need support, such as home-delivered services. Advocacy for the provision of adequate home and community-based services is critical.

This summary of the AdvantAge Initiative focuses on key recommendations and other suggestions gleaned from the data and through the frame-the-issues process. Detailed data is available through Access to Better Community

Steering Committee

Data (ABCD) and the Center for Community Partnerships at the University of Central Florida. Contact information is provided at the end of this report.

This project was possible through financial and staff support provided by the Winter Park Health Foundation and the expertise of our local frame-the-issues consultant, Laura Capp of 3-D Learning. We are grateful to the Orange County Commission on Aging, Delta Leadership Council, Senior Resource Alliance and Winter Park Health Foundation's Older Adults Work Group for their guidance, support and involvement in this important endeavor.

Sincerely,

The Orange County AdvantAge Initiative Steering Committee

E. Douglas Beach, PhD: President/CEO of the Senior Resource Alliance (SRA), Member of the Orange County Commission on Aging (OCCOA) and Chair of its Transportation Committee; Member of the Delta Leadership Council; and Member of the Winter Park Health Foundation Older Adults Work Group.

Paulette Geller: Program Director - Older Adults for the Winter Park Health Foundation; Advisor to the OCCOA and Chair of its Housing Committee and Member of its Community Partnership Committee; Member of the Delta Leadership Council; and Vice Chair of the SRA Advisory Council.

Randy Hunt: President/CEO Seniors First-Orange County and Member of the Orange County Citizens Council for Homeland Security.

Cathy Lieblich: Manager for Special Projects for the Senior Resource Alliance and Member of the OCCOA Social Indicators and Community Partnerships Committees.

Ann Manley, EdD: Executive Director for The Dr. P. Phillips Foundation; Chair of the OCCOA and Chair for its Social Indicators Committee; and Member of the Delta Leadership Council.

Joan Nelson: Director of Research and Evaluation for the Heart of Florida United Way; Associate Director for the Center for Community Partnerships at the University of Central Florida; and Co-chair of the OCCOA Community Partnerships Committee.

Mimi Reggentin, AICP: Program Manager for the Orange County Commission on Aging and Member of Delta Leadership Council.

R E P O R T T O T H E C O M M U N I T Y





Preface

With the population aging, America's communities must prepare now to ensure they are ready to provide services that will help older adults remain independent and to offer programs that foster elders' creativity and dreams.

Adults age 65 and older represented 12.4 percent of the U.S. population, 17.6 percent of Floridians and 10 percent of Orange County residents in the 2000 census. A 25 percent jump in the number of Orange County older adults indicates a more rapid increase from 1990 to 2000 at the county level than in the state or nation, 18.5 percent and 12 percent respectively. And officials project an additional 200,000 people age 65 or older will live in Orange County within the next 30 years.

By 2025, the U.S. Census Bureau estimates the number of elders living in Florida will nearly double, from 2,755,000 to 5,453,000, making it the "oldest" state in the union. That distinction prompts some to worry about how Florida will provide services for this growing population. Yet, for many businesses, civic organizations and charities, mature adults—age 50 and older—offer opportunities.

The Destination Florida Commission, appointed by the governor in 2002 to evaluate the state's competitive position in attracting retirees and to recommend ways to boost that migration, pegged the value of direct spending by mature Floridians and

The local AdvantAge Initiative aims to aid Orange County in "Creating Our Community for a Lifetime," a place where people of all ages can thrive and prosper.

their federal health benefits at \$150 billion. It reported that Florida's mature residents represented, in 2000, a net benefit of \$2.8 billion in taxes to local and state governments. This means mature Floridians contribute more than they cost the state in services.

The mature market represents 33 percent of the state's population but its expenditures represent 55 percent

of all consumer purchases. Per capita, mature Floridians spend \$2.50 for every dollar spent by people age 18 to 49.

In addition to fueling the state's economic engine, mature adults donated more than \$3.5 billion to philanthropic causes in 2000, and contributed 7.5 million person days at volunteer activities.

Of some concern, census statistics show the number of Floridians age 85 or older grew by 58 percent from 1990 to 2000. This fast-growing segment of the older population typically requires more health-care and support services than their younger counterparts. And the increasing numbers in this segment of the population will not change any time soon. The Census Bureau projects that nationally the over-85 population could increase from 4 million to 19 million by 2050.

Consequently, Orange County, as well as the state, must make preparations to meet its older adults' needs. Information provides the key to developing programs that will address what elders will require to remain independent, contributing to the community and fulfilling their passions.

The local AdvantAge Initiative aims to aid the Orange County community in "Creating Our Community for a Lifetime," a place where people of all ages can thrive and prosper. The survey serves as a snapshot of residents' opinions and a starting point. As we move forward and implement an action plan, based on the data, the survey results will provide points of reference from which to gauge our progress.

Statistics for this section of the report came from the U.S. Census Bureau, Orange County Commission on Aging and the Destination Florida Commission report.



AdvantAge Initiative

A community-building effort, the AdvantAge Initiative provides a framework for creating communities in the U.S. where older adults can enjoy healthy, independent, productive and satisfying lives. AdvantAged communities build their capacity to support all older people, including the frail and disabled, and aim to engage elders in activities that improve the civic and social climate.

Ten communities from around the country have stepped forward to pioneer this effort. In addition to Orange County, Florida, the communities include: Northwest Chicago, Illinois; Indianapolis, Indiana; Jacksonville, Florida; the Lincoln Square Neighborhood of New York City; Maricopa County, Arizona; Puyallup, Washington; Santa Clarita, California; the Upper West Side of New York City; and Yonkers, New York. Our local initiative was made possible through support from the Winter Park Health Foundation.

In each AdvantAge community, the process began with a comprehensive survey to increase understanding of what older adults think about services offered and where additional help is needed. The results provide a view of how well elders fare in the community and may challenge long-held beliefs by professionals and service providers.

Community leaders can draw on the data to develop an action plan that will address weaknesses and build on

strengths. Advocates can use the information to raise awareness about and support for aging issues. Most importantly, the results will serve as a benchmark from which to measure the success of strategies implemented as a result of the survey.

Nationwide, several major organizations support the AdvantAge Initiative, including the Winter Park Health Foundation, Archstone Foundation, The Atlantic Philanthropies, Helen Andrus Benedict Foundation, John A. Hartford Foundation, The Robert Wood Johnson Foundation, CICOA—The Access Network, Mather LifeWays (Chicago, Ill.), the Virginia G. Piper Charitable Trust (Phoenix/Scottsdale, Ariz.), The Retirement Research Foundation, The Fan Fox and Leslie R. Samuels Foundation.

AdvantAge Initiative in Orange County, Florida

Orange County leaders and funders, recognizing the need for benchmarking data before embarking on the Florida Department of Elder Affairs campaign called "Creating Our Community for a Lifetime," joined the AdvantAge Initiative in 2001.

The Winter Park Health Foundation spearheaded the local effort in collaboration with the Orange County Commission on Aging, the Senior Resource Alliance, The Dr. P. Phillips Foundation, the University of Central Florida, Heart of Florida United Way and Seniors First. A steering committee comprised of representatives from each organization promoted the Orange County Commission on Aging's vision and purpose statements:

Vision: An elder-friendly community that empowers older adults through choices that allow them to support and maintain their independence within their home community.

Purpose: To identify the needs of the senior population and find ways to help by working collaboratively.

Another key collaborator was the Delta Leadership Council. This group of local funders, both public and private, has as its mission: to develop and sustain a responsive, accessible system that provides opportunities for older persons throughout our communities to maintain dignity, independence and health.

In 2002, 610 randomly selected adults, age 65 and over, responded to telephone survey questions posed by professional researchers from the national initiative. The local steering committee received the results and

spent the first half of 2003 conducting 11 “frame the issues” workshops to review the survey data and identify and prioritize strategies to address the key issues.

More than 100 community leaders, service providers and consumers participated in the frame-the-issues workshops (see list of participants on page 35). This was an inclusive process and all stakeholders concerned with issues affecting older adults were invited to participate. The process concluded with a strategy retreat where workshop recommendations were distilled into priorities for the Orange County community.

Based on the results of the local AdvantAge Initiative, stakeholders will focus planning, funding and programming for older adult services in Orange County on the 33 recommendations identified and published in this report.

AdvantAge Initiative Glossary

Caregiver: Any professional, family member, friend or volunteer who is involved with providing care and support to another person.

Domains: In the AdvantAge Initiative, there are four “domains,” or areas that define an “elder friendly community.” Thus, an elder friendly community 1) attends to older people’s basic needs, 2) helps optimize their physical and mental health and well-being, 3) promotes older people’s social and civic engagement, and 4) helps maximize independence among the frail and disabled.

Indicator: An indicator is a qualitative or quantitative measure that is used to determine the state of some thing, such as the health of a person, the quality of life in a community, or a country’s economy. For example, the U.S. government uses a set of measures called “leading

economic indicators” to assess the “health” of the U.S. economy, and these may include such measures as unemployment rates, trade deficits, and so on. In the AdvantAge Initiative, the 33 indicators help assess the status of community-residing older people within four domains.

Unweighted N: This refers to the number of respondents who completed the AdvantAge Initiative telephone survey of adults aged 65 and older in each of the ten AdvantAge Initiative communities, including Orange County. In Orange County, the unweighted N is equal to 610, which means that 610 people 65+ in Orange County completed the survey interviews.

Weighted N: In order to be able to generalize responses from the people who completed the survey interviews (the Unweighted N) to the larger 65+

population in the community, calculations must first be performed using "weights." This statistical process assures that the characteristics of the people interviewed in the survey reflect the actual characteristics of the larger population of people aged 65+ living in that community. Thus, in Orange County, the Unweighted N of 610 represents the Weighted N of 85,829 people aged 65+ living in the community.

ADLs: Activities of daily living such as eating, bathing, dressing, mobility, and toileting

IADLs: Instrumental activities of daily living such as paying bills, using the telephone, going shopping, etc.

For more information on the national AdvantAge Initiative go to www.advantageinitiative.org

AdvantAge Initiative Framework



AdvantAge Survey Methodology

Before beginning the survey process, the national AdvantAge Initiative conducted focus groups comprised of older adults and community leaders. The participants in various parts of the country critiqued their communities and described an ideal setting for aging in place.

A similar theme resonated regardless of the location: People wished to remain active and engaged in community life, independent, avoiding isolation and not becoming a burden to others. The national AdvantAge Initiative synthesized the responses into a framework that identifies an elder-friendly community and organized these components into four broad categories, or domains (see framework diagram on previous page).

The four domains include basic needs for housing and security; maintenance of physical and mental health; independence for the frail, disabled and homebound; and opportunities for social and civic engagement. The AdvantAge Initiative divided each of the domains into dimensions to provide more detailed descriptions.

The national AdvantAge Initiative team sought suggestions from community development experts, journalists, survey-design experts and government officials. These leaders provided guidance for refining indicators and benchmarks pertaining to the dimensions and domains.

These indicators allow the data to be tracked over time. As an example, weight, blood pressure, muscle

strength or other indicators can measure physical health. All contribute to, but do not cause, physical health. Yet tracking these measurable indicators enables a community to assess its efforts toward creating healthier citizens. Results from the AdvantAge survey data can help set benchmarks to track progress on the many indicators measured by the survey.

The next step, a telephone survey, focused on the domains and dimensions, and measured how well each community at the time of the survey met the needs of its older adults.

The national AdvantAge Initiative team contracted with the research firm WESTAT Survey Research to conduct 30-minute telephone surveys with randomly selected

adults age 65 or older in the 10 participating communities including Orange County, Florida. It sampled adults age 85 and older at higher rates to allow for separate analysis of the data by age group.

WESTAT drew the statistically valid samples from Medicare enrollment lists, which capture approximately 98 percent of the age 65-plus U.S. population. The company matched randomly selected individual names with existing databases of addresses with telephone numbers.

Each potential survey respondent received two mailings describing the purpose of the survey. The first letter informed recipients that participating was voluntary, assured people that their answers would remain confidential and provided a toll-free number to call if they had questions about the survey process. The second, a postcard, reminded recipients about the forthcoming

call. In addition, in Orange County, Florida, the local steering committee was concerned recipients would not respond to the telephone survey; therefore, a letter was sent from the Orange County Sheriff's Office to validate the legitimacy of the survey.

The national AdvantAge Initiative developed a questionnaire specific to the project for use in all 10 community surveys. Each community could add up to five questions, specific to its locale, to the basic 107-question survey. In each community, including Orange County, the local AdvantAge steering committee shaped these questions.

WESTAT also translated the questionnaire into Spanish, and interviewers could conduct the interview in Spanish when requested.

More than 5,100 people in the 10 communities completed the survey between January and May 2002. WESTAT, in accordance with standard surveying practice, applied a three-

step weighting scheme to each respondent to adjust for nonresponse and for varying probabilities of selection. It also weighted the data based on demographic characteristics, using the 2000 census data to ensure results representative of adults age 65 or older living in noninstitutional settings in each community. The characteristics included age, sex, race/ethnicity, home ownership, educational attainment and marital status.

The margin of error for the local Orange County, Florida, study is plus/minus 3 percent. In analysis by subgroups, the error will be higher due to smaller sample size.

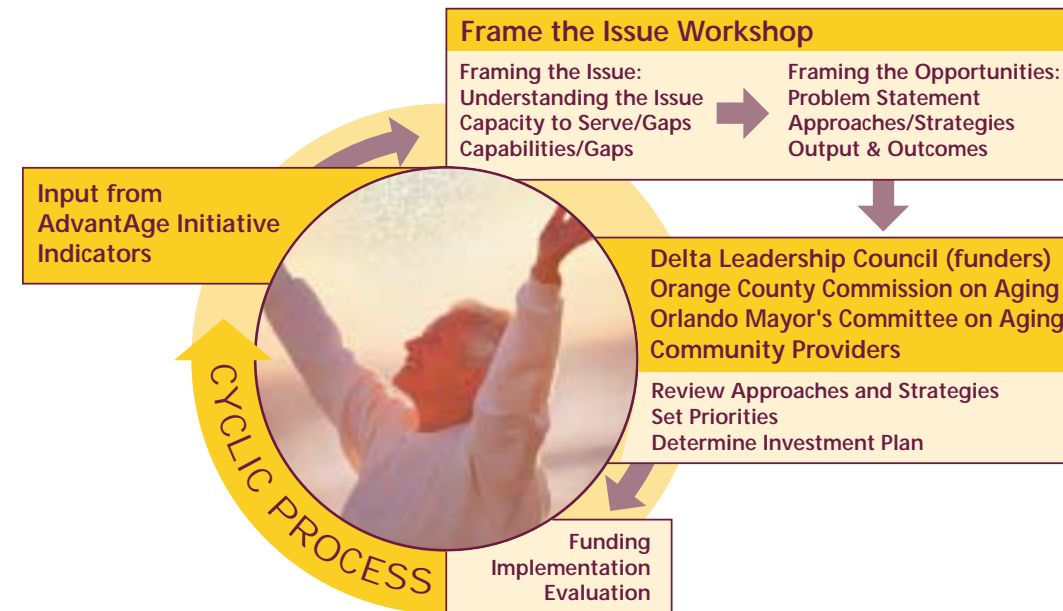
The national AdvantAge Initiative released a chart book with complete survey results to each community. The complete Orange County, Florida, data is available via the University of Central Florida and its Access to Better Community Data service and Center for Community Partnerships.

The Frame the Issues Process

The national AdvantAge Initiative suggested participating communities employ a process called "frame the issues," to break the survey into usable data and set priorities. The Kettering Foundation developed the process and consultant Phil Stafford from the Evergreen Institute on Elder Environments adapted it for the AdvantAge Initiative.

Members of each community would come together as a local AdvantAge Initiative team to process the information, identify and define issues, frame opportunities or ways to approach the challenges, then determine how to evaluate progress for each indicator.

Orange County enthusiastically embraced this process and the local Steering Committee held 11 frame-the-issues workshops from January



to June 2003. More than 100 people, including senior advocates, service groups, planners and policymakers attended one or more of the workshops. Participants identified and prioritized strategies for addressing key issues. The Steering Committee determined an evaluation encompassing the entire project would be more useful than one for

each indicator in isolation.

Workshop participants generated 106 strategies and developed a set of 33 recommendations considered important and feasible to implement. The group concluded there is no single approach that will apply to all older adults. However, transportation affects seniors' lives more than other

areas of concern, followed by physical and mental health. In addition, increased advocacy and communications are needed to advance issues affecting older adults.

As with findings of other AdvantAge communities, our local group determined older adults want to remain independent, and in control, for as long as possible and want services to help them choose where to live, how to get around, interact with their community and care for their health. When older adults can no longer care for themselves, the people who assist them need information, training and support.

The local Steering Committee, with the help of Sente Corporation, surveyed people who had participated in five or more of the workshops to identify funding priorities. Participants received the survey results during a strategy retreat to formulate a platform. This report summarizes their conclusions.

FRAME THE ISSUES WORKSHOPS

Orange County, Florida Advantage Initiative 2003

DATE	TOPIC
January 16	Knowledge of Information Services
February 25	Volunteerism
March 4	Physical Activity
March 25	Housing
April 1	Social & Civic Engagement
April 22	Caregivers
May 6	Livable Neighborhoods
May 13	Maximize Independence
May 20	Employment
June 10	Optimizing Physical Health
June 24	Transportation
August 27	Strategy Retreat



Recommendations for Action

Upon assimilation of the AdvantAge survey results and completion of the frame-the-issues process, the local AdvantAge Initiative team concluded there are 33 key and supportive recommendations for action as Orange County strives to "Create Our Community for a Lifetime."

The AdvantAge Initiative uses domains to demarcate areas of significant impact on older adults. Stakeholders and policymakers must embrace a holistic approach and focus efforts on all four domains simultaneously. As a community, we must also support ongoing programs, such as the 2-1-1 information line and home-delivered meals. Via the AdvantAge survey, older adults in Orange County may not have voiced concern about how to find services or food, because current programs

addressing these needs are functioning well. Continued support for such programs is critical lest they become areas of concern.

The diagram on page 16 highlights key recommendations for each AdvantAge domain as well as the overarching priority to increase advocacy and public awareness about the need for more funding of home and community-based services, the cost-effectiveness of these programs and the positive aspects of vital aging, as well as the challenges of later life.

A complete summary of Orange County AdvantAge Initiative recommendations, along with relative data, follows on pages 17 through 32. Many of the issues and recommendations reach beyond Orange County and will require collaboration with neighboring communities.

Overview: Key Recommendations for Orange County, Florida



Domain A: Addresses Basic Needs

The first AdvantAge Initiative domain evaluated whether the community provides appropriate and affordable housing, promotes home and neighborhood safety and assures its residents have adequate food. It also examined older adults' knowledge of local services and their awareness of how to access such resources.

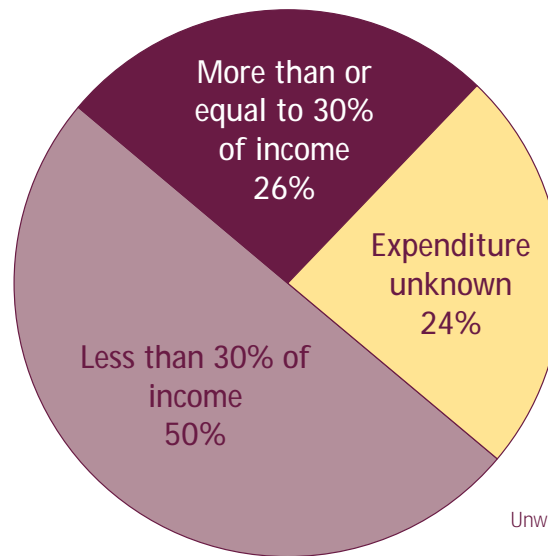
Key Recommendations

More than one-quarter, 26 percent, of Orange County elders spend 30 percent or more of their annual income on housing; an amount considered too high to be affordable by the U.S. Department of Housing and Urban Development (see figure A1).

The local AdvantAge Initiative team recommended developing more affordable housing units, preferably

A1. HOUSING COST vs. INCOME

*Percentage of people age 65+ in Orange County who spend $\geq 30\%$ / $< 30\%$ of their income on housing**



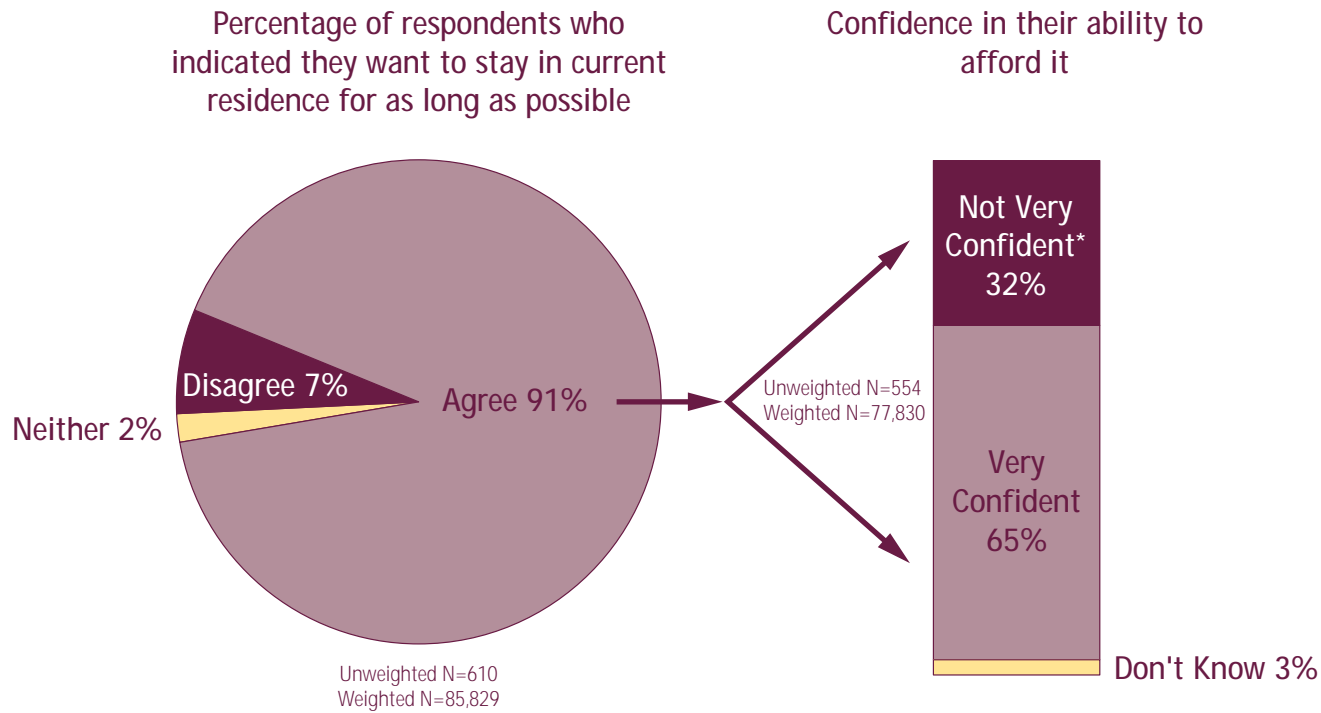
Unweighted N=610 Weighted N=85,829

Source: *Orange County, FL AdvantAge Survey, 2002*

*Annual housing expenditure was calculated based on outlays for rent or mortgage, real estate taxes, association/condo fees, and utilities as a percentage of income. The U.S. Department of Housing and Urban Development defines affordable housing as spending no more than 30% of annual income on housing. Survey respondents were classified in the category "expenditure unknown" if they did not provide enough information to calculate their annual housing expenditure as a percentage of income. Note: In national surveys, about one fifth to more than one third of survey respondents are reluctant to provide sufficient information necessary to calculate their income.

A2. HOUSING AFFORDABILITY

Percentage of people age 65+ in Orange County who want to remain in their current residence and are confident they will be able to afford to do so



Survey respondents were asked to agree or disagree with the following statement: "What I'd really like to do is stay in my current residence for as long as possible."

Respondents who answered "agree" were asked to indicate how confident they were that they would be able to afford to live in their current residence for as long as they would like.

* Not Very Confident includes those who responded "somewhat confident," "not too confident," or "not confident at all."

in mixed-income, intergenerational neighborhoods. These projects would target those at or below 200 percent of poverty and provide ancillary services when appropriate. The team also advised coordinating funding opportunities among housing providers, faith communities and the public.

An overwhelming majority of Orange County elders, 91 percent, want to continue living in their current residence. Yet only 65 percent are very confident that will be possible. The remaining 32 percent are not very confident (see figure A2).

Local AdvantAge Initiative team members recommended providing additional support at home, where civic groups and faith communities could adopt a home or high-rise retirement communities.

Additional Recommendations

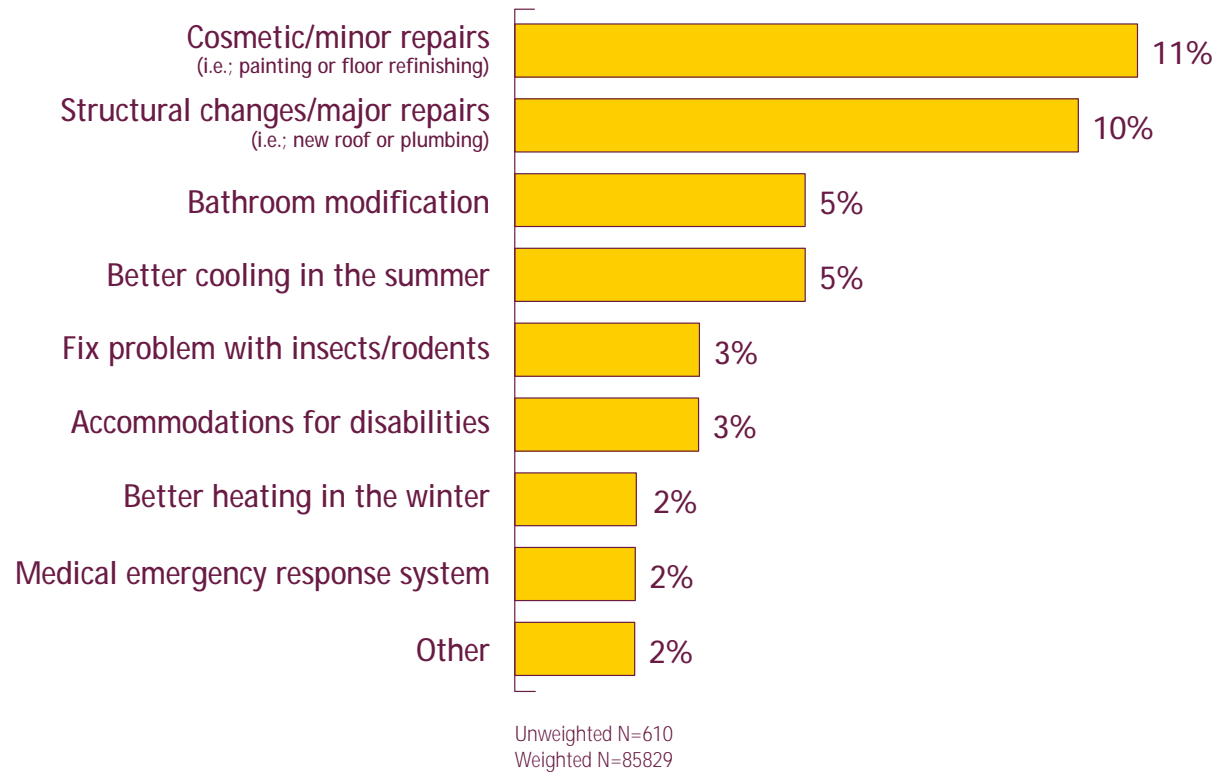
Fifteen percent of the respondents indicated their current residence needs changes or repairs to improve their ability to remain at home during the next five years, with 85 percent planning to make these modifications. Improvements included everything from minor cosmetic changes to structural repairs (see figure A3).

In response, the local AdvantAge Initiative team made several recommendations. These included:

- Sponsor a home safety assessment program that would be available at no charge to citizens, possibly in connection with the Sheriff's Office and local fire departments.
- Publish an organized booklet and/or establish a network of trusted home-repair workers.

A3. HOME IMPROVEMENTS/REPAIRS

Percentage of people age 65+ in Orange County whose residence needs each of the following modifications or repairs



Source: Orange County, FL AdvantAge Survey, 2002

Two other recommendations pertaining to basic need included:

- Learn from planned communities what building blocks create a sense of neighborhood, and identify successful models.
- Expand neighborhood-based programs for preventing and reporting crime.

DOMAIN A: SUMMARY OF RECOMMENDATIONS

Key Recommendations

- Provide more affordable housing units, preferably in mixed income and intergenerational projects, targeted to those at or below 200% of poverty, and provide ancillary services, when appropriate.
- Coordinate housing providers and funding opportunities among housing providers, faith communities and the public.
- Provide additional support at home, where civic groups and faith communities adopt a home or high rise.

Additional Recommendations

- Sponsor a home safety assessment program at no charge to citizens, possibly in connection with the Sheriff's Office and local fire departments.
- Publish an organized booklet and/or establish a network of trusted home repair workers.
- Learn from planned communities what the building blocks are that create a sense of neighborhood.
- Expand neighborhood-based programs for preventing/reporting crime.

Domain B: Optimizes Physical & Mental Health and Well-Being

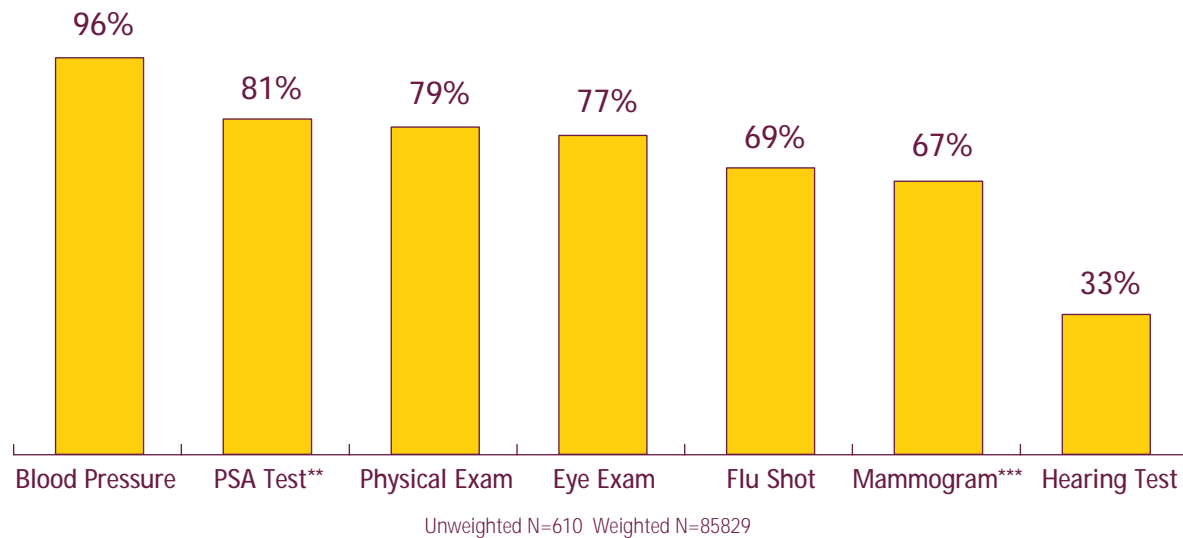
The second AdvantAge Initiative domain addressed whether communities promote healthy behaviors, support activities that enhance well-being, and provide access to preventive health programs, as well as medical, social and palliative services.

Key Recommendations

Survey results indicated the majority of older adults in Orange County received most of the recommended preventive services during the preceding year. While almost all respondents had their blood pressure checked, only 69 percent obtained a flu shot and 33 percent a hearing test (see figure B1).

B1. HEALTH SCREENINGS

Rates of screening and/or immunization among people 65+ in Orange County (Percentage of seniors who received each preventive service in the past 12 months)*



*Survey respondents were asked whether they had any of these preventive measures in the past 12 months.

**PSA Test (prostate cancer screening) for men only (Unweighted N=257; Weighted N=35939)

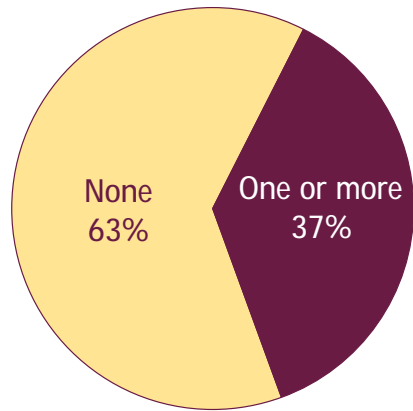
***Mammogram for women only (Unweighted N=353; Weighted N=49890)

Source: Orange County, FL AdvantAge Survey, 2002

B2. PHYSICAL & MENTAL HEALTH

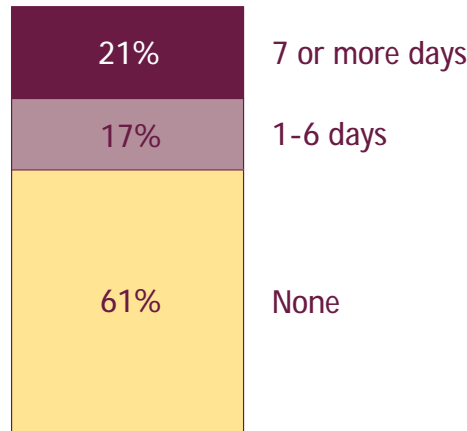
Percentage of people age 65+ in Orange County whose physical or mental health interfered with their activities in the past month

Percentage of respondents who experienced at least one "unhealthy day" in past month*



Unweighted N=610
Weighted N=85829

Number of days in past month when physical or mental health interfered with activities**



Unweighted N=224
Weighted N=31591

Note: Percentages may not add up to 100% due to rounding and/or missing information.

*The number of "unhealthy" days is based on a summary index from the following two questions: 1) "Thinking about your physical health, which includes physical illness and injury, for how many days during the past 30 days was your physical health not good?" and 2) "Thinking about your mental health, which includes stress, depression, and problems with emotions, for how many days during the past 30 days was your mental health not good?"

**People who had one or more "unhealthy" days were asked "During the past 30 days, for how many days did poor physical or mental health keep you from doing your usual activities, such as self-care, work, or recreation?"

In addition, 37 percent of respondents indicated that within the past month they had one or more unhealthy days for which they classified their physical and/or mental health as "not good." Of those, more than one in five, 21 percent, said their physical or mental health condition kept them from doing their usual activities, such as self-care, work or recreation, for seven or more days (see figure B2).

In Orange County, nine percent of people age 65+ said there was a time in the past year when they thought they needed the help of a health professional or a counselor because they felt depressed or anxious. Of those, more than two in five, 42 percent, did not obtain the professional help they thought they needed (see figure B3). Some of the reasons cited for not seeing a health

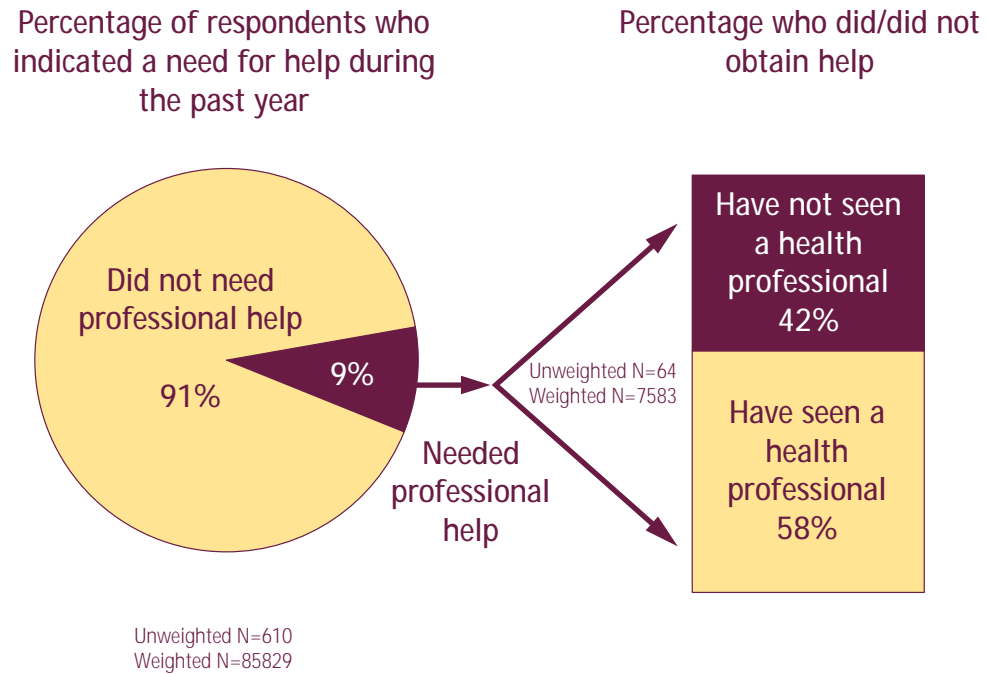
professional were cost, lack of time and the expectation that symptoms would pass.

In response, the local AdvantAge Initiative team made the following recommendations:

- Expand senior assessment centers for "next steps," such as finding seniors a medical home after assessment.
- Institute and expand early interventions that will identify older adults at risk for depression, anxiety and other mental health issues, with appropriate follow up.
- Develop an expanded mobile, one-stop unit that would provide, on an accessible and affordable basis, all preventive screening services relevant to seniors.

B3 SEEKING HELP FOR DEPRESSION OR ANXIOUSNESS

Percentage of people age 65+ in Orange County who thought they needed the help of a health care professional because they felt depressed or anxious and have not seen one (for those symptoms)



People were asked whether in the past year there was a time when they thought they needed the help of a health professional or a counselor because they felt depressed or anxious.

People who answered "yes" were asked whether they obtained the professional help or counseling they thought they needed.

Source: Orange County, FL AdvantAge Survey, 2002

Additional Recommendations

The local AdvantAge Initiative team made several other recommendations. These included:

- Enhance awareness of health-related issues, the value of physical activity and opportunities to get involved through a public-awareness campaign.
- Establish a culturally sensitive peer-counseling program, including recruitment of culturally sensitive volunteers to counsel those needing help paying for prescription drugs and for medication follow-up.
- Encourage appropriate professional organizations to sponsor more education and public-awareness campaigns about the importance of vision and dental care.
- Work with faith-based and other community groups to expand education for older members about mental health issues.

DOMAIN B: SUMMARY OF RECOMMENDATIONS

Key Recommendations

- Expand senior assessment centers for “next steps,” i.e. finding seniors a medical home after assessment.
- Intervene early to identify those at risk for depression, anxiety and other mental health issues, with appropriate options.
- Develop an expanded mobile, one-stop unit that includes all preventive screening services relevant to seniors, and is accessible and affordable.

Additional Recommendations

- Public education to enhance awareness of health-related issues, the value of physical activity and opportunities to get involved.
- Establish a culturally sensitive peer counseling program, including recruitment of culturally sensitive volunteers to counsel those needing help paying for prescription drugs, and for medication follow-up.
- Initiate an education/public-awareness campaign about the importance of vision and dental care, sponsored by appropriate professional organizations.
- Work with faith-based and other community groups to educate older members about mental health.

Domain C: Promotes Social and Civic Engagement

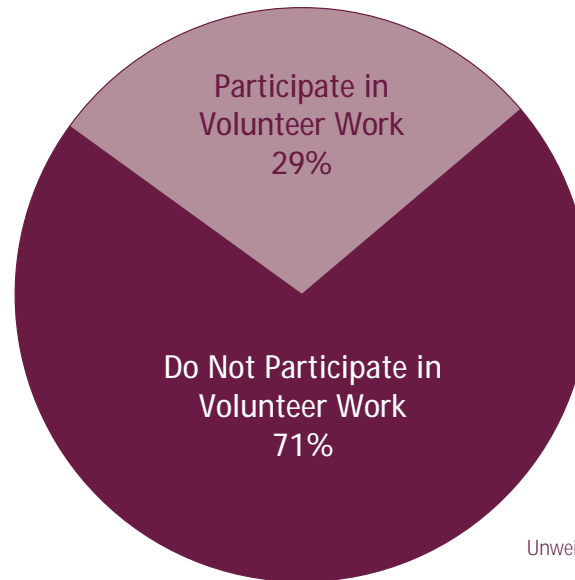
The third AdvantAge Initiative domain pertained to social and civic involvement and assessed how well communities foster meaningful connections with family, neighbors and friends; promote active engagement in community life; provide opportunities for meaningful paid and voluntary work; and make aging issues a community-wide priority.

Key Recommendations

In Orange County, only 29 percent of elders participate in volunteer work (see figure C1). Main outlets for volunteering include religious groups, 67 percent; hospitals, 13 percent; senior service agencies, 12 percent; civic or social organizations,

C1. VOLUNTEER WORK

Percentage of people age 65+ in Orange County who participate in volunteer work

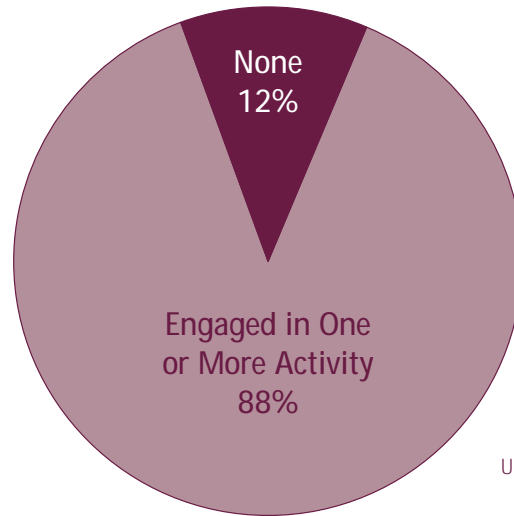


Unweighted N=610 Weighted N=85,829

Source: *Orange County, FL AdvantAge Survey, 2002*

C2. COMMUNITY ENGAGEMENT

Percentage of people age 65+ in Orange County who engaged in at least one social, religious, or cultural activity in the past week



Unweighted N=610 Weighted N=85829

Source: *Orange County, FL AdvantAge Survey, 2002*

11 percent; or educational assistance programs, 11 percent. Of those who give of their time, 45 percent spent less than five hours per week in volunteer pursuits, 25 percent spent five to nine hours weekly volunteering and 23 percent spent 10 or more hours per week helping others.

Volunteer contributions enrich a community, therefore it is important to boost volunteerism among older adults.

Another form of community engagement for elders is participating in social, religious or cultural activities. Nearly nine of

10 respondents in Orange County, or 88 percent, engaged in one or more such activities in the week prior to the AdvantAge Survey telephone interview, however, over 12 percent did not (see figure C2).

Nearly one quarter, 23 percent, engaged in one activity, 39 percent participated in two activities, and 26 percent participated in three activities.

For many seniors, employment acts as a means to stay engaged; for others, it may be a necessity. Only 7 percent of Orange County seniors work full time, and 10 percent hold a part-time job. Of the 83 percent who are not working, 21 percent would like to work for pay (see figure C3).

To promote social and civic engagement among elders in Orange County, the local AdvantAge Initiative team made the following recommendations:

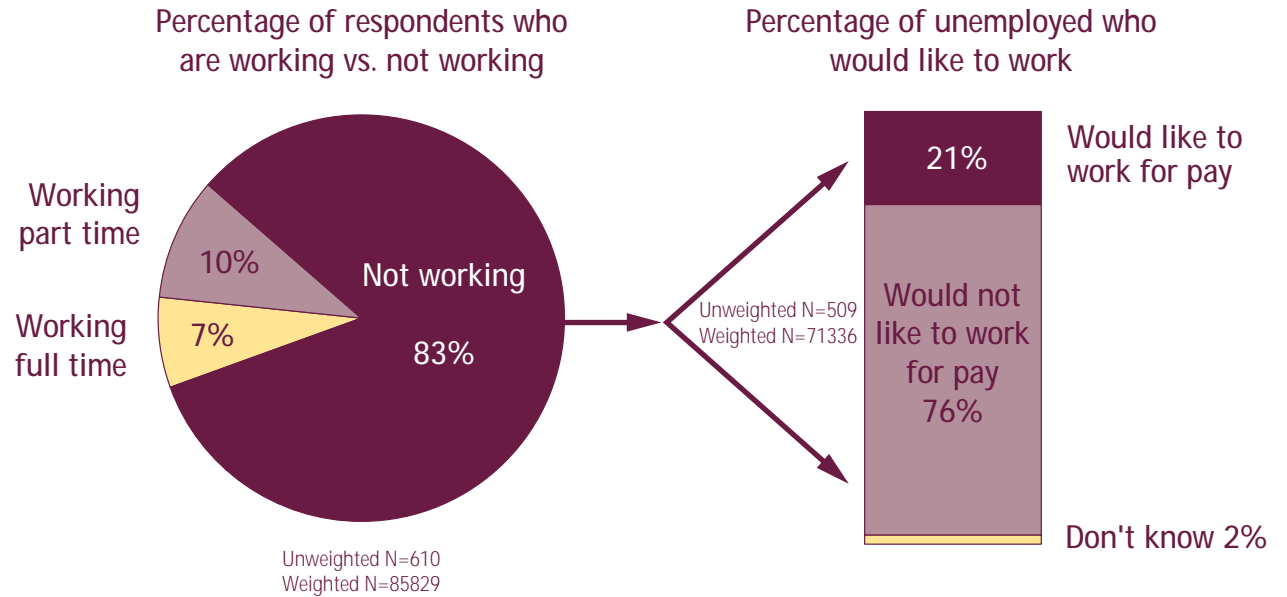
- Increase the capacity of agencies and businesses to recruit, utilize and retain volunteers in a meaningful way, including finding ways to match volunteers' interests and experiences with community needs.
- Transform neighborhood schools into community centers for all ages and activities, including use of school buses as a transportation option for seniors.
- Conduct a vital aging awareness campaign to display positive examples of older adults as volunteers and employees.

Additional Recommendations

- Increase awareness of volunteer opportunities and hours available.
- Show volunteers the value and significance of the difference they are making by acknowledging them and showing the cost savings or outcomes of their efforts.

C3. WORKING FOR PAY

Percentage of people age 65+ in Orange County who would like to be working for pay



Note: Percentages may not add up to 100% due to rounding and/or missing information.

Survey respondents were asked what their current employment status is.

Those respondents who were not working were asked whether they would like to be working for pay.

Source: Orange County, FL AdvantAge Survey, 2002

- Provide flexibility in volunteer opportunities, including times, locations, group opportunities and time-limited opportunities.
- Establish an older adult employment service to match older adults with employment opportunities.
- Develop a corps of senior volunteers or ambassadors to market, by speaking to civic and faith-based groups, the various learning opportunities available.

DOMAIN C: SUMMARY OF RECOMMENDATIONS

Key Recommendations

- Increase the capacity of agencies to recruit, utilize and retain volunteers in a meaningful way, including how to match volunteers' interests and experiences with community needs.
- Transform neighborhood schools into community centers for all ages and activities, including use of school buses as a transportation option for seniors.
- Conduct a vital aging awareness campaign to display positive examples of older adults as volunteers and employees.

Additional Recommendations

- Increase awareness of volunteer opportunities and hours available, e.g., through visits to community organizations and businesses.
- Show volunteers the value and significance of the difference they are making by acknowledging them and showing the cost savings or outcomes of their efforts.
- Provide flexibility in volunteer opportunities including times, locations, group opportunities and time-limited opportunities.
- Establish an older adult employment service to match older adults with employment opportunities.
- Develop a corps of senior volunteers/ambassadors to market the various learning opportunities available by speaking to civic and faith-based groups.

Domain D: Maximizes Independence for the Frail and Disabled

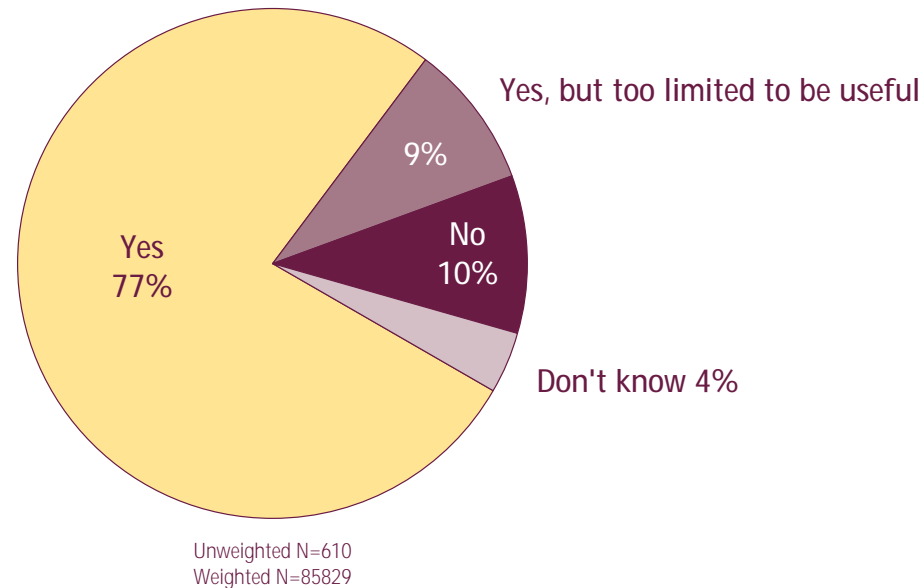
The fourth and final AdvantAge Initiative domain focused on ways communities can promote independence for frail and disabled older adults. It addressed strategies for mobilizing resources to facilitate living at home, providing accessible transportation, and supporting family and other caregivers. As the over-85 population grows, associated support will need to expand as well.

Key Recommendations

Overwhelmingly, participants in all the Orange County AdvantAge Initiative frame-the-issues workshops emphasized transportation as critical to seniors' quality of life.

D1. PUBLIC TRANSPORTATION

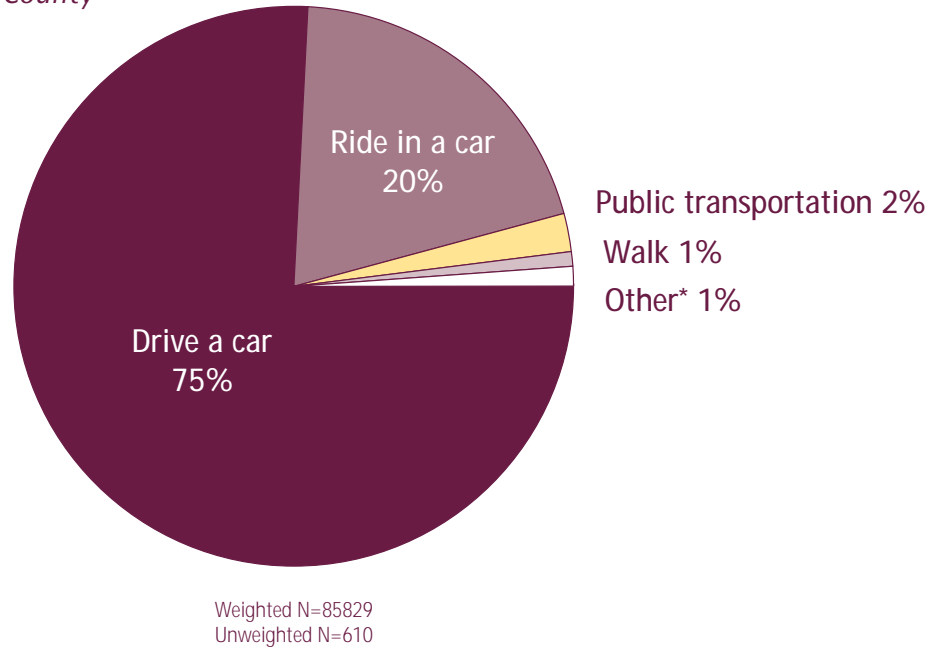
Percentage of people age 65+ in Orange County who believe public transportation is available in their community



Source: Orange County, FL AdvantAge Survey, 2002

D2. MEANS OF TRANSPORTATION

Means of transportation used most frequently by people age 65+ in Orange County



Note: Percentages may not add up to 100% due to rounding and/or missing information.
*Includes taxi, special transportation, and other.

Source: Orange County, FL AdvantAge Survey, 2002

While more than three quarters of survey respondents in Orange County, 77 percent, said public transportation is available in the community, 10 percent thought it did not exist, and 9 percent believed it

too limited to be useful (see figure D1). Only 1 percent of respondents used public transportation two or more days per week. Another 6 percent used it less frequently, while 78 percent never used it. The most

frequent mode of transportation for those surveyed was driving a car, 75 percent, followed by riding in a car, 20 percent (see figure D2).

Although survey results did not indicate respondents were greatly concerned about transportation, participants in all the frame-the-issues workshops emphasized the need to address safe driving, elder-friendly roadways and transportation alternatives when driving is no longer an appropriate option for older adults. It is important to note that other community studies have shown a lack of transportation services may contribute to survey results that show low utilization of public transit.

Upon review of the survey results and recognizing transportation issues present one of the more vexing challenges to elders' independence, the local AdvantAge Initiative team recommended the following:

- Coordinate community transportation resources, including private investment in equipment, finances, ridership and safe driving programs.

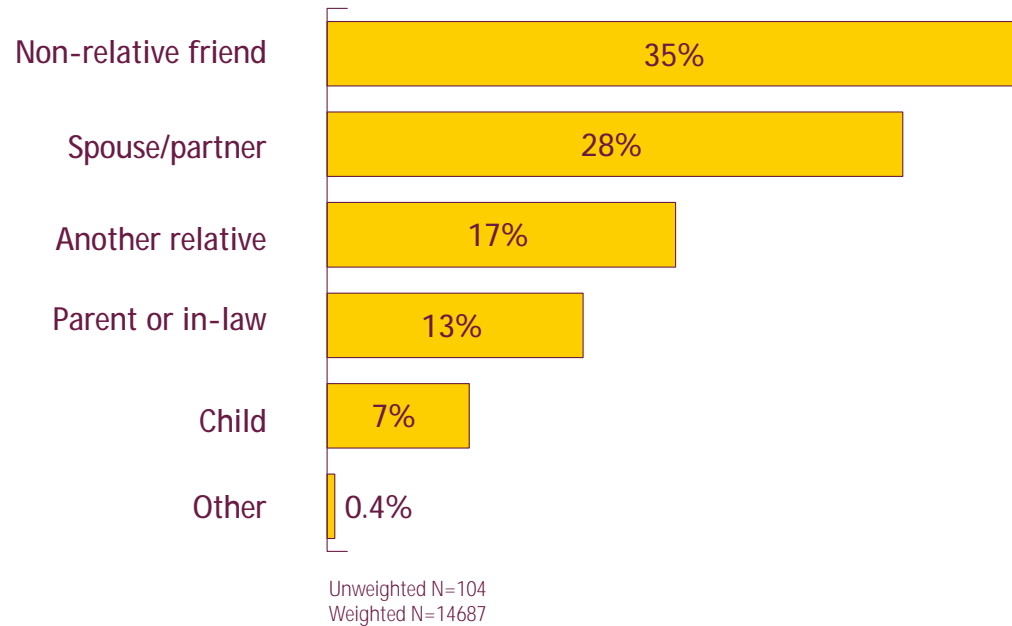
- Make roadways and transportation systems elder friendly and appropriate for all end users via better signage, crosswalks, intersections, etc.

Seventeen percent of older adults in Orange County provide help or care, or arrange for services, for a relative or friend who is unable to perform these activities due to illness or disability. Among those caregivers, 35 percent provide assistance to a friend who is not a family member, 28 percent a spouse or partner, 17 percent another relative, 13 percent a parent or in-law, and 7 percent a child (see figure D3).

The local AdvantAge Initiative team suggested the following:

D3. CAREGIVER RELATIONSHIPS

*Relationships between caregivers age 65+ in Orange County and care recipients**



Note: Percentages may not add up to 100% due to rounding and/or missing information.
*The 17 percent of respondents who indicated they were a caregiver, were asked "What is this person's relationship to you?"

Source: *Orange County, FL AdvantAge Survey, 2002*

- Provide community education about caregiving to cover current needs and future trends and recognition of caregiving as a universal issue and an achievable activity.

- Train and educate caregivers and respite-care workers about cooperative relationships and other needed skills, self-care and knowledge of resources. The team

also recommends ongoing, expanded training for 2-1-1 operators and emergency personnel.

Additional Recommendations

- Call on faith communities to help their members with instrumental activities of daily living (IADLs), such as preparing meals, shopping or performing light housework.
- Build neighborhood capacity to provide services for people that need assistance with IADLs.
- Increase public awareness and community education about available resources that can help people who need assistance with activities of daily living (ADLs), such as bathing, dressing and using the toilet, as well as IADLs.
- Offer mobility counseling and education that would direct seniors to appropriate transportation options and how to access them. This may include driver testing and education.

DOMAIN D: SUMMARY OF RECOMMENDATIONS

Key Recommendations

- Coordinate community transportation resources, including private investment, i.e. equipment, finances, and ridership.
- Make transportation system elder-friendly and appropriate for all end users through better signage, crosswalks, intersections, etc.
- Educate community about caregiving, including current needs and future trends, as well as recognition of caregiving as a universal issue and an achievable activity.
- Train and educate for caregivers and respite care workers about skills, self-care and knowledge of resources. Also training for 2-1-1 operators and emergency personnel.

Additional Recommendations

- Encourage faith communities to help their members with IADLs.
- Build neighborhood capacity to provide services for people with IADLs in the neighborhood.
- Increase public awareness and community education about availability of resources to help people with ADLs and IADLs.
- Provide mobility counseling/education to direct seniors to appropriate transportation options and how to access them; and the development of appropriate options that will decrease the need for relocation due to inability to drive.

Next Steps

The survey data and recommendations outlined in this *Report to the Community* provide a starting point and framework from which to work. Service providers, policymakers, private and public funders and community advocates in Orange County can draw on the results to shape priorities that address older citizens' greatest needs and strengthen programs that encourage independence, vitality and community engagement.

The next steps in the process include:

- Review of the recommendations and strategies;
- Set priorities;
- Determine an investment plan;
- Fund initiatives;
- Implement the plans; and
- Evaluate effectiveness of actions taken.

In October 2003, the Orange County Commission on Aging began the development of its strategic plan for the next several years. The four domains of elder health and well-being, as well as the results of the local AdvantAge study, are being used as tools to help establish the future direction of the Commission. As the strategic plan is developed and the community is convened to begin implementation, the four domains of elder health and well-being can serve as a useful resource for evaluating the impact of the Commission's initiatives.

The Community Partnership Committee of the Orange County Commission on Aging is utilizing the AdvantAge domains and indicators as a framework for identifying and mapping services currently available in Orange County.

The Orlando Mayor's Committee on Aging supports the AdvantAge framework for creating "Our Community for Lifetime," and the survey results and recommendations will help guide their efforts.

A supporting project close to completion is an in-depth study of Meaningful Service and Employment, commissioned by the Winter Park Health Foundation and conducted by the Heart of Florida United Way and the University of Central Florida. This study will include recommended action steps for the community.

Finally, and of critical importance, the Delta Leadership Council, a local group of public and private funders, is committed to playing a key role in funding, implementation and evaluation processes related to the AdvantAge recommendations.

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WINTER PARK
 HEALTH FOUNDATION

The Winter Park Health Foundation is a not-for-profit organization whose mission is to make a positive difference in people's lives by creating the healthiest community in the United States.

As the catalyst and sponsor for the Orange County, Florida AdvantAge Initiative, the organization's trustees, staff and community advisors will rely on the results of this comprehensive study to help direct the Foundation's investments in programs and services serving the needs of older adults and their families. In addition, the information gained will be helpful as the Foundation works with others convening stakeholders to better understand and plan for the various challenges impacting older adults in our community.

The Foundation also invests in strategic partnerships to address the major health and wellness issues of youth as well as residents of all ages who do not have appropriate access to healthcare. In addition, the Foundation provides ongoing support to Winter Park Memorial Hospital enhancing its provision of innovative, high-quality care to patients.

To learn more about the Winter Park Health Foundation, please visit www.wphf.org or call 407/644-2300. For information concerning Foundation initiatives and services related to older adults, contact Paulette Geller, Program Director – Older Adults, at pgeller@wphf.org.

For More Information

Orange County Commission on Aging (OCCOA)

Supported through the Orange County Office on Aging, the vision of the OCCOA is for an elder-friendly community that empowers older adults through choices that allow them to support and maintain their independence within their home community. Its purpose is to identify the needs of the senior population and find ways to help by working cooperatively.

www.orangecountyfl.net/dept/hfs/aging_office/

Phone: 407-836-7616

Email: OfficeonAging@ocfl.net

DELTA Leadership Council

The DELTA Leadership Council, a group of local funders that has as its mission – to develop and sustain a responsive, accessible system that provides opportunities for older persons throughout our communities to maintain dignity, independence and health. To learn more about DELTA, contact the Senior Resource Alliance.

www.senioresourcealliance.org

Phone: 407-228-1800

Email: beachd@elderaffairs.org

Senior Resource Alliance (SRA)

SRA is the area agency on aging whose mission is to provide leadership, advocacy, information and the development of resources in Orange, Osceola, Seminole and Brevard counties. The SRA also provides support for the work of the DELTA Leadership Council.

www.senioresourcealliance.org

Phone: 407-228-1800

Email: beachd@elderaffairs.org

Orlando Mayor's Committee on Aging

Formed to advise and communicate to the Mayor issues of importance to seniors living in the Greater Orlando area, this group makes recommendations to

the Mayor on specific City of Orlando policies and programs of benefit to seniors. It also works to raise public awareness of senior's needs and issues.

www.cityoforlando.net

Phone: 407-246-3094

Email: kathleen.russell@cityoforlando.net

Florida Department of Elder Affairs (DOEA) – Communities for a Lifetime

Communities for a Lifetime is Governor Jeb Bush's statewide initiative that assists Florida cities, towns and counties in planning and implementing improvements that benefit the lives of all their residents, youthful or senior. This initiative recognizes the diverse needs of residents and the unique contributions individuals can make to their communities. Participating Communities for a Lifetime use existing resources and state technical assistance to make crucial civic improvements in such areas as housing, health care, transportation, accessibility, business partnerships, community education, efficient use of natural resources, volunteer opportunities, and recreation.

www.elderaffairs.state.fl.us/does/english/communities.html

Phone: 850-414-2000.

Email: CFAL@elderaffairs.org

University of Central Florida

Access to complete Orange County, Florida AdvantAge Survey data is available as a community service of the University of Central Florida.

Access to Better Community Data

(to view survey results)

www.library.ucf.edu/abcd

Email: abcd@mail.ucf.edu

Center for Community Partnerships

(for assistance with data analysis)

www.centralfloridapartnershipcenter.org

Phone: 407-823-4579

National AdvantAge Initiative

The national AdvantAge Initiative helps counties, cities and towns prepare for the growing number of older adults who are "aging in place" while creating livable communities for people of all ages. Across the country, the AdvantAge Initiative is working with communities to measure and improve their elder friendliness.

www.advantageinitiative.org

Phone: 212-794-6300

Email: mia.oberlink@vnsny.org

Winter Park Health Foundation (WPHF)

The Winter Park Health Foundation is a not-for-profit organization whose mission is to make a positive difference in people's lives by creating the healthiest community in the United States. As the sponsor of the Orange County AdvantAge Initiative, WPHF is furthering its work in identifying and addressing the needs of older adults. Additionally, WPHF focuses its efforts on initiatives to support the uninsured and youth, as well as a long-standing interest in services provided through Winter Park Memorial Hospital.

www.wphf.org

Phone: 407-644-2300

Email: pgeller@wphf.org

We are grateful to the Senior Resource Alliance for its generous contribution toward the publication of this *Report to the Community*.

–AdvantAge Steering Committee
