

**Alexandria Commission on Aging Minutes  
January 14, 2016**

**Members Present:** Carol Downs, Bob Eiffert , Jane King, Mary Lee Anderson, Charles Bailey, Sharon Dantzig, Alan Dinsmore, Joan Dodaro, Cedar Dvorin, Christine Fulgencio, Anestacia Graham, David Kaplan, Pat Killeen, Michael Kreps, Jim Lindsay, Jan Macidull, Mary Parker, Del Pepper, Barbara Waters

**Members Unexcused:** Elisabeth Palmer Johnson

**Liaisons Present:** Kathryn Toohey, St. Martins Senior Center; Margaret Orlando, Recreation, Parks and Cultural Activities; Mitch Opalski, Arlington Commission on Aging; Ian Torrance, Police Department

**Staff Members Present:** Terri Lynch, Debbie Ludington and JoAnn Callender, Division of Aging and Adult Services

**Guests Present:** Lori Young, Goodwin House; Ann Armstrong

**The meeting was called to order at 4:05 p.m.**

**Minutes of the December 10, 2015 approved.**

**Introduction of new member:** Sharon Dantzig was welcomed.

**Presentation on Medicaid:** See attachments: Terri Lynch and JoAnn Callender reported on Medicaid, Virginia is at 50 – 50 federal/state match because it is a fairly wealthy state. Medicaid Expansion would have covered up to 138 percent of federal poverty level. JoAnn reported on the Elderly and Disabled Consumer-Directed Waiver. Income must be less than \$2,163, assets less than \$2,000. The waiver services are free if income is not above \$9,000 a year. Income of \$2163 qualifies for spend down. Agencies don't like spend down policies as some can't pay copay. The waiver only provides 56 hours a week of care. There must be a plan for additional care and someone must be able to direct care. DAAS does not have the information on number of waiver recipients at subsidized independent living facilities.

There is currently no waiting list. DAAS is usually able to have screening start within a week. The state is pushing a 30-day limit on time taken to complete screens. 87 percent of those screened outside of the hospital, 87 percent screened in hospitals go to nursing homes.

Most older people don't understand Medicaid and the qualifications for it. It is possible to spend down completely to be eligible and there is a spousal allowance. A spouse can keep the house, a car and part of income. Medicaid has 45 days to decide on a case. DAAS can do 25 screens a month and the number has been going up steadily.

DAAS does presentations on Medicaid eligibility. Elder law attorneys also make presentations on this.

AARP will be Doing Prepare to Care and some of the DAAS information will be useful.

Jan noted that it would be good to have readily accessible video about Medicaid and related issues on a website. Learning styles vary for adults. n4a has relevant information on its site. Some residents may qualify who do not know about Medicaid and the ECDC program. Those getting rent relief might qualify.

**Executive Committee Report:** Carol noted the change in the executive committee report that substitutes a meeting in Loudoun County about the community ambassador program in lieu of a staff person from the Loudoun County AAA presenting to the Commission.

**Alexandria Police Department:** Jan thanked Ian Torrance for helping her with identity theft that occurred with PayPal account only used once. Other frauds were mentioned such as calls claiming to be the IRS, the email that help is needed from someone overseas. Ian stressed the need to use a credit card rather than a debit card for purchases.

**Bylaws change proposed:** The executive committee moved that the quorum requirement in the bylaws be amended to state that, "The quorum for each meeting of the Commission shall be a simple majority of the currently appointed membership." It replaces the former quorum requirement that, "The quorum for each meeting of the Commission shall be not fewer than 11 members." The amendment was adopted unanimously. Commissioners asked for copy of the bylaws. Debbie will update them and send them to all.

**FOIA Regulations** – As COA members, emails we send are public information. Jan noted that we need Commission on Aging approval if we are representing a Commission position. We also cannot invite COA members to partisan political events. An example was the Ramsey Homes meeting last night which enabled three COA members to gather information but not express a position as the COA has not taken one.

**Arlington Commission on Aging:** Mitch Opalski, Chair of the Arlington Commission on Aging, said that Arlington projects a \$3,000,000 shortfall, as home values are going up. Arlington COA is looking into emergency preparedness, will reach out to Alexandria COA.

**Division of Aging and Adult Services:** Terri announced that DAAS has two new staff. Larry Berman is the replacement for Cedar Dvorin as the VICAP Coordinator and the new social worker is Mr. Kim. The announcement to fill Terah's position will take place soon. The DCHS 2015 Community Impact Report was distributed. The full report is available at <http://www.alexandriava.gov/DCHS>

**Human Rights Commission:** The Commission has been discussing change of street names. A member of the Human Rights Commission is on the advisory commission that will recommend any changes to streets and statues that were named to honor the Confederacy.

**AARP:** At the opening session of General Assembly, AARP volunteers sought many co-patrons for Long-Term Care Ombudsman Budget Amendment and Respite Care Budget Amendment. See attachments

**Virginia Hospital Center** – Information was distributed about the opening of a new Physicians Group in Old Town Alexandria at 700 S. Washington St., Suite 330, Alexandria, VA 22314. 703-528-8260. They are accepting new patients as well as Medicare.

**Partnership for a Healthier Alexandria:** Carol will be meeting with the Partnership on its aging in place priority.

**Commission on Persons with Disabilities:** The Red Cross disaster program specialist spoke to the Commission on Persons with Disabilities on the possibility of Red Cross working with Meals on Wheels to provide information on emergency services and resources available during disasters. The COA's emergency preparedness work with Arlington COA relevant and Mary Lee will follow up with Mary Parker.

Mary Parker noted that Arlington is reviewing distribution of housing vouchers, which ARHA manages in Alexandria. We could have a speaker from the Endependence Center. The Chamber of Commerce is participating in the ACPD awards program by honoring businesses that hire persons with disabilities and/or accommodate disabilities of customers. Tom Sachs and wife have donated \$25,000 to scholarship fund. Scholarships go to high school students with disabilities for college.

**Economic Development Committee:** Mary Lee noted that the grocery delivery program now includes both Harris Teeter and Giant. SSA needs more volunteers for the program.

**Housing Committee:** See attachments. The educational fact sheet of Northern Virginia Affordable Housing Alliance was distributed. The community meeting on Ramsey House was discussed. The revised proposal from ARHA was presented. It is proposing two buildings with 53 units--more than on the site now. Split levels of those whose incomes are up to 60 percent AMI would be eligible. People there now would have to reapply. ARHA did a lot of home work. Many attended from the neighborhood and concerns remain about preserving the historic character. Ramsey House was the first housing for black military. Economics are the driver, and HUD cannot provide a museum. ARHA must apply by March 6, otherwise a year wait. The roof top will be used for activities. Concerns of individual families were heard respectfully. A person who lives there commented on bad condition of her own unit now. Lack of keeping up ARHA buildings explained as a problem with funding maintenance. The question was raised about upkeep of new buildings. Even renovation of Ramsey House would not bring current units up to standards. Density issue raised. Developers are interested in tax benefits. Six units would be accessible. VDHA claimed that the cost of Universal Design is too high. The Commission needs to look into this. Green Earth will certify rather than LEED. Bricks are proposed for sidewalks in plans for Ramsey House.

The Commission worked with the Department of Transportation and Environmental Services and the Department of Planning and Zoning, both of which agreed to curtail the use of bricks in new developments. Bob moved that Jan draft a letter to both departments to be signed by Carol. The motion was seconded. The letter will express the Commission's objection to the use of brick around Ramsey House. Carol will send the letter to Carl Moritz, Helen McIlvaine, Hillary Orr, and Yon Lambert. The motion was approved unanimously.

**Advocacy Committee:** Advocacy with the General Assembly continues by NVAN. Bob noted that there may be an urgent need for advocacy on the city budget.

**Communications Committee:** The committee is still working to meet with staff on website, which is always under continuous review.

**Economic Development Committee:** Mary Lee showed the Silver Service discount cards that will be used by older Alexandrians to obtain discounts. Ten businesses are already in the program and there are more to come through the Del Ray Business Association. Pat Miller and Mary Lee communicated several times with businesses to obtain their agreement.

**Diversity Committee:** See attachment Report was distributed. The next meeting is on January 25 at 5:30.

**New Business:** Virginia Organizing is planning a meeting with Virginia's insurance commissioner to discuss plans by Aetna and Humana. The companies are discussing a merger. This could be a concern for the commission.

**The meeting ended at 6:05.**

## Important Information about the EDCD Waiver Program

### **What is the EDCD Waiver?**

The Elderly and Disabled Consumer Directed Waiver (EDCD) is a program administered by Department of Medical Assistance (Medicaid Services) that allows a person who is eligible for placement in a nursing home to receive care in the community.

### **What does the EDCD Waiver pay for?**

- Personal Care Aide Services
- Adult Day Health Care
- Medication Monitoring
- Respite Care
- Personal Emergency Response System (PERS)
- Program for the All Inclusive Care of the Elderly (PACE)
- Transition Coordination
- Transition Services

### **Who can request an EDCD Waiver Screening?**

The waiver program is open to everyone but is used by older adults and adults and children with disabilities.

### **How do I request a waiver screening?**

The process to apply for a screening is to call the Division of Aging and Adult Services intake line at (703) 746-5999 to make a referral for the screening.

### **Who conducts the screening?**

A public health nurse and Division of Aging and Adult Services family services worker will assess the person in their home or at a rehabilitation facility. Hospital staff can assess an admitted patient at the hospital.

### **What is the process to qualify for the EDCD Waiver?**

The process to obtain an EDCD waiver is a two part process.

- a. Part one is an assessment by a family services worker and a public health nurse to determine medical eligibility.
- b. Part two is the approval of Long Term Care Medicaid by the Eligibility Department

An individual must meet both these criteria before waiver services can be implemented

### **What are the criteria to qualify for the EDCD Waiver?**

Completion of the Uniform Assessment Instrument (UAI). This is Virginia's screening tool for all facility and community services. This assessment must show:

- a. Inability to complete activities of daily living tasks
- b. A medical nursing need
- c. Demonstration of At-risk criteria

**Who is a good candidate for waiver services?**

- a. Individuals who are dependent in life skills such as bathing, dressing, toileting, eating, mobility, and orientation.
- b. Individuals who have a medical nursing need (tasks that require nurse or trained medical professional: oxygen, injections, feeding tubes, injected medication)
- c. An individual who are likely to be institutionalized or placed out of the home if services are not implemented within 30 days.
- d. Individuals who can make safe plan of care that covers 24 hours
- e. Individuals who can direct their own care or have someone who can direct the care on their behalf.

**Why do adults get rejected from the waiver program?**

- a. Not enough physical limitations
- b. No medical nursing needs
- c. There is sufficient care already in place and the individual is not at risk of out of home placement.

**What can be done if the waiver is not approved?**

- a. Appeal to Department of Medical Assistance Services within 30 days of receiving denial notification

**How long is the process for the EDCD Waiver?**

The process to qualify for a waiver can take at least 60 days.

- a. Ten-14 days to complete the screening
- b. Department of Medical Assistance Services can take up to 45 days to make a decision on your Medicaid application

**Where can I get more information?**

The family services worker at the Division of Aging and Adult Services intake line at (703) 746-5999, can answer additional questions.

## MEDICAID

### GENERAL

- Enacted in 1965, same year as Medicare and the Older Americans Act
- Federal-state program; states administer program on day-to-day basis
  - ✓ Financial, state share based on state's wealth/poverty; state share ranges from 50% to 22%
  - ✓ Eligibility -- federal law requires states to cover certain population groups (mandatory eligibility groups) and gives them the flexibility to cover other population groups (optional eligibility groups). States set individual eligibility criteria within federal minimum standards.
    - Children
    - Pregnant women
    - Adults with disabilities
    - Older adults
- States establish an array of services that they will provide

### WHEN DOES VIRGINIA MEDICAID PAY FOR LONG-TERM CARE?<sup>1</sup>

#### MEDICAID COVERED GROUPS

There are many Medicaid covered groups. Most older Medicaid applicants must fit within one of the groups below to be eligible. However, this is **not** an exclusive list.

- **SSI -- Supplemental Security Income** recipients.
- **Aged and disabled** Virginians with income at or below 80% of the federal poverty line.
- Individuals receiving **long-term care** whose incomes are less than 300% of the SSI level: nursing home or Elderly and Disabled Consumer Direction, EDCCD, waiver service.
- **Auxiliary Grant recipients.** Aged, blind, or disabled individuals residing in Assisted Living Residences and receiving an auxiliary grant to help pay for their care.

**QMB – Qualified Medicare Beneficiary.** Limited Medicaid coverage is available to a Medicare recipient with income less than or equal to 100% of federal poverty income limits and limited assets. Medicaid will pay the Medicare premiums, deductibles, and co-payments but not long-term care, prescriptions, etc.

---

<sup>1</sup> Virginia Poverty Law Center, Kathy Pryor, Elder Law Attorney

**SLMB.** Medicare recipients with income over 100% but less than or equal to 120% of federal poverty income limits are eligible for SLMB. Medicaid will pay only the Medicare premium, but not the co-payments or deductibles.

**QI.** Medicare recipients with income over 120% but less than or equal to 135% of federal poverty income limits. Same coverage as SLMB except that application must be made every year and it will be first-come, first-served, until the money runs out.

***Medically Needy***

- The applicant is aged, blind or disabled; and
- Resources are below the SSI limit, but income is more than 80% of the federal poverty line; and
- After deducting medical expenses incurred (but not necessarily paid), income is below the medically needy income limit. This is called an income spend-down.
- Usually, individuals will not qualify under this category unless they are receiving long-term care or have large unpaid medical bills.

**VIRGINIA MEDICAID COVERAGE OF LONG-TERM CARE  
PRE-ADMISSION SCREENING**

Unless a nursing home stay is expected to last less than 30 days, applicants seeking Medicaid coverage of either community based care or nursing home care generally must be screened by a team to make sure they qualify functionally and medically for long-term care in addition to meeting income and resource eligibility.

A person seeking a community based care waiver must meet the same criteria as a person seeking coverage of nursing home care. Available services include

- ✓ Personal Care, including assistance with bathing, dressing
- ✓ Adult Day Health Care
- ✓ Respite care (480 hours per fiscal year)
- ✓ Medication Monitoring
- ✓ Personal emergency response system
- ✓ PACE [Program of all Inclusive Care for the Elderly] for people also enrolled in Medicare

To qualify, the person must be dependent in a number of activities of daily living (which include bathing, dressing, eating, toileting, transferring, bowel and bladder function). The team will also assess the individual's mental orientation and behavior (e.g., whether the person wanders or is disoriented), mobility, joint motion, and ability to self-administer medications. The person's medical and nursing needs, including the need for medical or nursing services, observation or monitoring, potential for medical instability, etc. will also be evaluated.

Team consisting of social worker and nurse conduct community based assessments. Physician in local health department reviews the assessment. Local hospital staff performs assessments when patient is in the hospital.

UAI -- Uniform Assessment Instrument is used for the assessment.

## **INCOME ELIGIBILITY FOR MEDICAID COVERAGE OF LONG-TERM CARE**

### **➤ Individual applicant for long-term care:**

- An applicant for long-term care is eligible if income is less than 300% of the SSI limit (\$2,199 per month in 2015). There is a co-pay obligation that is computed based on the person's actual income.
- If her income exceeds the limit indicated in the above paragraph, she must qualify on an income spend-down.
- A nursing home resident generally must pay all of her income toward the nursing home bill except \$40 per month. If the person is expected to return to her home in the community within six months and is responsible for shelter costs, she is entitled to a home maintenance deduction equal to the monthly medically needy income limit (between \$310.27 and \$465.40/month depending on the jurisdiction), to pay the mortgage or rent.
- A community-based care [CBC] recipient on the Elderly and Disabled waiver may keep \$1,209 per month in 2015 for his personal needs. The personal needs allowance changes annually and is calculated at 165% of the SSI level.
- Both nursing home residents and CBC recipients may also pay some medical insurance premiums and other medical expenses before contributing the rest of their income for the cost of the long-term care.

## Income and Asset Guidelines for Benefits Programs

PROGRAM	GROSS MONTHLY INCOME		ASSETS	
	1 person	2 person		
<b>Auxiliary Grant</b> [12-17-15]	No Va: \$1,484; \$1,402 to provider	N/A	\$2,000 Monthly Personal Needs Allowance: \$82	
<b>Dental Clinic</b> [09-03-15]	\$1,962	\$2,655	\$2,000	
<b>SNAP</b> [09-14-2015]	\$1,265	\$1,705	\$3,250 for households with a member age 60 and over	
<b>Fuel Assistance</b> [09-14-2015]	\$1,265	\$1,705	No limit	
<b>Rent Relief</b> [9-14-15]	\$2,138 +\$625 disregard	\$2,138 +\$625 disregard	\$75,000	
<b>SSI</b> [1-1-16]	\$733	\$1,100	\$2,000	\$3,000
<b>Full Medicaid</b> (80% of Fed'l Poverty)	\$785	\$1,062	\$2,000	\$3,000 Burial set-aside: \$3500/hshld mbr. Irrevocable burial trust- no limit
<b>QMB {Medicaid}</b> [2-19-15]	\$981 +\$20 income disregard	\$1,328 +\$20 income disregard	1 person \$7,280	2 person \$10,930
<b>SLMB {Medicaid}</b> [2-19-15]	\$1,177 +\$20 income disregard	\$1,593 +\$20 income disregard	1 person \$7,280	2 person \$10,930
<b>QI {Medicaid}</b> [2-19-15]	\$1,324 +\$20 income disregard	\$1,792 +\$20 income disregard	1 person \$7,280	2 person \$10,930
<b>Extra Help {Part D LIS}</b> [2-19-15]	\$1,471	\$1,991	\$13,440	\$26,860
<b>Community Based Care {Medicaid Waiver}</b> [2-19-15]	\$2,199		\$2,000 Burial set-aside-\$3500/hshld mbr Irrevocable burial trust-no limit	
<b>Real Estate Tax Relief Annual Filing Deadline April 15</b>	up to \$40,000 for full exemption \$55,000 for 50% exemption \$72,000 for 25% exemption	Same as 1 person	Assets no greater than \$430K, excluding value of primary residence	
	up to \$72,000 for tax deferral	Same as 1 person	Assets no greater than \$430K, excluding value of primary residence	
<b>Section 8 Housing</b> [3/18/15]	\$3,188	\$3,642		



707 E. Main Street, #910 | Richmond, VA 23219  
1-866-542-8164 | Fax: 804-819-1923 | TTY: 1-877-434-7598  
aarp.org/va | aarpva@aarp.org | twitter: @AARPVa  
facebook.com/AARPVirginia

January 13, 2016

Dear Distinguished Members of the Virginia General Assembly:

On behalf of more than 1 million AARP members in Virginia, we welcome you to the 2016 General Assembly Session and look forward to working with you.

Our advocacy agenda for the 2016 General Assembly focuses on areas that are important to Virginians 50+ and their families including:

- Ensure Advanced Practice Registered Nurses have full practice authority.
- Ensure the state Long-Term Care Ombudsman Program is funded to meet its mandate of 1 ombudsman per 2000 long-term care beds.
- Enhance the Department for Aging and Rehabilitative Services' Lifespan Respite Care Voucher Program to annually serve an additional 250 families.
- Ensure that Adult Protective Services provides law enforcement a report with all relevant documentation of adult financial exploitation they suspect to be \$50,000 or greater.

In addition, we will monitor budget proposals and other legislation throughout the General Assembly to be sure that decisions are fair to all generations and do not place unnecessary hardship on vulnerable Virginians.

David DeBiasi is our State Advocacy Director. Please feel free to contact David at 804-344-3059 or ddebiasi@aarp.org if you have questions about AARP's legislative priorities. We look forward to working with you during this session.

Sincerely,

**AARP Virginia State Advocacy Team**

Doris Bey  
Dena Bost  
Lorraine Bratton  
Steve Brundage  
Val Coluni  
Alan Corbett  
Peggy Friedenberg

Altamese Johnson  
Pat Killeen  
Jane King  
Bill Lukhard  
Steve Morrison  
Hamda O'Brien  
Bob Sargeant

Frank Scopelliti  
Maudie Scott  
Bruce Smith  
Warren Stewart  
Neil P. Walsh  
Vernon Wildy

## 2016 Legislative Priorities

### **Advanced Practice Registered Nurses' Practice Authority**

Nurses are lifesavers not only for patients but for many family caregivers. AARP Virginia is seeking to break down barriers that prevent advanced practice registered nurses (APRNs), such as Nurse Practitioners, from using all their training and skills to care for patients. Virginia is one of the more restrictive states in terms of patient access to these practitioners. Easing the restraints on APRNs' practice authority is especially relevant to older adults who live in medically underserved areas or continue to live independently by receiving care at home.

### **Long-Term Care Ombudsmen**

Many long-term care recipients are medically or emotionally too frail to speak up for themselves. AARP Virginia believes the state Long-Term Care Ombudsman Program, which acts as the voice for these individuals to resolve care problems, should be fully funded to meet the minimum staffing ratio set by the General Assembly as one ombudsman to every 2000 long-term care beds.

### **Respite Care**

Respite care offers short-term help to give family caregivers a break from the stress of providing care. It is vital to helping caregivers maintain their health and makes it easier for families to care for their loved ones in their own homes, as opposed to long-term care facilities. AARP Virginia urges lawmakers to increase funding for the state Lifespan Respite Care Voucher Program to annually serve an additional 250 families in need.

### **Financial Exploitation of the Elderly HB 248 (Minchew), HB 291 (Herring), SB 249 (Black)**

Thousands of older Virginians are exploited - often by persons in a position of trust - for their money and other financial assets. Stronger reporting laws are needed to increase prosecution of perpetrators. AARP Virginia supports requiring the Division of Adult Protective Services to report to law enforcement any adult financial exploitation they suspect to be \$50,000 or greater.

### **Ensure Budget Cuts Don't Hurt Vulnerable Virginians**

We will monitor budget proposals to be sure that decisions are fair to all generations and do not place an unnecessary hardship on our most vulnerable citizens.

For more information, contact David DeBiasi at [ddebiasi@aarp.org](mailto:ddebiasi@aarp.org) or (804) 344-3059.

# **DARS Lifespan Respite Voucher Program**

*Increase funding to serve an additional 250 families per year*

## **Support Family Caregivers**

Since 2011, Virginia has operated the Department for Aging and Rehabilitative Services (DARS) Lifespan Respite Voucher Program to provide desperately needed respite care for the primary family caregiver who is a co-resident with a disabled family member. It provides reimbursement of up to \$400 per year per family to cover the cost of temporary and short-term respite.

## **Save Taxpayer Dollars**

Respite care makes it easier for families to care for their loved ones in their own homes, as opposed to expensive long-term care facilities which often become the burden of taxpayers. Family caregivers in Virginia provide some 956 million hours of care each year to persons with limitations in daily activities. This unpaid care translates into an annual economic value of \$11.8 billion in Virginia.

## **DARS Lifespan Respite Voucher Program**

- Serves approximately 200 families annually
- Individuals receiving care:
  - ranged from 1 to 102 years old.
  - lived in 150 cities and towns across the state.
- Applicants reported 80 different disabilities and health-related issues.

## **State Funding Request**

- \$100,000 for FY 2017
- \$100,000 for FY 2018

***Budget amendments sponsored by Delegate Peace and Senator Favola will allow the Lifespan Respite Program to serve an additional 250 families annually.***

### **For further information contact:**

Ashley Kenneth, National MS Society, 804-591-3048, [Ashley.Kenneth@nmss.org](mailto:Ashley.Kenneth@nmss.org) or  
David DeBiasi, RN, AARP Virginia, 804-344-3059 [ddebiasi@aarp.org](mailto:ddebiasi@aarp.org)

Supported by AARP Virginia as a member of the Virginia Caregiver Coalition and the Virginia Elder Rights Coalition

# Fully Fund the State

## Long-Term Care Ombudsman Program

**Appropriate \$2.01 million to meet the Virginia standard (*Code* § 51.5-135) of one full-time Ombudsman for every 2,000 nursing home and assisted living beds.**

### Protect vulnerable long-term care recipients

Many long-term care recipients are medically or emotionally too frail to speak up for themselves. The state Long-Term Care Ombudsman Program acts as the voice for these individuals to resolve care problems. Individuals who are denied care often experience preventable complications and hospitalizations, costing taxpayers countless dollars. Early intervention by an ombudsman can save money and prevent harm.

### Address chronic staff shortages

- Most ombudsmen are overwhelmed with requests and cannot always respond in a timely or complete manner.
- Virginia localities have coverage as low as one ombudsman to every 5,000 beds.
- Staff shortages are further exacerbated by:
  - increased complexity of individual cases,
  - a rising number of older adults and persons with disabilities in need of services,
  - an expanded mandate to include community-based care.

### Meet the Virginia standard

The Virginia standard set by the General Assembly (*Code* § 51.5-135) calls for one full-time Ombudsman for every 2,000 nursing home and assisted living beds.

- 68,970 nursing home and assisted living beds are within the Program's purview.
- 34.5 full-time local ombudsmen are required to achieve the 1:2000 ratio.
- Four state-level FTE are needed to provide guidance, training, and technical assistance to the local ombudsmen in facilities and community-based settings.

At a rate of \$75,000/needed FTE, the total Program cost is \$2,886,375. Currently, \$873,730 (30%) is available, leaving the program underfunded by \$2,012,645 (70%).

**Fully fund the state Program to meet the Virginia standard of one ombudsman to every 2,000 nursing home and assisted living beds.**

For further information contact Kathy Pryor, [Kathy@vplc.org](mailto:Kathy@vplc.org), 804-782-9430 Ext. 14 or David DeBiasi, RN, [ddebiasi@aarp.org](mailto:ddebiasi@aarp.org), 804-344-3059

*Supported by AARP Virginia as a member of the Northern Virginia Aging Network and the Virginia Elder Rights Coalition*

**COMMISSION ON AGING**  
**Housing Committee Report**  
**December 2015**

**Contents**

- Upcoming Meetings
- 2015-16 Priorities (for COA Actions)
- December meeting notes – Services available to subsidized housing residents that help them age in place; Old Town North Small Area Plan.
- Other Meetings Attended – Atlantic Conference on Affordable Housing, State Housing Conference
- Justin Wilson’s January 1 article on Affordable Housing

**Upcoming Meetings**

January 11 – Overview of Beasley Square Senior Independent Living, by current manager, arranged by Bill Harris.

TBD – ARHA update, by current president. (Who to make the ask?)

TBD – Presentations by and discussions with Arlington and Fairfax Housing, re senior housing, affordable housing and assisted living. (Carol arranging.)

**2015-16 Priorities**

Draft priorities for 2015-16:

**GOAL ONE:** *proactively support the increase, on an annual basis, of Alexandria’s net stock of affordable housing and assisted living units by working with those groups and individuals that have major influence over the creation and demise of such housing in our community.* Specifically: local and state governmental bodies, developers, realtors, financing institutions, affordable and assisted living housing providers and advocates.

**GOAL TWO:** *Work with DAAS and others to educate residents and managers of Naturally Occuring Retirement Communities (NORCs) about public and private supportive services that be provided onsite, enabling them to live longer in their present homes.* Specifically, identify current NORCs in Alexandria, hold meetings with residents and managers in four with major providers of services.

**GOAL THREE:** *Work with key organizations and individuals to incorporate “housing for a lifetime” features in both new housing and redevelopment of*

**existing housing**, specifically: promote implementation of universal design and home visitability principles in new construction, expand “Home Fit” workshops and advocacy, and conduct meetings with City, developer and realtor communities to explain and demonstrate the economic value of housing for a lifetime.

**GOAL FOUR: Advocate for and track the impact of City Property Tax and Rent Relief Programs for Elderly and Disabled on these groups**, specifically, monitor impact of program changes on resident participation and advocate for changes, as indicated.

## December Meeting Notes

### 1. **Services available to Alexandria Residents who live in subsidized housing:**

Terri Lynch, Acting Director of DAAS, provided an overview. These services relieve pressure on the need for affordable assisted living by enabling people to receive services in their current place of residence. Categories include: In-home care, Adult Day Care, Transportation, Nutrition, Case Management and Counseling, Mental Health Counseling and Treatment, Emergency Alerts, Legal Services, Multi-cultural Services and Tenant-Landlord Office for Dispute Resolution.

Needed services for which COA support and education of policy makers include: Nursing Case Management (medical assessment, **medication set up**) and **Money Management**.

- Through Door program will end March 2016.
- Senior Taxi will spend all its 2015 funds.
- The COA Diversity Committee will be alerted to the Multi-cultural Services Program.
- Currently 55 people in City senior independent living facilities (Ladrey, Annie B. Rose, Claridge) are receiving home care services, 11% of their combined population. 23% of Ladrey’s residents receive home care services. Are residents of these facilities oriented to the availability of supportive in-home services when they move in as a healthy senior?
- Are there any studies comparing the costs of community based services in-home care with assisted living facility care?

Action: Need to explore how residents of senior independent living facilities learn about these services. Alert Diversity Committee to Multi-cultural DAAS services.

2. **Old Town North Small Area Plan:** Carol, Jane, and Jan met with Nancy Williams, lead P&Z Planner, for this new Small Area Planning Project. COA input on the SAP's eight areas of study are being collected by Carol to forward to Nancy prior to the SAP Committee's next meeting.
3. **Governor's Housing Conference:** Carol went to this state conference which was heavily attended by developers. Awards were given to several groups, including one for "livability." Considerable attention was given to rural services and services for vets. Helen McIlvaine presented the next day, along with Arlington, and Fairfax.

### **Other Meetings Attended**

**The Atlantic's Conference on Affordable Housing:** Bill, Bob, and Jan attended this conference, co-sponsored by AARP.

Housing challenges raised by HUD's Director:

- While the housing market is stronger, a rental affordability crisis exists around the country. There is no urban place where a minimum wage worker can rent a two bedroom apartment.
- This is compounded by a fast-growing, aging population. The millenials and the aging are vying for some of the same housing.
- Current housing tools are insufficient to these challenges.
- A new National Housing Trust Fund will place special focus on those whose incomes are under 30%.
- The Rental Assistance Housing Program demonstration of 2012 aimed to get the private sector involved in renovating public housing.
- HUD's role in shaping the housing market? Need help from FHA which continues to promote home ownership.
- Public housing in 28 communities will get broadband to "connect homes"
- "Opening Doors: provides a blueprint to end homelessness, starting with veterans. A 36% reduction has occurred since 2010.
- Institutionalized racism still exists. FHA is increasing its mortgage role with minorities. Needed: more focus on fair housing actions, also, policies to change this.
- "Show Me a Hero" is an HBO Series addressing housing issues. Lisa Belkin, Author, tracked 200 units of subsidized,

affordable housing built in Yonkers in a middle/upper class neighborhood, with positive results.

- People are spending much more on housing as a percent of their income. 44% of seniors pay over 30%.

#### AARP CEO

- AARP's focus: building "ageless, intergenerational communities:
- Has created a public database of community livability which includes focus on housing, access to health care.
- Conducting "Redefining Home Contest" with Wells Fargo and HDT, to identify new architectural design and rehabilitation approaches that meet the needs of 50+ population, to be used in affordable demo houses.
- Also conducting a \$50K challenge for innovative solutions to age in place in your own home.
- The 50+ population annually generates \$7 trillion, the third largest economy in the world.
- New book by Joanne Jenkins, CEO: **Disrupt Aging**, which challenges outdated beliefs about aging, personal development and issues, community and governmental roles
- Uber and Air B&B: their biggest customers and workers are seniors.
- 110M over age 50 in US. 2<sup>nd</sup> highest growth rate in a cohort: those over age 100.

#### United Health Care

- Their data shows 40% of health care cost causes are traceable to housing.
- Doing a 600 unit \$20 million housing demonstration in Detroit where client data will be tracked to assess the best mix of services to be provided in a one stop shop approach, where service integration is the focus.

#### Brookings:

- Believes older population will accept denser population.

#### AEI

- US has most affordable housing in the world for ownership.
- Reliance on federal government will reduce innovation due to aging entitlements and defense spending. Private sector will need to handle housing needs. Cities taking more responsibility. Churches have and are using land for affordable housing.

#### Montgomery Co. MD

- 14,000 units of affordable housing developed since 1974. 400 created/year. 10,000 for sale, 4,000 rental. The cost to the project is higher cost market rate housing.

- County has goal to put aside 12.5 % of units as affordable. “Affordable has become part of our culture—we embrace it.”

## Justin Wilson January 1 “Council Connection” Article on Affordable Housing

### Housing Affordability, Are We The Problem?

Despite being just a short trip across the Potomac River, it's rare to see Federal policymakers directly engaged in the day to day challenges that face us in local government.

In late November, [Jason Furman, the Chairman of the Council of Economic Advisers](#), made a speech that drew a direct connection between one of the most challenging issues for us in Alexandria, to one of the most challenging issues facing our nation.

In doing so, he laid the blame for these challenges squarely at the feet of local policymakers.

[In this speech, Mr. Furman addressed the large and growing challenges of housing affordability in communities. He connected those challenges with growing income inequality around our country.](#) But most relevant to us in Alexandria, he assigned blame for a lack of housing affordability on local zoning restrictions.

Said another way, our limitations and restrictions on development have driven the cost of housing to unaffordable levels, thus exacerbating income inequality. [He even traces the impact of these restrictions to reductions in employment.](#)

Furman writes "Zoning restrictions--be they in the form of minimum lot sizes, off-street parking requirements, height limits, prohibitions on multifamily housing, or lengthy permitting processes--are supply constraints. Basic economic theory predicts--and many empirical studies confirm--that housing markets in which supply cannot keep up with demand will see housing prices rise."

Some have even [suggested that removal of some local authority over land use can help address the affordability issue.](#)

All this leads us to the fundamental question about whether Alexandria's efforts to address affordability are helping, hurting or having no effect.

Up until now, our discussions on affordable housing have focused [on funding questions, debates about the impacts of individual projects, and the contention between affordability and other City priorities.](#) We adopted the [Housing Master Plan](#), which gave the community a series of tools with which to tackle the challenges of affordability.

Yet, if Furman and other economists are to be believed, we in Alexandria have never tackled the fundamental root of housing affordability. Most of our efforts are aimed at creating or preserving housing that will ultimately be in the public domain or under nominal public control. However, it is through our zoning authority that we can truly impact housing affordability in privately owned housing.

Obviously zoning restrictions have a place and serve a need for our community. I would also suggest that we have done some things right.

[Last year, the City Council adopted new parking standards for multi-family housing.](#) By rightsizing parking, we significantly reduced the cost of construction for multi-family residential development, provided new incentives for the use of transit, and freed up resources for alternate community investments.

However, these new standards went even farther, by providing steeper parking incentives for restricted affordable housing units. [In doing so, the City essentially adopted our largest financial incentive for the creation of new affordable housing,](#) while also reducing the overall cost of private housing development.

The City has aggressively utilized our land-use authority to

- limit density

- increase open space
- create new retail
- improve architecture
- improve transportation infrastructure
- preserve historic structures
- develop new public facilities
- create affordable housing
- improve basic infrastructure
- improve public art
- and more

At some point, the question becomes whether those efforts are ultimately self-defeating; particularly as it relates to housing affordability?

My view is that we must first comprehensively inventory and assess the City's land use requirements. Once we understand the full scope and cost of the City's requirements, we can appropriately prioritize the impact moving forward.

As we work to implement the City's Housing Master Plan, we must comprehend all of the factors that challenge affordability in the City. [Let me know your thoughts!](#)

### **Fire Station 210 Fully Staffed**

A decade ago, a [needs assessment indicated that longer emergency response times](#) necessitated a new fire station on the West End of our City. With reconfiguration of the City's impound lot, plans advanced to build a new fire station, numbered 210, on Eisenhower Avenue.

The Council identified \$16 million of capital funds to construct the new station and in Fiscal Year 2011, a contract was issued for construction of a new station with new training facilities.

In the fall of 2013, with the station nearing completion, the City applied for a Federal grant under the "[Staffing for Adequate Fire and Emergency Response](#)" (SAFER) program. The City had previously used SAFER to expand our Fire Department staffing.

The grant covers the salaries and benefits for new firefighters. However, after two years, the recipient is required to pick up and maintain the expenditure, a so-called "Maintenance of Effort" provision.

In January 2014, the City was awarded a SAFER grant to cover the firefighters necessary to open Fire Station 210. At that time, the City Manager came to the Council indicating his decision to reject the grant due to the obligation of the "Maintenance of Effort" provisions, and the City's precarious long-term financial outlook.

Later that year, the City Manager provided a second recommendation for staffing the new Fire Station 210. In this proposal, he proposed moving the Peak Medic Unit and the fire engine at Fire Station 204 (Powhatan Street) to Fire Station 210.

Understandably, the neighbors of Fire Station 204 opposed the move, and the [uncertainty about the public safety effects caused Council to leave the fire engine in place](#). The medic unit did move and operated out of the newly opened Fire Station 210.

In rejecting the City Manager's recommendation, Council did give direction that the Fire Station 210 fire suppression staffing would be included in the FY 2016 budget when it was proposed.

In the fall of 2014, the City's then new Fire Chief [came to the Council with an entirely new model](#) for cross-trained firefighter/medics. With the versatility offered by this new model, the Fire Chief believed the plan would allow staffing of Fire Station 210 last year.

Unfortunately, higher than expected retirements and less medics opting for cross-training led to slower implementation of this plan. That created the unfortunate situation of [Fire Station 210 opening with no fire suppression services available](#).

In adopting last year's budget, the Council coalesced around a plan that provided [overhire funding to support the staffing of the engine at Fire Station 210](#).

[Last month on December 5th, the 24/7, four member Basic Life Support \(BLS\) engine company became operational at Fire Station 210](#). At the same time, the Fire Chief made the decision to move an EMS Supervisor with Advanced Life Support (ALS) capability to the station. The foam suppression unit, which has previously been stored at Fire Station 209 in Potomac Yard was now moved to Fire Station 210 to be closer to the Norfolk Southern ethanol transloading facility.

Based on analysis of the call volume since the medic unit was placed at Fire Station 210, the existing unit was also moved to Fire Station 203 on Cameron Mills Road, where it is most needed.

I am pleased that we now have the appropriate public safety capability in place at Fire Station 210, and I am confident that the men and women of the unit will protect the safety of their neighbors for years to come.

## **Data Drives Good Decisions**

Providing accountable results to the residents of Alexandria for their tax investment is an obligation of government. To support that accountability, government must have good data. We have now made another large step forward as we work to better collect more relevant data to measure how we provide City services.

[Nearly a decade ago, then City Manager Jim Hartmann introduced the Managing for Results Initiative, known as "MFRI."](#) MFRI categorized our City services into programs and activities that could be measured and reported. The budget format was then revised so that the proposed budget aligned expenditures to those programs and activities. This allowed the City to measure the performance and efficiency of services during the annual budget process.

The previous City Manager, Rashad Young then created the Office of Performance and Accountability (OPA). OPA was designed as an internal consultancy to implement performance improvement and efficiency throughout city government operations.

[We have now taken the next step, as OPA has unveiled the first draft of our regular Performance Reports](#). These reports cover each of the service areas of the City's Strategic Plan. They provide the performance and quality measures that are expected of City departments, while assisting the Council and City management to make good, data-driven decisions about those services.

[In addition, the Alexandria City Public Schools \(ACPS\) has unveiled a similar performance accountability system called iDashboard](#). ACPS provides a consolidated dashboard of its key performance indicators to allow parents and community members easy access to this data.

While identifying the metrics to measure the services we provide is an important innovation, we have a long way to go. We must improve the quality of our data, increase the frequency of when it is reported, and use the data to make better decisions about how we allocate resources. I look forward to continued progress in this area.

## **New Broadband Infrastructure for Our City**

In July, the City took a significant step forward in our efforts to bring new broadband options to Alexandria. As I wrote in May, the Council had supported the idea of issuing an Request for Information (RFI). This RFI would solicit concepts from the private sector for partnership with the City in expanding broadband options, availability, and capabilities.

In July, [the RFI was issued and we actively solicited those partnerships](#). The deadline for responses was September 3rd and we received 10 responses from potential private partners.

# Affordable Housing: It's About People



**The simple truth about affordable housing is that it's about the people, not the housing.** People of all ages and at all stages of life need a place to call home. They need housing that is safe, decent, and affordable. Here are stories about people in the City of Alexandria, and how the issue of housing affordability impacts their lives and their businesses.

**Housing affordability impacts employee recruitment and retention, especially for small businesses.**

**Peter and Bill finally secured a lease for their new cycling shop in the West End, and they are excited about the opportunities to grow this new business.** However, recruiting experienced staff is becoming a bigger challenge than they had anticipated. Steve is an excellent candidate for the position of head bike technician, but he currently lives in Winchester. Steve is willing to relocate to Alexandria, but with a starting salary in the high \$30,000s, Steve can't find an affordable place to live near the cycling shop, and he won't consider commuting from Winchester every day. Peter and Bill worry about staffing issues, and if they'll be able to recruit and retain quality employees given the cost of housing in the city.

**Life-long residents on a fixed income are unable to afford to stay in their hometown.**

**As a life-long resident of the city, Daisy grew up in what was known as "Colored Rosemont," a community of African American home owners, where neighbors knew each other intimately, a tightly knit village, if you will.** She attended school in the city and received her undergraduate degree at Virginia State University in Petersburg.

Daisy returned to Alexandria after graduation, and made a career working in businesses in the city as well as for city government. "I continue to live in Alexandria because it's home. I love the convenience of living in the metropolitan area, now referred to as the DMV. As I am nearing retirement, it is my plan to continue living in the city. However, the Alexandria I knew growing up is not the Alexandria of today. With the fast growing development and redevelopment happening in the city, and the extremely high costs of rent, mortgage and real estate taxes, I fear that I will not be able to stay here."

If Daisy retired today, it would be extremely difficult for her to stay here, as her retirement income won't keep pace with rising costs. "It is really disheartening to know that despite being a life-long resident, and contributing to the well-being of the City and its citizens, I am unable to continue to live my golden years here. I implore the powers that be to do a better job of ensuring that housing that is truly affordable become a reality and not an impossible dream."

---

*This information comes from **Housing Alexandria**, a public awareness campaign to share the community benefits of housing affordable to households with a variety of incomes. Affordable housing helps us retain the cultural and economic diversity that we value in our city and provides opportunities for those who work here or are life-long residents to continue to live here.*

**Our teachers and caregivers can't afford to live in the community where they work.**

**Paul and Beth have two children, a third grader and a fifth grader at Jefferson Houston School.**

Jason, the fifth grader, loves his teacher, Mrs. Harris. Paul and Beth are very impressed with her energy, enthusiasm and love of learning that she's cultivating in Jason. They look forward to the time when Elizabeth reaches fifth grade and has Ms. Harris as her teacher as well.

Ms. Harris lives in Manassas, and her commute makes for a very long day. She would like to live in the community where she teaches, but she and her husband can't find a home that they can afford, especially with the daycare costs for her daughter.

Ms. Harris hears about a new school opening in Prince William County, and applies for a teaching position there. She is willing to take a small pay cut because her commute is now only 20 minutes, and she has more time with her family. When Elizabeth starts fifth grade, Paul and Beth are very disappointed to learn that Mrs. Harris is no longer teaching in Alexandria.

**Alice's 84 year-old mother was not happy about moving from her life-long home into assisted living, but her transition was made easier by Sarah, the wonderful nurse's aide who works at the nursing home and helps care for her.** Sarah has worked at the nursing home for seven years, but commutes a long distance from her home in Fredericksburg because there are no affordable housing options for her in Alexandria.

A new seniors' facility has opened in Fredericksburg, and Sarah plans to apply for a job there. She loves her current job, and has grown very fond of the residents, but the commute adds almost three hours to her day, and she would like to live closer to where she works. Alice is concerned about her mother's response to getting used to a new caregiver, and she knows her mother will miss Sarah.

**No one who has served our country in the armed forces should experience homelessness.**

**Upon entry into New Hope Housing Alexandria Community Shelter in June 2015, Mr. Simms, a 57-year old Navy vet, said that he never thought he would be in the very place that he once transported others who had "fallen on hard times."** Mr. Simms' grandparents purchased a home in the City of Alexandria, and the home was willed to him after his parents passed away. However, Mr. Simms became one of the 11% of veterans who make up the adult homeless population.

A diagnosis of kidney disease in 2006 eventually led to loss of employment. Even though he received \$900/month in benefits, Mr. Simms could not afford to continue living in his Alexandria home. To make matters worse, Mr. Simms was swindled out of the proceeds of the sale of his family home by an unscrupulous relative.

Through collaboration between the City and two nonprofit organizations, Mr. Simms was offered a spot in a three-bedroom townhouse dedicated to serving homeless vets. He is now in a healthy, safe environment among his fellow veterans, and the City of Alexandria, through the Partnership to Prevent and End Homelessness, is caring for a man who fell on hard times, but served his country well.



[nvaha.org](http://nvaha.org)

# Affordable Housing



**Did you know that safe, decent housing that is affordable is the platform upon which individuals and families build stability and greater self-sufficiency?** Children do better in school, employers can more easily recruit and retain employees, and our community prospers when we have affordable housing choices for people who live and work in Alexandria!

## What is "affordable housing?"

Housing is affordable when housing costs do not exceed 30% of a household's gross monthly income according to the U.S. Department of Housing and Urban Development. If a larger percentage of your income is paid for housing, you may not have enough money for food, healthcare, child care and transportation costs. Over time, households might have to make choices on which costs to bear, and they could fall behind on their rent payments leading to possible eviction, or even homelessness.

*It is more cost effective to **prevent homelessness** than it is to serve those who are homeless.*

## Who needs housing that's affordable?

People of all ages and at all stages of life need housing that is affordable, including new graduates, young families, children aging out of foster care, low and middle income wage earners, seniors on fixed incomes, persons with disabilities, and more.

*Housing opportunities for people of all incomes and at all stages of life ensure that Alexandria remains culturally and economically diverse.*

## Why is this issue important for City government?

**Housing is critical to the economic and social well-being of our city.** The real estate market is not

producing the types of housing at the prices needed. Many people who work in Alexandria can't afford to live here, and many residents are being priced out of their neighborhoods, or are at risk of losing their homes due to escalating property values. As a result, over 84% of low or very low income renters in the City pay up to half of their income in rent.

*Currently, the average rent for a two-bedroom apartment is \$1,830.00 per month!*

## What can we do to address the unmet housing needs of so many Alexandria residents?

Housing is infrastructure, much like schools, transportation, fire and safety. City Council should provide the annual investments needed to develop safe, decent affordable housing, for this and future generations of Alexandrians.

## Why are housing costs such a burden for so many people?

There is a shortage of housing for the number of people who live in our region. Since 2000, a significant amount of our "market affordable" housing stock has been demolished or renovated, resulting in units with higher rents. Less than 10% of the new residential construction in Alexandria is affordable for residents and workers earning \$30,000, \$40,000 or even \$50,000 annually.

---

*This information comes from **Housing Alexandria**, a public awareness campaign to share the community benefits of housing affordable to households with a variety of incomes. Affordable housing helps us retain the cultural and economic diversity that we value in our city and provides opportunities for those who work here or are life-long residents to live here.*

*In the last decade, wages have remained flat or declined, but the cost of rental housing in Alexandria has increased by 30%.*

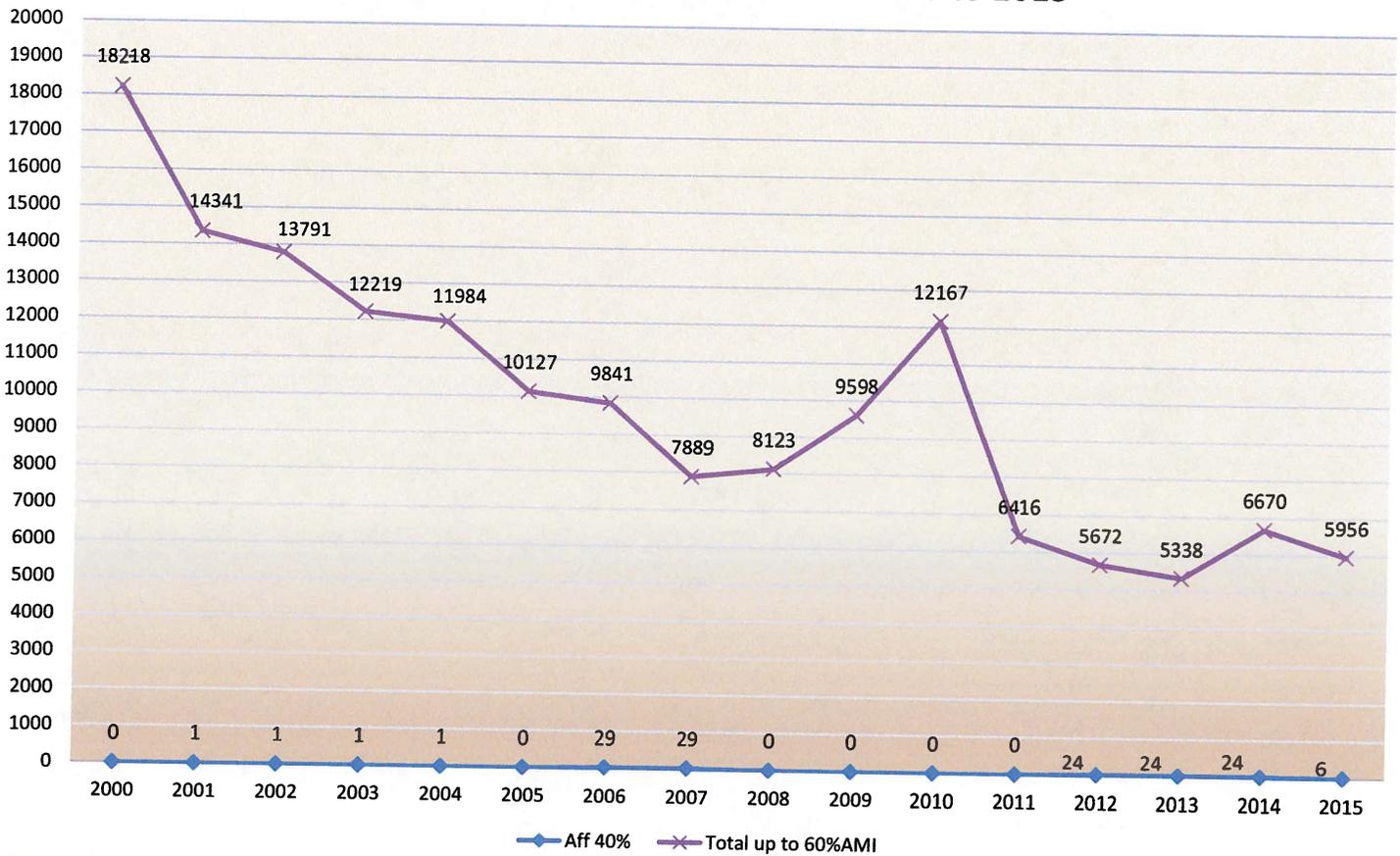
**What are "Market Affordable Rental Units?"**

They are older, smaller rental units with fewer amenities and rents that are more affordable than market-rate units. Market affordable units are usually privately owned and have no public subsidy as part of their financing. As a result, these units are not required to keep their rents low or to remain affordable.

Most of the market affordable housing in the region was built in the '50s and '60s to house the growing federal government workforce. Their location within the inner suburbs, near transit and employment centers, makes them a valuable asset to reposition through demolition or renovation with substantially higher rents.

The graph below represents the loss of these units in the City of Alexandria over the last 15 years. These units were home for most of the City's low and moderate income households.

**Market Affordable Rental Units 2000 to 2015**



Graph courtesy of the City of Alexandria Office of Housing



[nvaha.org](http://nvaha.org)

January 7, 2015

COA Diversity Committee Report

Committee members include: Co-Chairs, Anestacia Graham and Vanessa Greene, Reggie Banks, Jenny Chin, Alan Dinsmore, Carol Downs, Christine Fulgencio, and Jane King.

The Diversity Committee did not meet in December. The next meeting is scheduled for Monday, January 28 at 5:30 PM, place TBD.

Members of the Committee continue in their efforts on outreach to targeted diverse communities within the City.

To date, contact with the Korean community has been made by Jenny Chin, Committee member. Jenny will also follow-up with individuals involved in print and other media outlets to the Korean community.

Christine will follow-up with contacts in the Muslim community through local churches that hold services for the Muslim community.

Vanessa is following-up on scheduling "listening sessions" with senior members of Alfred Street Baptist Church and Shiloh Baptist Church.

Anestacia is also working through the faith community to establish relationships with those who serve seniors in the African American community.

Outreach to the Hispanic community and the LGBT will be initiated in January. Committee members will also work through City staff members who currently provide services for the City's many diverse communities.

The Diversity Committee would like to encourage any COA members or individuals they think would like to assist in these efforts to come to the January 28 meeting.