

**TESTIMONY BY JIM SHON**

**SUBMITTED: January 25, 2008 VIA EMAIL**

**FOR: Senate Committees on Education & Human Services and Public Housing**

**RE: SB 2043 /2031**

RELATING TO THE UNIVERSITY OF HAWAII CENTER ON AGING EDUCATION AND RESEARCH.

Appropriates funds to the University of Hawaii center on aging research and education faculty positions and program expenses.

**POSITION: STRONGLY SUPPORT**

NOTICE OF HEARING

DATE: Monday, January 28, 2008  
TIME: 1:15 pm  
PLACE: Conference Room 225

MEMBERS OF THE COMMITTEES,

I Support the Bill.

Hawaii remains oddly unfocused when it comes to addressing the growing demographic tidal wave of senior citizens in Hawaii. Hawaii has no long term care plan, no objective or autonomous policy analysis over aging issues, and no response to the retirement of the baby boomers. See attachment for information on one of the key gaps in our non system – aging in place.

As policy makers, you do not have a steady stream of research-based advice on aging issues. You do not have any entity that is independent of the more focused and narrower agendas of the University, or the various executive departments. You as policy makers deserve and need independent analysis and advice. The UH Center on Aging is the one organization that could truly play that role.

To date, most health care policy issues focus on acute care and insurance access, children's health, the shortage of doctors, etc.. But for those who are challenged by chronic care, those who are too wealthy to qualify for Medicaid, yet not wealthy enough to afford assisted living arrangements, they need support for their continued aging in their homes. Without a well funded Center on Aging, you will seldom have this strategy put before you.

Sincerely,

Jim Shon  
[jshon@hawaii.edu](mailto:jshon@hawaii.edu)

PS See attached information on the crucial need for program that support aging at home, and what has already been accomplished

### An Initiative for Aging At Home

One of the important thinkers in long-term care in Hawaii had been the late Professor Oscar Kurren, (former University of Hawaii Professor Emeritus, School of Social Work), who, in 1997, was increasingly interested in stimulating policies that would promote wellness and independence. In the fall of 1997, Kurren was enthused about a project in New York City proposed by the Independence Care System, Inc. (ICS). Kurren was touting an ICS business plan that sought to develop a new model of home and community-based care for 800 adults and children who were disabled. The ICS plan had four key elements: **consumer participation, emphasis on home and community-based care, a full range of services provide by a care team, and a truly integrated network to coordinate care over time, with multiple providers.** (ICS, 1997, p.ii) The stated goal of Independence Care was “to enable the severely disabled to remain at home or in the least restrictive setting possible, using the flexibility of risk-based capitation to substitute primary care, home care and community-based services for hospital and nursing home care.” (ICS, 1997, p.1) Quite rightly, ICS characterized its model as “A Chronic Care Management Demonstration Program” with a specially designed element of training for entry-level health and social service positions.

Kurren was tapping into the managed care mania that had also infected Hawaii’s Medicaid officials, but was offering an interesting twist: to redesign the system along chronic care and home care lines. He was able to recognize that in targeting the disabled populations, federal and state funding for disabled programs could be utilized to drive this new model.

Kurren’s model fit well with an early concept I’d developed while representing the Makiki district in the State House. Located in Makiki is of the most prominent residential facilities for elders in the State, Arcadia. Arcadia provided upscale apartments for healthy residents, and progressively supportive facilities, as people grew frailer. I had noticed, however, that Arcadia was a relatively limited and expensive alternative not open to many of the other residents of Makiki who lived in condominiums within blocks of Arcadia. My first working title for what was needed was: *Condo Care*. (Shon, FN, 1996)

### **Condo Care - 1996**

*Condo Care* emerged as a response to the demise of the State’s sponsored long term care plan: the Family Hope Program, which sought to provide funding for both community and institutional care. Calculated at approximately \$300 of taxes per working resident of Hawaii per year, the Family Hope proposal was just too complicated and government-driven for the post-Reagan era. *Condo Care* began with the question: *What could we afford if we assumed that people already had housing, and only needed services delivered to their homes?*

A brief sketch of the *Condo Care* concept included the following basic components: (Shon, FN, 1997)

- 1) The use of co-op or so-called sweat equity to control costs;
- 2) Targeting concentrated independent living arrangements, such as an apartment district in urban Honolulu;
- 3) Utilizing an already developed interfaith ministries serving elders;
- 4) A focus on sub-acute care services only, such as financial planning, custodial care, home maintenance, transportation, recreation, buddy systems, hot meals, care management, health services referrals, and a purchasing pool for health aids and assistive technology;
- 5) Development of a regular income stream to sustain the operation, such as insurance premiums or subscription rates;
- 6) Affordability for the middle and lower middle class;
- 7) Avoidance of strong links to the Medicare or Medicaid systems.

### **The Wisteria Project 2000 - Components**

To identify and develop its components, The Wisteria Project, challenged the participants to explore the following questions:

1. How to facilitate and nurture new partnerships without reliance on government leadership?
2. How to tease out of the public bureaucracies and private foundations start-up funding that recognizes complex networks of partners and interventions rather than safer, single-intervention experiments?
3. How to overcome structural or cultural barriers to college and university participation in an ongoing, sustainable partnership that delivers needed community-based research and services while providing valuable real-world education?
4. How to utilize our understandings of Third Wave organizational management and networks to organize such a system?
5. How to utilize current and futuristic techniques in gathering meaningful data, designing appropriate benefits, and evaluating the effectiveness of the alternative system?
6. How to design an alternative delivery system that is theoretically capable of achieving the following goals:
  - a. To prevent or delay significant numbers of elders from becoming physically and fiscally dependent on the state;
  - b. To utilize existing community assets such as individual equity in homes, the interests and needs of seniors to remain active and engaged in productive activity, and the potential to partner institutions such as high school and college service learning programs;
  - c. To meet the needs of a substantial number of elders who are too rich for Medicaid, yet too poor for privately funded assisted living;
  - d. To recognize naturally occurring communities, as well as client-designed, driven and participation in non-medical, wellness activities and services; and,
  - e. To create a system that is economically self-sufficient and sustainable through client-based subscriptions.

**Key elements of the Wisteria Model that evolved from the attempts to answer these questions included:**

- The creation of a non-profit agency governed by a power sharing partnership board representing the university, key community-based agencies, government, and consumers;
- The mission of such a non-profit agency to deliver a case-management-driven benefit package of non-medical services through a service delivery team for affordable subscription fees;
- An intergenerational institutional link with the university system through structured service-learning supports to the delivery teams, including assignment of practicum students to the teams and class projects that would evaluate community needs and delivery effectiveness;
- A “closed-system” model of service banking that encouraged community clients of the teams to be active in contributing to the network and who could, in exchange, receive various benefits such as reduced subscription rates and the right to transfer service banking credits to family and friends.
- Initial recruitment of network members through a limited grant that would allow them to sample the benefits of the network, as well as participate in the development and refinement of the delivery system.

**Fast-forward to 2007**

**Two Promising mainland program models**

The *Beacon Hill Village* in Boston program provides the following services:

**Household Services**

- Home repair and adaptation
- Household cleaning—routine and heavy

- Errands... organize closets, mail packages
- Home office: computer problem solving, bill paying, etc.

#### **Transportation**

- Individual and group rides to anywhere—doctors, airport, friends, cultural events

#### **Meals and Groceries**

- Weekly grocery shopping
- Home-delivered meals, elegant or casual
- Dining groups

#### **Volunteer programs**

- Opportunities for members to help each other
- BHV members assist in the community and local non-profit groups

#### **Concierge Service**

- Delivered exclusively by HouseWorks, an excellent in-home service provider
- Rides to the grocery store, local errands, and appointments
- Pick up a prescription, dry cleaning
- Hang curtains, rearrange furniture
- Pack boxes
- Mail a package
- Wait for a repair person
- Pick up theatre and symphony tickets
- Take in computer for repairs
- Water plants & pick up mail during a vacation
- Bring in car for repairs

The **Beacon Hill Village** membership, open to those 50 years and above, costs \$580 for individuals and \$780 for households.

About to launch a similar program nearby is *Cambridge at Home*. Cambridge At Home was founded by Cambridge residents on the model of the path-breaking Beacon Hill Village in Boston. “Cambridge At Home is a cooperative community formed to ensure the timely availability of services similar to those of a retirement community. We have a professional staff that will provide members with access to evaluated suppliers who will provide prompt service at known costs. This centralized service means that members have timely help available as challenges or emergencies arise at home. With a phone call or an email, CAH members will get help from friendly, competent staff in areas like transportation, health, social activities and home maintenance so they can remain safely and confidently in their homes as they age.”

**Cambridge at Home** provides services relating to daily living (shopping, electrical transportation, plumbing, house cleaning, laundry, meal preparation, checking account, home maintenance, tax returns) health and fitness (yoga/meditation, skilled nursing, physical therapy, organizing medication, schedule exercise, home health care, nutrition and diet, medical equipment, personal trainer, filing claim forms) and, the most popular with seniors, organized activities (walking groups, discussion groups, trips, how-to classes, volunteering, music groups, art classes and sports).

**Cambridge at Home** membership fees are \$1,200 per couple, or \$900 for individuals. Specific services such as field trips have additional fees. A bus trip to a museum might cost \$95 for members and \$120 for guests, which also includes meals.

#### **Hawaii**

A recent governmental initiative attempting to coordinate and addressing community outreach services was the **Hawaii State Plan on Aging 2004-2007**, which, through various programs funded through the

Executive Office on Aging (EOA), sought to strengthen or expand these programs. Unfortunately, the level of funding for outreach and the level of commitment to EOA has been weak in recent years.

EOA operates the *Kupuna Care Program*, which includes the following services:

- Adult Day Care
- Assisted Transportation
- Attendant Care
- Case Management
- Chore services
- Home Delivered meals
- Homemaker
- Personal Care

In order to qualify for the program, which does not have the capacity to serve all who need such services, seniors must be impaired in two or more ADLs – Activities of Daily Living (eating, bathing, dressing, transferring from bed to chair, controlling bowel & bladder, and moving about the house safely) or significantly reduced mental capacity, or two IADLs – Instrumental Activities of Daily Living (preparing meals, shopping, taking medications, managing money, using phones, doing housework, and using public transportation).

**The Hawaii State Plan on Aging: 2004-2007**

This plan clearly identifies a number of key strategies and unmet needs, which clearly fits with an aging at home agenda:

- Information to make informed decisions
- Programs and Services to Live at Home
- Information on Elder rights and benefits
- Partnerships to address emerging and existing issues

**The State Plan also identified estimated unmet needs by senior programs in all four counties. In the City and County of Honolulu, for example, it was estimated that over 20,333 seniors continue to need transportation, 17,844 cannot find case management, 20,661 need chore services, and 19,630 housekeeping. Needs unmet by Hawaii public or private programs also include personal care (20,710), home repairs/maintenance (24,898), interpretation/translation (26,332), letter writing/reading (16,289), money management (22,384), and meals delivered at home (23,355)**

**Testimony Presented Before the  
Senate Committee on Education and  
Senate Committee on Human Services and Public Housing**

January 28, 2008  
1:15 p.m.  
State Capitol, Conference Room 225

by

Dr. Gary K. Ostrander  
Vice Chancellor for Research and Graduate Education &  
Interim Dean for the John A. Burns School of Medicine  
University of Hawai'i at Mānoa

**SB2043 – RELATING TO THE UNIVERSITY OF HAWAII CENTER ON AGING  
EDUCATION AND RESEARCH**

Chair Sakamoto, Chair Chun Oakland, and Members of the Committees:

Thank you for this opportunity to testify. The University of Hawai'i at Mānoa supports the intent of this measure so long as it does not adversely impact the priorities set by the University in our Board of Regents approved budget request. The University has many needs, most notably repairs and maintenance, maintaining our library collections, and safety and emergency preparedness. Addressing these urgent needs is critical to our ability to perform the functions the state needs us to perform – including the study of aging.

However, we do believe that the objective of re-developing the Center on Aging is worthwhile. In fact, Chancellor Hinshaw recently charged me with the re-development of the Center on Aging under the auspices of my office of the Vice Chancellor for Research and Graduate Education. This is because our efforts on aging are truly cross-campus and interdisciplinary in nature. We have begun planning a multidisciplinary approach to what we believe will be a critically important facility for the state of Hawai'i.

Thank you for this opportunity to submit testimony.

To the Honorable Members of the Joint Senate Committee on Human Services and Education, who have scheduled a public hearing on S.B. 2043, a bill relating to the U.H. Center on Aging Research and Education (CARE) on Monday, January 28, 2008 at 1:15p in Room 225.

Aloha kakou.

I am in support of S.B. 2043 because Hawai'i needs an "appropriate partner" to coordinate the research, education, and training needs of an aging network faced with growing numbers of older Adults who are living longer, with many needs. CARE's mission of assuring the well-being of our state's older adults is in jeopardy as its resources are not sufficient to the task of stimulating and coordinating gerontological and aging research, community services and training/ instruction.

Our Area Agency on Aging, the Maui County Office on Aging, is in need of the type of services and program support that a fully functioning and resourced CARE can provide. Our own federal and state mandates will be met, more effectively and efficiently if we had a responsive partner, couched in programs that are both academic and community-engaged. I believe this bill will finally make CARE the "inclusive, information sharing, interdisciplinary", responsive and "appropriate partner" we desperately need. Please support S.B. 2043.

Me ka mahalo pono.

John A. H. Tomoso, MSW, ACSW, LSW  
Maui County Executive on Aging  
808-270-7350  
john.tomoso@mauicounty.gov



Testifier: Laura Manis

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COMMITTEE ON EDUCATION  
Sen. Norman Sakamoto, Chair  
Sen. Jill Tokuda, Vice Chair

COMMITTEE ON HUMAN SERVICES AND PUBLIC HOUSING  
Sen. Suzanne Chun Oakland, Chair  
sen. Les Ihara. jr. Vice Chair

Monday, January 28, 2008 1:15 pm Rm 225

SB2831 RELATING TO UNIVERSITY OF HAWAII CENTER ON AGING  
EDUCATION AND RESEARCH Appropriates fund to the University of Hawaii center on  
aging research and education faculty positions and program expenses.

**SUPPORT**

Kokua Council whose mission includes advocating for the the health of the elderly and those  
vulnerable populations who can not advocate for themselves supports this bill.

The Center on Aging at the University of Hawaii served a vital role to the State of Hawaii and the  
creation of public policy in the area of aging. They have trained gerontologists and researchers who  
have helped state and nonprofit agencies staff and develop their programs.

Our state has to prepare now for the onslaught of the baby boomers reaching 60 in the next few  
years and who will be having needs that require a new look at state services and best practices.

The Center has never been fully supported by the university and has since lost their staff and  
funding and are no longer accepting students.

**We suggest the funding be directed solely to the Department of Social Work who has  
expressed interest in housing the Center.**

Please support this bill.

Laura G. Manis, Legislative Chair



L A T E

**Testimony Presented Before the  
Senate Committee on Education and  
Senate Committee on Human Services and Public Housing**

January 28, 2008  
3:45 p.m.  
State Capitol, Conference Room 225

by

Dr. Gary K. Ostrander  
Vice Chancellor for Research and Graduate Education &  
Interim Dean for the John A. Burns School of Medicine  
University of Hawai'i at Mānoa

**SB2831 – RELATING TO THE UNIVERSITY OF HAWAII CENTER ON AGING  
EDUCATION AND RESEARCH**

Chair Sakamoto, Chair Chun Oakland, and Members of the Committees:

Thank you for this opportunity to testify. The University of Hawai'i at Mānoa supports the intent of this measure so long as it does not adversely impact the priorities set by the University in our Board of Regents approved budget request. The University has many needs, most notably repairs and maintenance, maintaining our library collections, and safety and emergency preparedness. Addressing these urgent needs is critical to our ability to perform the functions the state needs us to perform – including the study of aging.

However, we do believe that the objective of re-developing the Center on Aging is worthwhile. In fact, Chancellor Hinshaw recently charged me with the re-development of the Center on Aging under the auspices of my office of the Vice Chancellor for Research and Graduate Education. This is because our efforts on aging are truly cross-campus and interdisciplinary in nature. We have begun planning a multidisciplinary approach to what we believe will be a critically important facility for the state of Hawai'i.

Thank you for this opportunity to submit testimony.

L A T E

**TO :**           **TO :** SENATE COMMITTEE ON EDUCATION  
                  Senator Norman Sakamoto, Chair  
                  Senator Jill, N. Tokuda, Vice-Chair

SENATE COMMITTEE ON HUMAN SERVICES AND PUBLIC HOUSING  
Sen. Suzanne Chun Oakland, Chair  
Sen. Les Ihara, Jr., Vice Chair

**FROM:**       Eldon L. Wegner, Ph.D.,  
                  PABEA (Policy Advisory Board for Elder Affairs)

**SUBJECT:**   SB 2831 Relating to the University of Hawaii Center on Aging Education and Research

**HEARING:**   3:45 pm Monday January 28, 2008  
                  Conference Room 225, Hawaii State Capitol

**PURPOSE:**   Appropriates funds to the University of Hawaii Center on Aging Research and Education (CARE) for faculty positions and program expenses.

**POSITION:**  **PABEA SUPPORTS THE APPROPRIATION FOR THE UH CENTER ON AGING RESEARCH AND EDUCATION. WE PREFER THE APPROPRIATION BE MADE AS AN ADJUSTMENT TO THE UNIVERSITY OF HAWAII BUDGET.**

**RATIONALE:**

I am offering testimony on behalf of PABEA, the Policy Advisory Board for Elder Affairs, which is an appointed board tasked with advising the Executive Office on Aging (EOA). My testimony does not represent the views of the EOA but of the Board. I am also a professor of medical sociology at UH-Manoa who has worked with elderly services in Hawaii for more than 20 years.

- The UH Center for Aging Research and Education (CARE) is currently without a director or any faculty positions and has been unable to admit students for 3 years to its academic programs.
- Chancellor Virginia Hinshaw, who began after the UH Manoa Supplementary budget request was developed, has indicated her strong support for CARE and has drafted a plan calling for similar resources as this bill.
- § The UH Center constitutes the principal resource for technical consultation for agencies serving the elderly, including training programs and workshops for professional and paraprofessional staff working in the community. The Center faculty and staff are needed for basic research in the field of aging as well as applied research, such as needs assessments and program evaluation. The Executive Office on Aging relies on contracts with the Center for many technical reports important to carrying out its activities.
- § There are currently acute shortages in Hawaii of human resources in all the paraprofessional and professional fields in gerontology. To meet this need, the UH Center is critical for training students in this growing field and needs to provide for seamless educational opportunities from the Community College level through professional programs.

Thank you for allowing me to testify.

TO: JOINT SENATE COMMITTEE ON HUMAN SERVICES AND PUBLIC  
HOUSING AND EDUCATION  
Senator Suzanne Chun Oakland, Chair  
Senator Norman Sakamoto, Chair

FROM: PAT SASAKI

RE: SB 2831, RELATING TO THE UNIVERSITY OF HAWAII CENTER ON AGING  
EDUCATION AND RESEARCH

HEARING: MONDAY, JANUARY 28, 2008  
STATE CAPITOL, CONFERENCE ROOM 225  
3:45PM

POSITION: SUPPORT

My name is Pat Sasaki. I am testifying in support of SB 2831, Relating to the University of Hawaii Center on Aging Education and Research.

The University of Hawaii would be remiss if it does not commit and allocate resources to the Center on Aging Research and Education that, through two decades, has spurred innovation and efficacy among Hawaii's aging programs statewide. The Center on Aging, established in 1988 with broad community and legislative support, has significantly contributed to studies often used by Legislators and professional trainings that fostered University relations with the statewide service community. The Center has assured informed and qualified technical support to such developments as geriatric nursing and medicine, Alzheimer's disease outreach, aging program evaluation and dissemination, long-term care access, and family caregiver support.

Critical support from the State and University are long overdue for the Center on Aging. The center ultimately benefits a population that is having and will have the greatest impact on Hawaii's socioeconomic well-being.

I urge your passage of this measure. Thank you for the opportunity to testify.

# Hawaii Aging Advocates Coalition

## Testimony to the Joint Senate Committee on Human Services and Public Housing and Education

Monday, January 28, 2008  
Conference Room 225; 3:45pm

### Founding Organizations

City & County  
of Honolulu  
Elderly Affairs  
Karen Miyaki  
Craig Yamaguchi

City & County  
of Honolulu  
Service Providers  
Tony Wong

FACE  
Stan Bain  
Jim Howell

Hawaii Caregiver  
Coalition  
Tony Lenzer

HARA  
Al Hamai  
Bruce McCullough

Hawaii County  
Office on Aging  
Alan Parker  
Lito Asuncion

Hawaii County  
Service Providers  
Debra Nakaji

JACOSA  
Lyn McNeff

Kauai Agency on  
Elderly Affairs  
Kealoha Takahashi

Kokua Council  
Larry Geller

Maui County  
Office on Aging  
John Tomoso

Maui County  
Service Providers  
Kathy Louis

Maui Long Term  
Care Partnership  
Rita Barreras

PABEA  
Gary Simon  
Eldon Wegner

Co-Conveners  
Wes Lum  
Hawaii Caregiver  
Coalition

Harry Mattson  
Kokua Council

## **RE: S.B. NO. 2831, RELATING TO THE UNIVERSITY OF HAWAII CENTER ON AGING EDUCATION AND RESEARCH.**

Chairs Chun Oakland and Sakamoto, and Members of the Joint Committee,

My name is Wes Lum and I am testifying on behalf of the Hawaii Aging Advocates Coalition (HAAC). **HAAC strongly supports this measure.**

This measure appropriates funds to the University of Hawaii Center on Aging Research and Education (CARE) for faculty positions and program expenses.

We are pleased with Chancellor Virginia Hinshaw's vision of CARE, and we support her efforts to implement her vision because the current Center on Aging has been neglected for too many years on the UH Manoa campus.

There is no funding request in the Supplemental Budget for these positions and expenses, but we hope that as Legislators, you will see the value of CARE as a vital component of Hawaii's long-term care infrastructure. We ask that you provide the leadership necessary to ensure that aging research, training, and education is developed to meet the needs of Hawaii's growing aging population.

Thank you for the opportunity to testify.