

**THE NATIONAL RESOURCE CENTER ON  
SUPPORTIVE HOUSING AND HOME MODIFICATION  
Quarterly Report  
April 1 – June 30, 2004**

**I. PROJECT ADMINISTRATION**

The National Resource Center on Supportive Housing and Home Modification (the *Center*) continues to work towards its mission of making supportive housing and home modification a more integral component of successful aging, long-term care, preventive health, and the development of elder-friendly communities. The Center is also active in promoting home modifications as an effective intervention for caregiving in the home. (See Project CARES below.) The Center is pleased to have assistance from Katie Smith, an occupational therapy student intern from the University of Southern California School of Occupational Science and Occupational Therapy. Ms. Smith is working with a local facility to improve its FallProof program aimed at preventing falls among its residents.

**II. CENTER ACTIVITIES**

Center activities focus on the two major residential settings in which frail elderly and persons aging with a disability live: 1) existing single and multi-unit housing; and 2) new single and multi-unit housing. Activities use five major approaches: a) building a solid knowledge base through applied research and policy analysis; b) conducting education and training; c) providing ongoing and short-term intensive technical assistance; d) advocacy; e) creating and disseminating timely targeted information; and f) sustainability.

**A. APPLIED RESEARCH AND POLICY ANALYSIS**

**1. Assessing the Collaborative Relationship of Area Agencies on Aging (AAAs) and Centers for Independent Living (CILs) in Home Modification Programs, Advocacy and Services.**

Center Senior Policy Analyst Phoebe Liebig and graduate Research Assistant Kali Peterson are proceeding with a follow-up study of AAAs and CILs in California. The study seeks to gather information on the collaborative efforts of AAAs and CILs in the area of home modification. The response rate to the survey has been encouraging. Data have been inputted and clean-up queries are being made. It is expected that the study will provide both organizations with opportunities to reduce fragmentation in their delivery of home modification to their respective clientele.

**2. Assessing the Role of State Independent Living Centers in Home Modification Funding and Services.**

This report will highlight the role of the various State Independent Living Centers in the area of home modification funding and services. It is still in a work-in-progress.

3. **Monitoring of State and Local Legislative/Policy Activities in Supportive Housing/Home Modification.**

The Center is happy to report that AB 2702 (Steinberg – Housing: second units) passed the California Assembly on May 27, and is now being heard in the Senate. This bill is intended to facilitate approval of “granny flats” or “in-law” units. This type of housing option can allow the elderly and persons with disabilities to age in place and obtain family support.

4. **The Community Portfolios Project – Institute for Health, Aging, and Policy (IHAP).** Center staff have completed preliminary analyses of the City of Pasadena and the City of Los Angeles (specifically, the Wilshire Community Planning Area) in an effort to identify obstacles to incorporating elder-friendly characteristics into city planning and to identify strategies used to overcome these barriers. Preliminary results from case studies, including asset mapping and content analysis of planning documents, were presented at the 2004 American Society on Aging meeting. Staff prepared a grant proposal to the John Randolph Haynes and Dora Haynes Foundation in an effort to secure funding to complete more thorough case studies and expand them to other areas.

5. **New research. - Accessory Dwelling Units: Housing America’s Multigenerational Families.** Dr. Liebig and Research Assistant Teri Koenig are constructing a questionnaire to gather information on how cities are facilitating the desire of America’s multigenerational families to live together and support each other through the creation of Accessory Dwelling Units (ADUs). Upon completion, the survey will be sent to cities nationally that are known to have passed ordinances and/or conditional use regulations that promote the setting up of ADUs. (An ADU is defined as a residential unit that provides complete independent living facilities for one or more persons. The unit can be attached or detached, and occupy the same parcel of land as the single or multi-family dwelling. These units are commonly referred to as “granny flats” or elder cottages, “in-law” or accessory apartments, garage apartments, duplexes and triplexes.

**B. EDUCATION AND TRAINING**

To increase professional knowledge and stimulate consumers to demand quality products and home modifications, the Center conducted the following training and education activities this quarter:

1. **Project CARES (Caregiver Adaptations To Reduce Environmental Stress).** Activities implemented during the past quarter for the Administration on Aging and Center-funded Caregiver Adaptations to Reduce Environmental Stress (CARES) project focused on: (a) the online training of aging network service providers on how to effect systems change in delivering home modification and assistive devices (or environmental coping strategies, ECS); (b) a compilation of a resource binder with information related to ECS; and, (c) dissemination / education activities.

a) **Online training of aging network service providers on how to effect systems change in delivering home modification and assistive devices.**

A total of 23 Area Agencies on Aging (AAAs) are in the process of implementing their respective Plans of Action (PoAs), following the CARES online training. An evaluation is being conducted with the first group of CARES participants who have completed the 6-month period of implementation with technical assistance by project staff. The evaluation questionnaire was reviewed by members of the Project Advisory Committee. Evaluation of the course provided valuable feedback to project staff. Participants who completed the course found the information extremely valuable. One respondent said she became aware of her local Independent Living Center from the course information. This was a new resource to her to help family caregivers. The second group of participants is in its 6-month period of implementation with technical assistance. Participants in both groups completed a short questionnaire at three months into the implementation of their PoAs. Many were challenged by lack of time and multiple tasks in their positions. However, many were still working towards their goal even if behind schedule. Some proposed larger projects in their PoAs, but they have established support within their agencies to sustain their efforts in completing their PoAs beyond the 6-month phase. Some examples of PoAs for promoting CARES included: consumer presentations and displays; in-service training of AAA staff about home modifications and assistive devices; developing a resource guide of local service providers and product distributors; and identifying and utilizing assessment tools that address environmental issues. A six month evaluation will be completed with each of the participants to evaluate their progress to that point.

- b) CARES Resource Binder. Of the 622 Area Agencies on Aging targeted, CARES staff have already mailed out 377 copies of the Resource Binder around the country. The binder contains information related to home modification and assistive devices, and will help aging network service providers. The resource binder includes a description of the CARES project, the Center, general fact sheets about home modifications and assistive devices for caregiving, sample safety checklists, and links to and samples of caregiver and home modification information.
- c) CARES Dissemination / Education. Project Manager Dory Sabata will be participating at the Alzheimer's Association 12<sup>th</sup> National Alzheimer's Disease Education Conference, July 16-18 in Philadelphia, Pennsylvania. She will be presenting a poster session entitled "Caregiver Adaptations to Reduce Environmental Stress (CARES): Successful Strategies of Area Agencies on Aging."

- 2. Second Symposium on Housing for Persons With Disabilities. Center Associate Richard Duncan presented two sessions at this June 30 event that was held in Washington, D.C. The symposium was organized and hosted by the U.S. Department of Health and Human Services, Office on Disability, and was offered as a live webcast. Mr. Duncan's presentations were entitled

- “Understanding Residential Universal Design” and “Access Modification: Understanding What It Is and Its Importance.” More than 50 people were in attendance with many more participating real time over the internet.
3. **Association for Gerontology in Higher Education (AGHE)**. Center Policy Analyst Phoebe Liebig presented on “The Continuum of Care and Aging Policy” at a training program for faculty of historically Black colleges, June 24-25 in Tallahassee, Florida. The event was a joint project of Utica College and AGHE. Dr. Liebig’s presentation focused on various housing options for the elderly and the policies affecting them.
  4. **Latino Caregiver Conference**. Center Research Assistant Aly Lopez-Duzich presented a workshop on home modifications at a one day conference for Spanish-speaking caregivers. The June 5 event, organized by the City of Los Angeles Department of Aging, was attended by over 100 people and was held at the University of Southern California, Davidson Conference Center.
  5. **Keiro Senior HealthCare – Community Based Care Programs**. Center Associate Chris Lee presented a workshop entitled “Home Modification and Home Safety” at this May 23 event organized by Keiro Senior HealthCare. The afternoon mini-conference took place at the Venice Japanese Community Center and was attended by over 20 Japanese-American caregivers and older adults.
  6. **American Occupational Therapy Association (AOTA) Annual Conference**. At the May 19-22 AOTA Annual Meeting held in Minneapolis, Center Associate Dory Sabata served as a panelist in a workshop on home modification. The title of her presentation was “Home Modification: A Model For Aging In Place.”
  7. **AARP C.A.R.E.S. Retreat**. Center Associate Chris Lee presented a workshop entitled “Home Modification” at the May 11 retreat for family caregivers organized by AARP. The retreat took place at Rancho Palos Verdes near Los Angeles and was attended by over 30 caregivers. (AARP C.A.R.E.S. is short for Caregiving, Assistance, Respice, Education & Service.)
  8. **2004 National Planning Conference**. Center Associate Richard Duncan was invited to present at the annual meeting of the American Planning Association, April 24-28 in Washington, D.C. Mr. Duncan’s presentation was entitled “Universal Housing” and was attended by over 20 planners from around the country.
  9. **Training Course on the Internet (Executive Certificate in Home Modification)**. Students enrolled in the Executive Certificate Program successfully completed “Home Modification: How to Get it Done” this quarter and are currently completing “Home Modification: Raising Community Awareness and Coalition Building.” Several more students have successfully completed “The Basics and Beyond” course when given the option of working at their own pace. There is currently a waiting list for a new session of the Executive Certificate Program that is tentatively scheduled for Fall 2004.

C. **TECHNICAL ASSISTANCE**

The Center provides on-going and short-term intensive technical assistance to established groups and the general public upon request. Technical assistance activities this quarter included:

1. **Local Home Modification Action Coalitions.** The Center provides guidance to communities wishing to create and/or sustain home modification coalitions. This includes advising them on how to: select coalition members; assess community needs; determine governance and administration; coordinate meetings; lead meeting discussions and keep the coalition on track; conduct follow-up with the lead agency; and organize and plan activities.

**a) Ventura Home Modification Action Coalition** (Ventura, California). The Ventura Coalition held its second annual Home Modification Summit on Saturday, May 8. The Summit this year was entitled “Aging in Place – New Solutions” and was attended by over 34 people. The Center made available its fact sheet on home modification and another from Project CARES on home modification and caregiving. The Center provided financial assistance to a coalition member to attend and present at the 2004 Joint Annual Conference of the American Society on Aging (ASA) and the National Council on Aging (NCOA), April 14-17, in San Francisco, California.

**b) Universal Design Alliance** (Suwanee, Georgia). Coalition member Rebecca Stahr attended and presented at the 2004 Joint Conference of ASA/NCOA. She was a panelist in a workshop on the topic of home modification and aging-in-place. The Universal Design Alliance has its own website at [www.universaldesign.org](http://www.universaldesign.org).

**c) Homes For Life Coalition** (Howard County, Maryland). The coalition continues to be active in promoting home modifications for aging in place. Ms. Phyllis Madachy attended and presented at the Joint ASA/NCOA conference, while Ms. Janie Scott presented at the June 30 Second Symposium on Housing For Persons With Disabilities. The Symposium was organized by the Office on Disability, U.S. Department of Health and Human Services and was offered as a live webcast. Center Associate Richard Duncan presented a one-day workshop sponsored by the coalition on April 20. In attendance were home builders, building code officials and housing developers. This coalition’s website is <http://www.homesforlifecoalition.org>.

2. **U.S. Administration on Aging.** Center Senior Policy Analyst Phoebe Liebig is serving as an evaluator / field reader in this year’s Older Americans Act, Title IV discretionary grant program. Dr. Liebig will be evaluating grant proposals for the 17 new Naturally Occurring Retirement Communities projects that have been earmarked for this fiscal year.

3. **National Council on Seniors’ Housing (NCOSH).** Center Associate Richard Duncan continues to participate on the Curriculum Development Committee of NCOSH. The Council is sponsoring a year long process to develop teaching modules to educate builders in the particulars of planning and designing active senior living projects. Universal design will play a large role in the design criteria of the program.

4. **National Council on Aging (NCOA)**. Center Director Jon Pynoos has been invited to participate as a member of an NCOA steering committee. The committee is in the process of planning a national conference on fall prevention scheduled to be held in Washington, D.C. in December this year.
5. **National Center for Seniors' Housing Research**. Dr. Pynoos continues to serve on the group's Advisory Council which is part of the National Association of Home Builders Research Center.
6. **Center for Universal Design, Advisory Committee**. Dr. Pynoos continues to serve on the Advisory Committee of the Center for Universal Design, headquartered at the University of North Carolina in Chapel Hill, North Carolina
7. **Menorah Housing Foundation**. Dr. Pynoos continues to serve on the Advisory Board of this Foundation which works to improve the supply of affordable senior housing in the Los Angeles area.
8. **Los Angeles County Long-Term Care Coordinating Council**. Dr. Pynoos continues to serve on this Coordinating Council which seeks to implement the County of Los Angeles Strategic Plan for Aged and Disabled.
9. **California Commission on Aging**. Dr. Pynoos continues to serve on the State Commission on Aging. He provides expert advice on matters relating to housing and supportive services for the elderly. The last Commission meeting was held May 4-5 in Oakland.
10. **Southern California Presbyterian Homes (SCPH)**. Dr. Liebzig continues to serve on SCPH's Executive Committee, and remains Chair of the Committee for the Future. As Chair, she spends a significant amount of time and effort on public policy issues and working with both state and national umbrella organizations, such as the California Association of Homes and Services for the Aging (CAHSA) and the American Association of Homes and Services for the Aging (AAHSA). She is involved with the SCPH on developing a strategic plan and a public policy capacity.
11. **Angelus Plaza**. Dr. Liebzig continues as the Vice-President of the Advisory Council for Angelus Plaza's Activity Center, and also a member of the Planning and Evaluation Committee which works on strategic planning for the Activity Center. (The Angelus Plaza is a housing complex of 1,093 one-bedroom units in five high rise towers, situated in downtown Los Angeles. It is the largest affordable housing community for the elderly in the nation.)
12. **Institute for the Future of Aging Services (IFAS), American Association of Homes and Services for the Aging**. Dr. Liebzig continues as a Commissioner on IFAS, a policy research center uniquely designed to help answer the question of how to most effectively meet the needs of our older citizens. This quarter, she attended a meeting in Boston to discuss issues surrounding affordable assisted living.
13. **Fall and Injury Prevention Among Older Adults Project**. The Center is represented on this Community Consortium that is headquartered at the Roybal Institute for Applied Gerontology, California State University, Los Angeles. At the May 7 meeting, Center staff updated members about the

California state-wide initiative on fall prevention that included the role of home modification.

14. **American Society on Aging (ASA)**. Center Associate Dory Sabata is now an invited member of ASA's special interest group called Network on Environments, Services and Technologies for Maximizing Independence (NEST). She has been chosen to be guest editor of the group's newsletter, "Maximizing Human Potential," for a 2005 issue focusing on fall prevention. Center Program Manager Maria Henke and Dr. Sabata are also on ASA's Planning Committee for their 2005 Annual Meeting.
15. **State of California Senate Subcommittee on Aging and Long Term Care**. Dr. Liebig continues to serve as an advisor to the California Senate Subcommittee on Aging and Long-Term Care. This quarter she reviewed a questionnaire focused on expanding a program to provide home modifications for older Californians.
16. **National Association of Home Builders (NAHB) Remodelers' Council**. Center Associate Leon Harper continues to serve on the Board of Governors for NAHB's CAPS project. Short for "Certified Aging-in-Place Specialist," the CAPS program teaches the technical, business management, and customer service skills essential to competing in the fastest growing segment of the residential remodeling industry focused on retiring baby boomers. The program also involves education on home modifications for aging-in-place.
17. **Short Term Technical Assistance**  
As a national clearinghouse for information and advisement, the Center answered many short term technical assistance requests on products, funding, program development and resources during the months of April, May, and June 2004. There were approximately 40 requests via the Center's email ([homemods@usc.edu](mailto:homemods@usc.edu)) and over nine logged requests over the telephone. The Center sent out over 25 letters/faxes to consumers, caregivers, and professionals who had requested more information with respect to supportive housing and home modifications. (See Appendix A.)

**D. ADVOCACY**

1. **The National Home Modification Action Coalition (NHMAC)**. Thanks to the efforts of Center Associate Leon Harper, the Center is pleased to announce that NHMAC has been officially incorporated in the State of Virginia as of June 17. Mr. Harper serves as NHMAC's chairperson and maintains ongoing contact with the various sub-committees. Until now, the National Home Modification Action Coalition was an informally constituted group of professionals, researchers, practitioners, advocates, and consumers committed to furthering the cause of home modification in the nation. As a 501(c)(3) organization, the Coalition will now be able to solicit grants and charge membership dues to further the group's agenda.
2. **National Home Safety Council**. Mr. Harper represented the Center at the April 27 grand opening of the Home Safety Council's new office in Washington, DC. This completed the separation of the Council from the Lowe's Company. Mr. Harper continues to serve on the Council's technical

advisory board and advises on issues related to universal design and home modifications, among other things.

3. **American Occupational Therapy Association (AOTA)**. At the May 19-22 AOTA Annual Meeting, Center Associate Dory Sabata was appointed to serve on its Home and Community Health Special Interest Section. Dr. Sabata has also accepted to serve as AOTA's Home Modifications Network Manager. In this capacity, she will be able to serve as a professional advocate in the OT network for home modification interventions.

**E. INFORMATION DISSEMINATION**

The Center provides timely information targeted to professionals, consumers, service providers, policymakers, and private sector suppliers. Specific examples include:

1. **The National Home Modification List Serve**. The Center continues to make use of this national list serve to disseminate information related to home modification, to publicize the Center's activities, and to keep abreast of developments in the field.
2. **The California Home Modification List Serve**. The Center continues to administer this state-wide list serve on home modifications for individuals interested in new developments, strategies and networks. Over 100 individuals participate in the list serve, and the Center regularly updates the list serve membership on related activities and opportunities in the field of home modification in California.
3. **The Home Modification News**. The May issue of the Center's newsletter, the *Home Modification News*, was mailed out to approximately 1200 persons on our mailing list. The next issue is expected out in August, 2004. The newsletter contains information about activities at the Center, including its projects and other information related to home modification. An online version of the newsletter is available at [www.usc.edu/dept/gero/nrcshhm/](http://www.usc.edu/dept/gero/nrcshhm/). (Click on *Newsletter* at the top of the web page.)
4. **National Directory of Home Modification Resources**. This online directory provides consumers and service delivery professionals with information about home modification resources. The Center continues to receive numerous requests from professionals to have their home modification programs listed in this Directory. The Directory is available on the Center's website, [www.homemods.org](http://www.homemods.org), under the link labeled "National Directory of Home Modification Resources." The Center continues to update contact information and add new home modification programs and services as they become known.
5. **"Home Safety Guide For Older People – Check It Out / Fix It Up."** The Center has granted permission to the Mid County Senior Services of Newtown Square, Pennsylvania to reproduce the above publication on home modification. The organization intends to disseminate this publication to members of the Housing and Home Repair Committee that is sponsored by the local Area Agency on Aging.

6. **Center's Home Page - Web Site Maintenance and Expansion.**
  - a) The website received an average of 7,325 hits per day over the last quarter and almost 35,000 unique visits this quarter.
  - b) Center staff are developing strategies to ensure the sustainability of the website over the next three years including sponsorships.
  - c) The Center is currently recruiting a new web editor to take the place of Ms. Aly Lopez.
7. **Fact Sheets.** The Center continues to disseminate its fact sheets at various local, state, and national events. The fact sheets and the Center's brochure are included in out-going correspondence. The fact sheets are available online at the Center's website: [http://homemods.org/center\\_publications/index.htm](http://homemods.org/center_publications/index.htm).
8. **California Directory of Home Modification and Repair Services.** The Center is disseminating copies of this publication which was published by the California Department of Aging. More than ten copies have been sent to various Centers for Independent Living around the state. This publication, along with two other fact sheets on home modification, is now accessible at the California section of the Center's website ([www.homemods.org](http://www.homemods.org)).
9. **Journal of Aging and Social Policy.** Center staff Drs. Liebig and Pynoos are working on a journal article for an upcoming issue of the *Journal of Aging & Social Policy*. The article, entitled "Housing, Caregiving and the Changing American Family: Issues, Current Strategies, and Recommended Reforms," will focus on how accessory housing can meet the needs of elders for additional income/affordable housing, increased access to companionship and services, enhanced family support and reduced social isolation.
10. **Encyclopedia of Aging.** (update)Dr. Liebig is rewriting her article entitled "Tax Policy" for the Encyclopedia of Aging. The article looks at the important but often overlooked component of federal, state, and local tax policies for the elderly and its impact on senior housing. Dr. Liebig is also updating her entry entitled "Inflation Impact and Measurement." Besides looking at the impact of inflation relative to aging, the updated article will touch on housing inflation.
11. **Journal of Housing for The Elderly.** Center Director Jon Pynoos has been invited to serve as editor for a special issue of the Journal of Housing for the Elderly. The special issue will include several articles on linking housing and supportive services that grew out of a conference in New York City last year sponsored by the Visiting Nurse Service of New York.
12. **Journal of Disability Policy Studies.** Center staff (Nishita, Pynoos, Liebig, Perelman, and Spegal) are revising and resubmitting a journal article entitled "Promoting Basic Accessibility In The Home: Analyzing Patterns In The Diffusion Of Visitability Legislation." The article looks at legislation that requires minimum accessibility in single family homes, began with the passage of an Atlanta ordinance in 1992 and which has spread to other cities and states. The article explores how the visitability concept spread, patterns of diffusion, and controversies in getting the legislation passed. \*(Visit-ability is a movement to enhance the user-friendliness of all new single-family homes to include the needs of everyone, through wise design choices and decisions.

Ordinances often include zero step entryways, wide hallways, and a first floor accessible bathroom.)

13. **American Planning Association**. Center Associate Richard Duncan has been invited to write a section on universal design in an upcoming practice planning manual of the American Planning Association. The manual is tentatively entitled “Planning and Urban Design Standards.”

**F. SUSTAINABILITY**

Center staff have been working on new proposals to expand the Center’s activities and sustain operations.

1. **Communities in Transition: Elder-Friendly Communities in An Aging Los Angeles**.

The Center was informed that the research grant proposal submitted to the Haynes Foundation was not funded. The proposed research was to conduct case studies of two communities in the County of Los Angeles that had been identified as “elder-friendly.”

2. **Project TEACH**.

Project TEACH, or “Training in Environmental Adaptations to Improve Caregivers Health,” funded by the UniHealth Foundation has been developed into a stand-alone educational module for caregivers. Center staff are currently in the process of developing graphics and video segments of before and after examples of home modification.

3. **Small Business Innovation Research Project**.

The Center has successfully revised and submitted a Phase II Small Business Innovation Research (SBIR) Project in association with a Cleveland based design and consulting firm, Innovative Designs in Environments for an Aging Society (I.D.E.A.S.). The purpose of this project is to develop and o a series of online educational modules that provide practical information on home modifications for older adults with sensory, mobility, physical and cognitive impairments.

4. **California Fall Prevention Consortium (CFPC)**. The CFPC has submitted a proposal to the Archstone Foundation for a Fall Prevention Center of Excellence. A public-private partnership, CFPC consists of USC’s Andrus Gerontology Center, the California State University at Fullerton’s Center for Successful Aging, the Veterans Administration Greater Los Angeles Healthcare System Geriatric Research, Education and Clinical Center, and the California Department of Health Services, State and Local Injury Control. The Andrus Center will be the Program Office and responsible for the coordination and oversight of all the functions of the new Center. Jon Pynoos, Ph.D., Laurence Rubenstein, M.D., MPH and Debra Rose, Ph.D. will serve as Co-Directors.

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