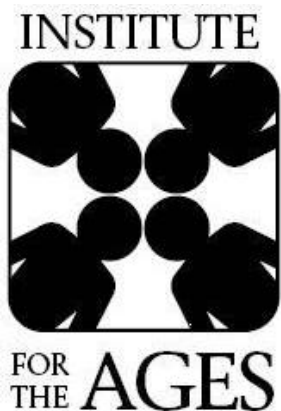


2009



Institute for the Ages



**Kick Off
Meetings
Summary**

July 13 -14, 2009
Presented by SCOPE
7/22/2009

Context

SCOPE has been working to create a national institute that focuses on how a community adapts and evolves to be reflective of its demographics. With nearly 30% of the population age 65 or older, Sarasota County is ahead of the rest of the country in terms of having an older population. We are uniquely poised to be on the leading edge of thought and action with the opportunity to help show the way for communities across the nation. The Institute for the Ages will spur ways to optimize a community's response to a population that is shifting in age. Areas include the physical environment, market research, the development of new products and services, public policy changes, and evolution of our workforce.

SCOPE hired consulting firm RTI (Research Triangle Institute) International to develop the business plan for the Institute for the Ages. RTI is one of the world's leading research institutes, dedicated to improving the human condition. RTI's comprehensive charge is to establish the Institute's vision, determine core programs and set goals for Institute. They will assess market and competitive positions, perform an economic impact analysis, and develop the business design and business model.

In early July, SCOPE hosted five meetings where RTI gathered information. Over 100 interested citizens, medical organizations, local businesses and public officials attended to share their insights and learn about RTI's game plan to develop the business model and business plan for the institute. Community input will help generate the business plan which will provide the basis to attract prospective national funders, both corporate and foundations.

The following document summarizes the key ideas that came out of each of the meetings. In each of the meeting, there were unique themes that emerged, but there was an overarching synthesis of ideas that came out of our conversations. The goals of these meetings was to let people know where we are in the process and to collect thoughts and ideas.

Meeting Summary

INTRODUCTION

Tim Dutton of SCOPE welcomed participants from all over Sarasota County, and then Dan Winfield of RTI gave the history, accomplishments and breadth and depth of RTI International. He then turned it over to Adrienne Brown to walk the group through RTI's process of developing a business plan for the Institute for the Ages. There are four phases to this approach:

Phase I: Establishing Vision, Programs and Goals

Phase II: Market Assessment and Validation

Phase III: Developing the Business Model

Phase IV: Producing the Business Plan, Impact Analysis, Marketing Materials

Please visit the link below to view the presentation for greater detail on the four phased plan.

Institute for the Ages Presentation: <http://prezi.com/129041/>

QUESTIONS FOR RTI

Adrienne asked the group what questions they had about the process she had laid out. The following are questions/comments from the participants.

Meeting Monday July 13th from 11:00 – 12:00

- Q: What is the time frame for the four phased approach?
 - A: This will be a six month process. It of course is dependent on the turnaround of decision points.
- Q: In Phase Four, will the economic analysis be done in conjunction with the Economic Developments Corporations (EDC) five year strategic plan?
 - A: Yes, we will use this data that we collected during the EDC's plan and build upon it with more detailed and granular analysis.
- Q: In Phase One, it seems as though there could be a lack of focus...this could be all over the place, will this be the goal of this group...to focus this phase?
 - A: Yes, this will be part of what we are doing here today. We will use information from the community and will be able to look at research trends and economic development trends in conjunction. The ultimate goal is to narrow down focus and possibly move to another phase of the approach.
- Q: If we can narrow the focus down, this could be a model for the rest of the country?
- Q: Do you consider funding options?
 - A: Yes, phases three and four will look at different funding options. The funding options will also depend on the business model, be it for profit, non-profit or a mixture of both. Also, in phase two, we will be initiating relationships through our contacts and research and interest will be raised.

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- Q: Are there a lot of 'Do Tanks' around the country?
 - A: A combination of the think tank/do tank concept is unique and looking at a community scale is unique.
- Q: What part does the government have to play?

- A: There will be funding from the federal government that we will want to tap into and after the economic crisis, state funding also.
- A: It is also important to link up with important people in the federal government (thought leaders) where we can help to create the research agendas.
- Q: Should we go after local dollars first or federal dollars first?
 - A: Once we know what programs the Institute will offer, we will have a better idea.
- Q: What is the elevator speech you would give about the Institute?
 - A: We will get this speech from the research we are currently doing.
- Q: I think this starts at the federal government and moves down. We need to coordinate the stimulus dollars that are coming from the federal government.
- Q: What is the direction we are trying to go toward? Improve life of seniors or use seniors to improve the community?
 - A: That is what this whole process will help us to decide.

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- Q: Will there be a focus on the social policy side?
 - A: You will decide this.
- Q: Have you addressed the current economic crisis?
 - A: We understand that this will be a key component in our planning. This is why there are built in decision points throughout the process. There should be a focus on the private sector model because of the current crisis.
- Q: Have you considered the use of creative activities (keeping the brain active...) and other things related to design?
 - A: You will decide this.
- Q: How is the open innovation (which is product driven) fit into the institute?
 - A: We envision thinking through a model of say, small working groups that involve people around the community to tackle a problem.
- Q: How do you select the 40 persons that you will interview in phase two?
 - A: Both local and national people will be considered, mostly national. Once we down select the focus areas, we will be able to find the though leaders.

- Q: How will you use community involvement?
 - A: We are here today to get the communities input from the past work the community has done.
- Q: Have you narrowed down the target age group?
 - A: This is about the community as a whole.

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- Q: What is a current Institute that could inform us?
 - A: We have looked at the business models of institutes such as Aspen and ILC. We will continue to look at other institutes during the first two phases
- Q: Longitudinal studies around the world are being siloed. Would RTI be able to make sense of these to approach MNC's?
 - A: Yes – this will do this.
- Q: How do Sarasota's demographics help the think tank? How does it get tapped?
 - A: This is a key component to differentiating the Institute for the Ages.
- Q: We also need to work with the poor elderly. This needs to be inclusive.
- Q: Market Research. This is good because you don't have a homogeneous population in Sarasota. We have a broad base and diverse population (social development) which is important to MNC's.
- Q: The Institute will attract people because of the technology and environment that it will create.
- Q: You have identified over 700 jobs related to medical/life sciences. When you go through the analysis can you drill down to specific scenarios for job creation?
 - A: Yes, we will be able to get to more specifics.
- Q: How have the educators been involved? They are necessary.
- Q: We will need to have youth involved as well with this.
- Q: What is our competitive advantage? Why Sarasota (rather than Arizona or Sun City???)

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- Q: What is the estimated time frame?
 - A: Phase I, II, IV each eight weeks and Phase III six weeks.

- Q: Would you make funding recommendations that are tested?
 - A: Yes. Phase II will start this process and it will be ongoing through the rest of the phases.
- Q: Give us an example of doing something like this before.
 - A: We helped to develop an energy research center that has a lot of the same components.
- Q: Will this be an interactive plan?
 - A: Yes.
- Q: Is the concept more of a research think tank?
 - A: That is a component of it, but there is also a 'do tank' and public policy component.
- Q: Have you experienced push back lately?
 - A: No
- Q: We will want to be broad in our thinking (Verizon, GE, Intel, IBM...) and think outside of the low hanging fruit.
 - A: We are not trying to get to three focus areas but rather have a flexible infrastructure.
- Q: Is one of the components workforce issues? Retirees that work?
 - A: We will determine this from our research.
- Q: Striker, J&J - could we use these companies for seed money?
 - A: No...we need to do the plan before we can go outside of the community.

QUESTIONS FOR PARTICIPANTS

There was one question that RTI asked the participants. What one issue/outcome would you have the Institute for the Ages focus on? The following are the participants' comments.

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- Geriatrics and Gerontology specifics. The number of people trained to handle this (workforce), providing tools for geriatric issues, disseminating knowledge/information related to older adults and their families.
- Clinical research support. Spin offs from the Universities. Establish sources of funding that can support efforts of physicians. Innovation start-ups

- Evidence based studies by students. Publish these statistically valid studies.
- The key to success is mass collaboration.
- Healthcare for seniors. Individual entrepreneurs trying to meet the needs of this population without a lot of contact with experts or evaluation. The Institute could be a focal point or a central location to gather this information. It should be a hub and an incubator. For example, there is work being done in this community around the medical homecare model but they aren't connecting enough to learn from what they are doing. The institute could help coordinate the information gained from this group.
- We need an appropriate model for aging in place – housing and caregiving issues.
- Studies and new devices. The development of manufacturing of these new devices. This would help to bring talented people and money to the area.
- There should also be studies on the dignity of aging.
- First thing is to become a clearing house, not just a duplicator of what is being done well. We could be a referral system.

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- Enhancing the possibilities, whatever the research may come up with. Flexibility to address changes over the years for everybody and not only for those that are “old”.
- Look through different lenses as we look at aging.
- Increase the economic diversity through this institute.
- Medical Seminars. This is already an asset to our community that we can build on. People that give classes would be residents here rather than just visit for a week. We could build professional level staff in this community.
- Market research information that would attract companies from all over the world.
- Aging and Mattering issues
- Aging in Place
- Understanding people at different levels of their lives. There is also a worry on my part about invasion of privacy. Would people want an outside company researching them?
- Intergenerational interaction. Encourage that here and share what we learn to outside of Sarasota.
- Implication in workforce policy

- Volunteer and philanthropy specialty. Cultural, scientific, environmental component to whatever we are talking about.
- Build on our strengths – tourism and the arts.
- Do we have the numbers of older people leaving rather than coming to Sarasota? Are we losing the elderly population?
- Whatever this is, it has to be a business. Funding will have to come from (most likely) the federal government. Priority has been on economic development and the environment. Funding options could realistically be available.
- Looking from multiple prisms. Subjects are also producers/products/... of the Institute.
- Harness the upcoming technology resources to create a dynamic give and take model.

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- Senior housing and elder cohousing. I would like to see the connection between this.
- Innovations of how people are going to eat. Nutrition and food for the community needs to be addressed.
- Intellectual development and growth and knowledge. Addressing how people become better informed.
- Life transition issues
- Intergenerational focus.
- Develop a model for community change. Make a community receptive here to an aging population that can be transferred to outside of Sarasota (e.g. – workforce)
- How to make cohousing work in an existing community.
- Understand the needs and wants of seniors.
- Housing design so it would be useful to the elderly. What type of products would be used in these homes?
- What are the new businesses, companies, products that we could attract?
- Change the attitude that Florida is only to retire – there should be the attraction of professionals.
- The people that are aging that now need to work. Addressing the inability to retire.
- Examine models that have address issues and are working (e.g. – NORC models)

- Caregiving Issues – we are thinking but we need to get the information to the community and we need to take it to the next level.
- An information clearing house.
- Share our information to the nation and the world. We are more than a local/regional source of information.
- Looking at the impact of the aging workforce on business and companies. Even transitioning business to second and third generations)
- Creativity and crating community. How the arts enrich community building.
- Reinventing Retirement. Concepts, vocabulary, activity, needs, want.
- Ideas/projects/programs should be looking at intergenerational implications.
- Neighborhood check for elderly people so they can stay in their homes. Rediscovering Neighborhoods.
- Make sure this goes outside of the community.
- Futuring – committed visioning. Be future focused and disseminate this information. The information could be a product we offer.
- Technology. How do we bridge the gap between age and technology?
- Health Insurance
- Diversity – key component to everything we do...inclusivity. Cultural issues come into play.

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- Aging with dignity concepts. Take away loneliness and feeling of despair. We don't have naturally occurring support systems. What we do see is support systems in mobile home parks.
- Longevity
- Social Planning (Housing/Mobile Homes/NORC's)
- We need to get back the 'half-backs' and keep the population here.

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- An economic model that diversifies our economy!
- Design of products and services
- An active and collaborative effort among profit businesses...and MNC's.

- Forums, symposia, training that will introduce people to Sarasota. It will become a destination place.
- Senior incubator. Seniors re-entry into the marketplace.
- Silver enterprise Zone. Business incentives for retirees.
- Out of the box housing options.
- Engagement of seniors. (politically, employment/volunteer opportunities)
- Transportation models that will fit our community
- Recognition as the leader in the nation in the field of aging.
- Intergenerational
- Clearing house for what's happening already.
- Take local organization to the cutting edge level.
- Innovative structural model that can work with different scales of needs/organization/companies.
- Funding by corporations who have an ongoing need.

Conclusion

The number one thing is to not to think of this Institute too small. There is a potential for this to be a global leader. We have scale on our side.

We have are still working on raising \$50,000 to complete all four phases of RTIs plan. Currently we have enough funds to take us through the first phase and half of the second. To make a pledge to the Institute for the Ages, please contact Suzanne Gregory at sgregory@scopexcel.org or 941-365-8751.

For more information please contact Kim Weaver at kweaver@scopexcel.org or 941-365-8751 or visit our website at www.scopexcel.org