



Increasing access to decision-making support for older adults

Collaborating agencies:
SSA, HHS (CMS, ACL), CFPB

Foundation:
[Discovery Research & Life Experience Charter](#)

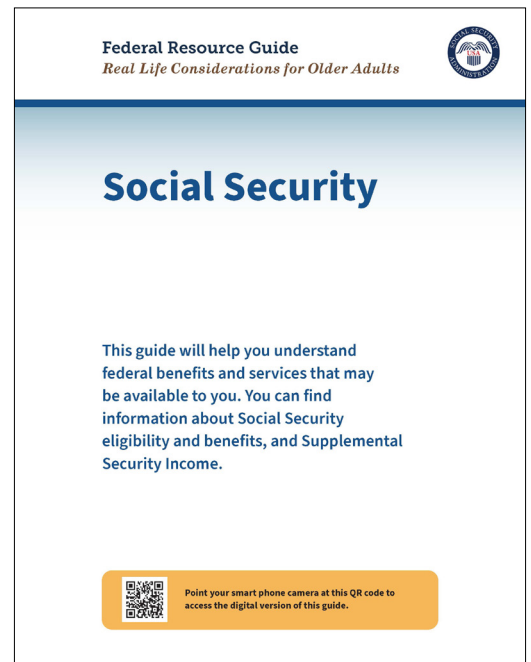
Improving the retirement experience through support from community-based organizations and consolidated information on Federal resources.

The team led the project through a complete design phase, which included designing two concepts to support older adults, their caregivers, and frontline staff: an integrated Federal resource guide and a community of practice. The team developed the concepts from sketches to prototypes throughout nine co-design sessions with national and community-based organizations and 11 cross-agency workshops. The prototypes create a foundation for agencies to transcend separate functions or departments and collaborate in new ways, which should lead to more systemic and customer-centered interventions.

- **The resource guide** consolidates information on resources and benefits from seven agencies to help older adults, caregivers, and frontline staff make informed decisions about healthcare, finances, housing, and nutrition. It consists of modules including Federal benefits and services available, rules and considerations for eligibility, how and where to apply, and where to turn for personalized assistance. The project team developed the content collaboratively with input from HHS (both ACL and CMS), CFPB, HUD, SSA, and USDA. The team completed usability testing with six frontline staff and six members of the public.
- **The Community of Practice (CoP)** is a community of staff who support older adults to connect with Federal staff who work in senior-focused programs. It will center around learning through engagement, with topics that strengthen Federal understanding of how programs can better connect to on-the-ground needs, and will focus solutions on specific outreach challenges or communities that are hard to reach. The project team created a prototype of the Community of Practice and tested it through a desirability survey.

In FY 2024, the Administration for Community Living (ACL) at HHS will lead the pilot phase for both concepts. ACL will launch digital and translated versions of the resource guide and pilot an in-depth pilot with select community-based-organizations. Additionally, ACL will pilot a year of quarterly Community of Practice sessions, hosted collaboratively by Federal agency partners across Government.





Of 310 frontline staff surveyed, 94% strongly agreed or agreed (59% and 35%, respectively), that “participating in this community of practice would better help me serve older adults.” Nobody disagreed.



Cover page from one out of six resource guide prototypes designed to help older adults make informed decisions about healthcare, finance, housing, and food.

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DESIGN PHASE MILESTONES

Milestone	Status	Notes
Conducted a prioritization workshop with community stakeholders, including older adults in underserved communities, to determine key areas for improvement.		Completed. The project team organized two co-design sessions with a diverse group of stakeholders. From the local level, there was active participation from 20 community-based organizations representing diverse underserved communities from across the country. On the national level, there was participation from 12 national non-profit organizations.
Developed a design and evaluation plan to determine the effectiveness of connecting older adults with retirement resources.		Completed. The project team identified a testing cohort of nine community-based organizations to codesign and test materials. The organizations represent diverse underserved communities from across the country.
Tested model intervention.		Completed. Resource guide: Completed initial usability testing with six members of the public and six practitioners from social sector organizations. Community of practice: Completed a desirability survey with 310 frontline staff at local and national organizations.
Assessed results, developed a recommendation for scaling the model intervention for a pilot, and provided a summary of results.		Completed. The project team transitioned the community of practice to the Administration for Community Living (ACL) in the Department of Health and Human Services. ACL will pilot the Federal resource guide.

DESIGN PHASE PROJECT MEASURES

Design Phase Measure	Assessment Approach & Data	December 2023 Status
Reduction and streamlining of existing content, including new support touchpoints that offer financial resources and information in tandem with health and/or retirement benefits support.	Usability testing with members of the public and frontline staff of organizations serving older adults.	The draft resource guide consolidates information from seven agencies in modules about taxes, food resources, debt and loans, housing assistance for homeowners and renters, and Social Security.
NEW: Resource guide is easy to use.	Usability testing.	Interviews with six members of the public and six practitioners from social sector organizations serving older adults to inform improvements to the guide.
NEW: Community of Practice is a useful concept for frontline staff.	Survey administered via the National Council on Aging, the Association of Service Coordinators, ACL Regional Administrators, and ACL's Office of Healthcare Information & Counseling (State Health Insurance Assistance Program / Medicare Improvement for Patients and Providers Act / Senior Medicare Patrol Programs).	Of 310 practitioners from social sector organizations surveyed, 94 percent strongly agree or agree (59 percent and 35 percent, respectively) that "Participating in this community of practice would better help me serve older adults." Nobody disagreed.
Older adults who use the prototype have increased confidence in their retirement and healthcare (including Medicare) choices, and find the decision-making supports clear and useful.	To be determined.	Too early to assess.
Improve experience measures such as trust and satisfaction in sample populations compared to people not using the supports.	To be determined.	Too early to assess.



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Project Summary

The project will facilitate a community stakeholder-centered design process to build and test an information and outreach model to help older adults make informed retirement and healthcare decisions through connections to trusted community-based resources.

Customer pain point:

Many older adults, particularly those with lower incomes or who continue to work into older age to cover their expenses, have difficulty finding objective decision-making support resources to help them understand and navigate the interconnections between retirement benefits options, their financial situations, and their health outlooks.

Project Objectives

The project aims to increase the accessibility and availability of holistic resources at existing touchpoints (such as community-based organizations); raise awareness about local resources; and reduce the burden on older adults as they are making retirement and healthcare decisions. As a result, individuals will more easily determine the correct steps for their situations.

Target milestones in 2023 include:

- Conduct a prioritization workshop with community stakeholders, including older adults in underserved communities, to determine key areas for improvement
- Develop a design and evaluation plan to determine the long-term effectiveness of connecting older adults with retirement resources
- Conduct intervention testing of a model
- Assess results and develop a recommendation for scaling the model intervention for a pilot

Primary deliverables in 2023 include:

- Concept prototype
- Implementation plan for increasing access to decision-making support for older adults in underserved communities
- Summary of findings from the intervention pilots
- Operations plan proposal for expanding the intervention, including recommendations to agencies on eliminating redundancies or improving existing content

Measures of Success

Key outcomes:

The project's success is defined by its ability to reduce customer navigation burden and duplicative processes, connect older adults to streamlined information available across a variety of Federal agencies and programs, and improve the ability of older adults to make informed choices that work for them.

Design phase project measures:

- Reduction and streamlining of existing content, including new support touchpoints that offer financial resources and information in tandem with health and/or retirement benefits support
- Older adults who use the prototype have increased confidence in their retirement and healthcare (including Medicare) choices, and find the decision-making supports clear and useful
- Improve experience measures such as trust and satisfaction in sample populations compared to people not using the supports