2. COMMUNITY PROCESS + METHODOLOGY

PROJECT HISTORY

For many years, community members and organizations, including the Senior Citizens Support Services Incorporated (SCSSI), a nonprofit based in Juneau focused on senior issues, have been thinking about the future needs for seniors in Juneau as the baby boomers retire and demand for housing and services increases. In 2010, the Juneau Commission on Aging conducted the third in a series of senior surveys that have occurred approximately every 10 years. The 2010 survey identified assisted living as one of the main gaps in senior services and housing in Juneau.

In June 2013, a volunteer group of local citizens, including Juneau Economic Development Council (JEDC) staff, held a public meeting to provide information about the lack of senior assisted living in Juneau and to assess the community's interest in solving the problem. Approximately 120 people attended this meeting and soon after the Juneau Assisted Living for Seniors (ALFS) Task Force was created. In August 2013, Retirement Housing Foundation (RHF), a non-profit organization that develops and manages senior housing and assisted living across the nation, visited Juneau for three days and met with the community to discuss assisted living and senior housing options.

In January 2014, the Juneau ALFS Task Force merged with SCSSI to gain 501(c)(3) status and to expand opportunities for collaboration and funding to establish senior assisted living and to further address other senior housing and service needs. Also in 2014, the JEDC in collaboration with the ALFS Task Force and SCSSI developed a Request for Proposals (RFP) for a market demand study to help quantify demand for assisted living in Juneau. In response to the RFP, Agnew::Beck Consulting, LLC, in collaboration with Northern Economics, Inc., was selected to prepare this demand forecast.

Figure 2-1: Juneau Assisted Living Project Timeline

As shown in Figure 2-1, the demand forecast builds from the previous 2010 Senior Needs Assessment to quantify the level of demand for assisted living in Juneau. A community meeting in July 2014 was part of this demand forecast and included approximately 120 community members who provided input on assisted living and senior services through small group activities and keypad polling. Project next steps include feasibility assessment and ultimately design and construction.

METHODOLOGY

This study utilized four research methods: analyzing state and private datasets, conducting key informant interviews and case study research, hosting a community workshop with audience polling, and reviewing previous studies to develop a demand forecast for assisted living, along with recommendations for next steps.

Figure 2-2: Methodology
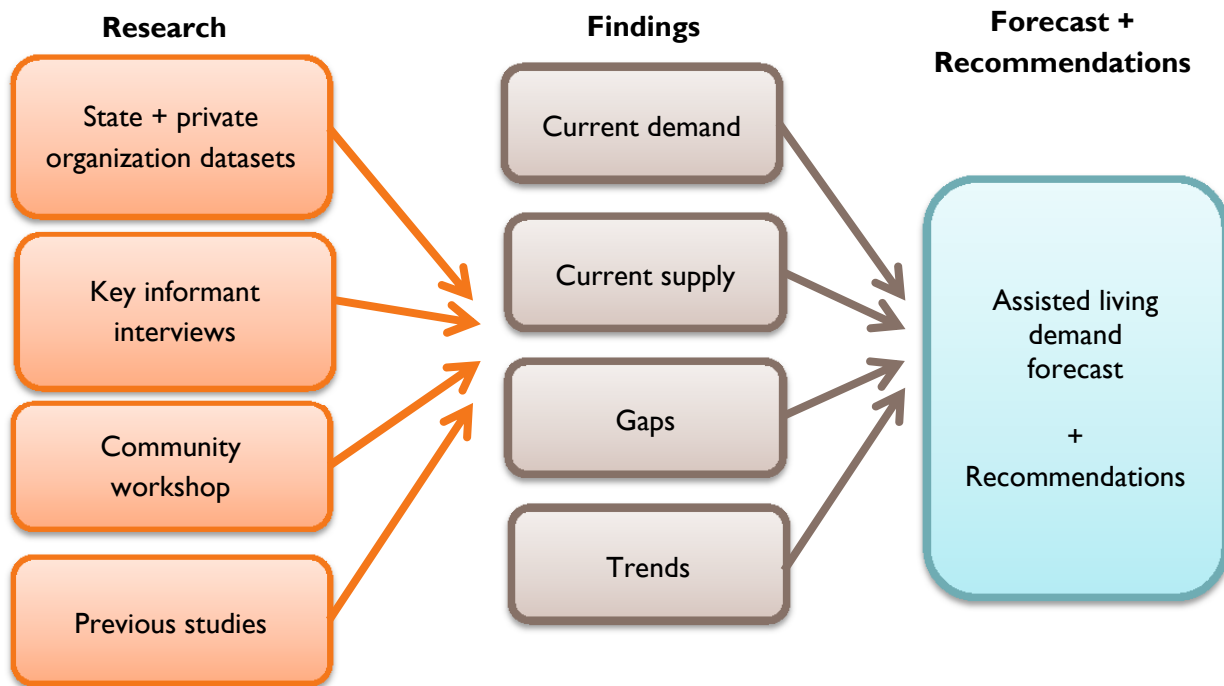
DATA SETS + PREVIOUS REPORTS

The consultant team used population projections for the senior age categories in Juneau from the Alaska Department of Labor and Workforce Development (DOL&WD). Additional data sets from state and federal sources were analyzed, such as migration trends, income, health, and current use of senior housing and services. Private organizations also provided service utilization data. The full list of data is included as Appendix A.

The Juneau Senior Needs Survey is conducted every ten years to understand demographics, use patterns, needs and preferences of Juneau seniors. This survey as well as the 2012 Juneau Housing Needs Assessment, various organizations' annual reports, and statewide long-term care planning documents also informed the forecast and conclusions in this report.

KEY INFORMANT INTERVIEWS

Agnew::Beck conducted approximately 30 interviews with key informants knowledgeable about senior housing and services in Juneau and Alaska. Figure 2-3 shows the key informants by category.

This full list of interviewees and organizations is included in Appendix B. In addition, Agnew::Beck also conducted several shorter interviews to understand comparable assisted living facilities in and out of the state of Alaska. The comparable facility matrix is included as Appendix D.

Figure 2-3: Key Informant Interviews

Case Studies
Haines Assisted Living
Fireweed Place
Juneau Pioneer Home
Primrose Retirement Community
Raven Landing
St. Vincent de Paul
Wildflower Court
Retirement Housing Foundation
Mountain View Manor in Petersburg,
Assisted living homes in Galena, Dillingham, Barrow, Ketchikan, Anchorage (Wesleyan House, Shalom House and Marlow Manor), Park Place in Seattle and The Forum in Tucson, Arizona

Services
Catholic Community Services, Southeast Senior Services
Cornerstone Home Care
Southeast Alaska Independent Living (SAIL)
Priority Health Care

Policy/Leadership
Alaska Housing Finance Corporation
Alaska Department of Health and Social Services, Senior and Disability Services
Juneau Commission on Aging
University of Alaska Southeast
Southeast Alaska Regional Health Consortium (SEARCH)
Tlingit Haida Regional Housing Authority
Central Council Tlingit & Haida Indian Tribes of Alaska Elder Caregiver Council
City and Borough of Juneau
State of Alaska, Department of Health and Social Services, Division of Pioneer Homes

COMMUNITY WORKSHOP

Approximately 120 people attended a community workshop on July 29, 2014 to learn about the project and express their preferences for assisted living and other senior housing options and services in Juneau. A key feature of the workshop was live audience polling, during which participants responded to questions posed to the group using individual keypads. Participants were from the greater Juneau area, with the largest number coming from Downtown/Willoughby District (27 percent) and around 10 percent coming each from the Mendenhall Valley, West Juneau, Douglas and Twin Lakes. The balance came from near the airport, Auke Bay, Lemon Creek, out the road, or other locations. Eighty-four percent of participants had lived in Juneau more than twenty years. Approximately, two third of participants were female. Seventy-eight person of participants at the workshop indicated household income of more than $60,000 annually and one-third of participants had household incomes of between $100,000 and $150,000 annually. This indicates that participation at the workshop was well represented by higher income households. Outreach to lower income seniors and households is important as the community process to consider senior housing, services, and assisted living continues.

Age brackets were relatively well represented for a senior study; around 30 percent were between the ages of 51 and 59 and 24 percent were between the ages of 65 and 70. Figure 2-4 shows the ages in attendance. Seventy five percent of participants currently live in single-family homes, 61 percent live with a spouse or partner, and 21 percent were looking for new living situations.

Figure 2-4: Ages Represented at the Juneau Senior Housing Workshop, July 2014
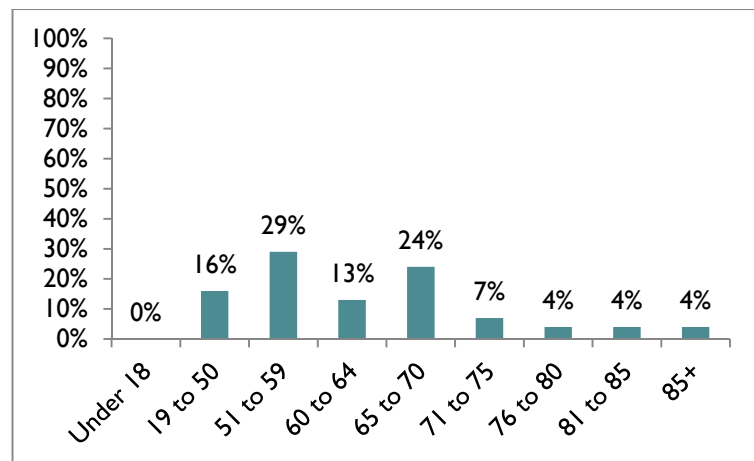
3. DEMOGRAPHICS

HISTORICAL + PROJECTED POPULATION

With just over 33,000 people, the City and Borough of Juneau serves as Alaska's state capital and southeast Alaska's regional service hub. Figure 3-1 shows the historical and projected population trends for both Juneau and the southeast region.[4] According to the April 2011 edition of Alaska Economic Trends, a publication of the Alaska Department of Labor and Workforce Development (DOL&WD), employment and population are closely tied and over the past quarter century, have steadily grown in Juneau. In 2012, federal, state and local government accounted for 40 percent of all jobs in Juneau, with state jobs making up about one-half of the government jobs in Juneau. The next largest sectors in terms of employment after government jobs are trade, transportation, and utilities (18.5%) and education and health services (9.9%). While still largely influenced by government employment, the Juneau economy has diversified over the last decade as federal, state and local government jobs have declined due to budget cuts and employment in mining and tourism has increased.

Figure 3-1: Historical + Projected Population (All Ages)
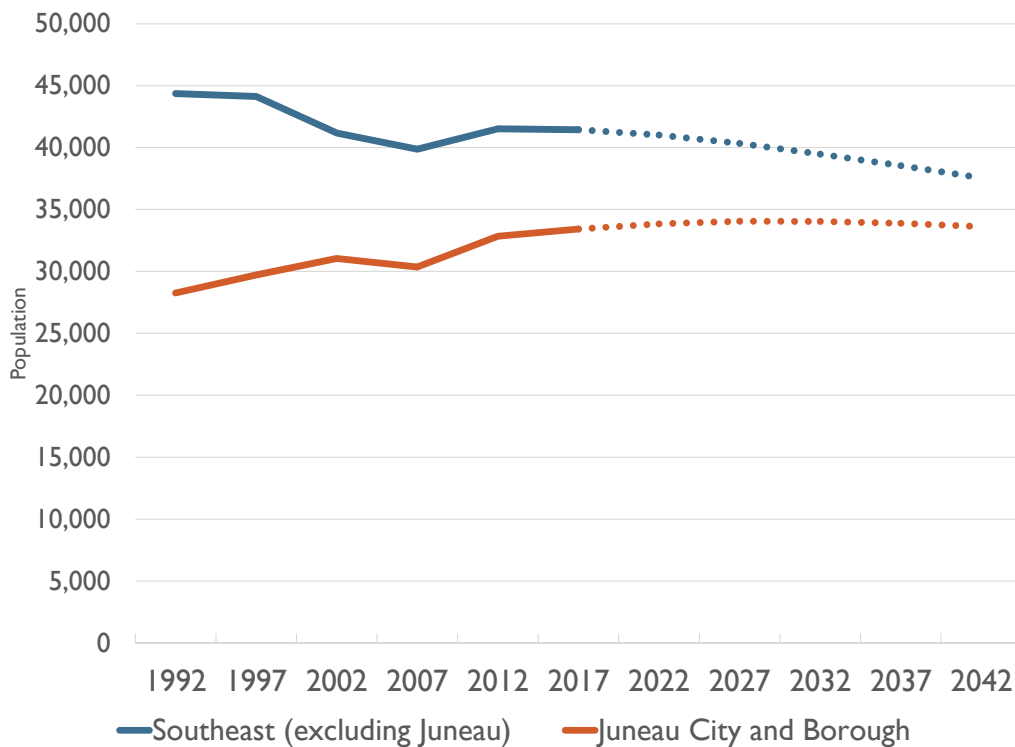
Source: Alaska Department of Labor and Workforce Development, 2014

---

[4] Southeast region includes: Haines Borough, Hoonah-Angoon CA, Ketchikan Gateway Borough, Petersburg Borough, Prince of Wales-Hyder CA, Sitka City and Borough, Skagway Borough, Wrangell City and Borough, and Yakutat City and Borough Note: CA=Census Area.

While government jobs have contributed to a steady population base in Juneau, population in the rest of the southeast region has steadily decreased over the past quarter century. Population projections for Juneau suggest small continuous growth through 2027, with a small decline happening in 2032. Southeast region population, excluding Juneau, is expected to gradually decrease over the horizon of the forecast.

SILVER TSUNAMI

The "Silver Tsunami" refers to the aging of the baby boomer generation, which is a trend affecting communities across the United States. In Juneau and the southeast region, the proportion of the senior population grew steadily from 1990 and, in recent years, experienced substantial growth (Figure 3-3). This increase in the proportion of seniors will continue at a rapid rate over the next 30 years as Juneau, Alaska, and the United States as a whole begin to see the baby boomers born directly after World War II (1946-1964) reach retirement age. As shown in Figure 3-2 and Figure 3-3, the senior population over age 65 in Juneau is projected to peak in 2032

Figure 3-2: Current + Future Senior Population, Juneau

Age Cohort	2014	2022	2032	2042
65 to 74	2,338	3,824	3,401	2,384
75 to 84	775	1,425	2,785	2,469
85+	285	359	706	1,393
Total 65+	3,398	5,608	6,892	6,246
65+ as % of Total Population	10%	17%	20%	19%

Source: Alaska Population Projections, DOL&WD, April 2014. 2014 estimated based on DOL&WD average annual growth between 2013 estimate and forecast for 2017

at 20 percent, with 6,892 seniors. Currently, there are about 3,398 seniors age 65 or older up from 2,000 just ten years ago. The southeast region expects to have an even higher proportion of age 65 and older at nearly 25 percent. However, after 2032, as the baby boomers pass away and the population age 65 and older will begin to decline.

However, as shown in Figure 3-2 and Figure 3-4, growth in the 75 to 84 year old age cohort is expected to continue until 2037 and the 85 and older age group will continue growing beyond the end of the forecast time period. Those 85 and older tend to require the highest level of long-term services and supports as they age. Currently, there are approximately 285 seniors 85 and older in Juneau. By 2042, that number is expected to increase to about 1,393.
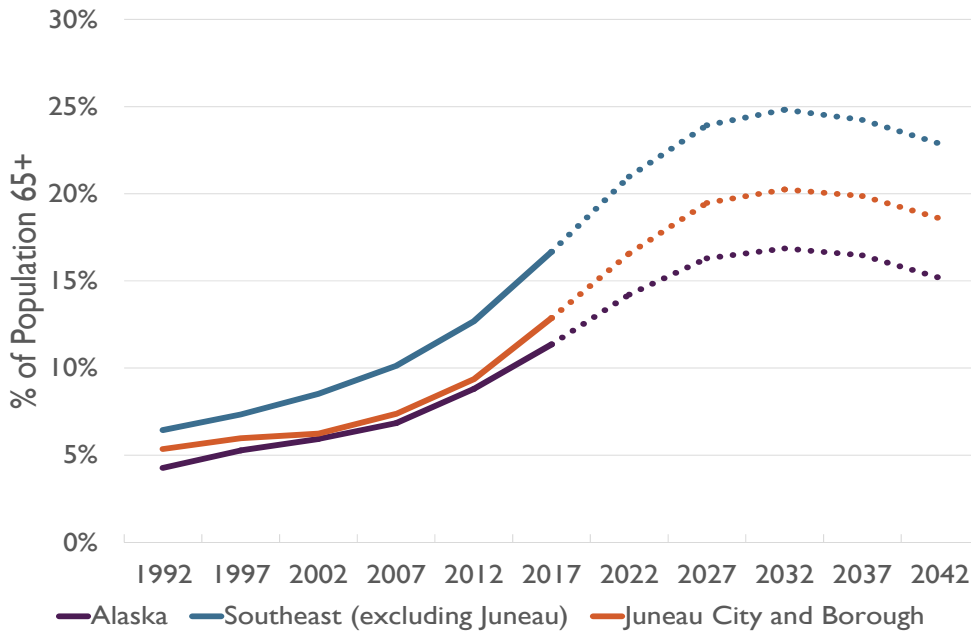
Aging seniors will demand different housing choices and will need additional services as they age. The aging population is a substantial demographic shift that requires planning and consideration to ensure adequate and appropriate levels of care are available for seniors as they age. While it is expected that the high proportion of seniors will eventually decline as the baby boomers pass away, the impact of the Silver Tsunami will be felt until at least the mid-2050s when the youngest baby boomers reach their nineties, which is 40 years from now.

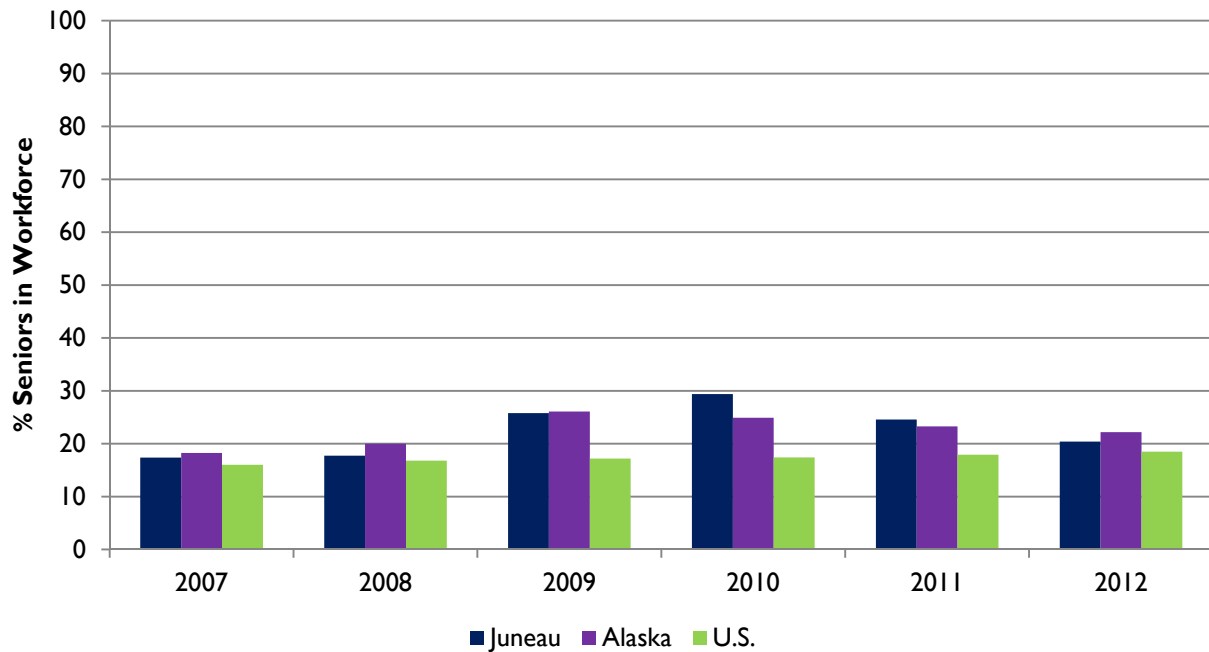Figure 3-3: Percent of the Population Age 65+

Source: Alaska Department of Labor and Workforce Development, 2014

Figure 3-4: Age Distribution of the 65+ Population in Juneau
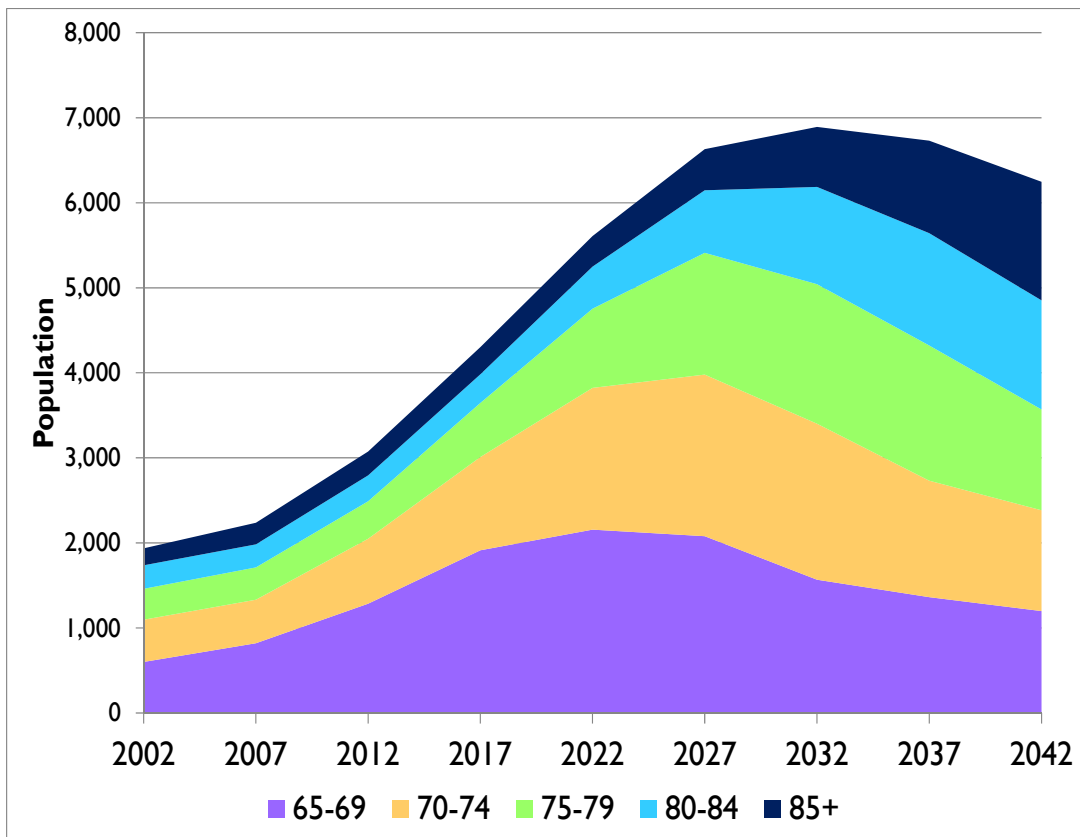
Source: Alaska Department of Labor and Workforce Development, 2014

Figure 3-5: Senior Participation in the Labor Force

Source: American Community Survey 2012 3-year estimates

LABOR FORCE PARTICIPATION

Juneau seniors tend to participate in the labor force at rates equal to or higher than other seniors in Alaska and the United States do. In 2012, around 20 percent of seniors age 65 and up were working. The trend towards workforce participation in Alaska peaked in 2010, perhaps in response to the national recession.

RETIREMENT STATUS

Currently, 63 percent of those age 65 and older in Juneau are enrolled in the Alaska Public Employees' Retirement System (PERS) or the Teacher Retirement System (TRS) for a total of 2,054 PERS/TRS retirees. This is down from 77 percent in 2000 but is still a substantial share of the aging population in Juneau. In contrast, 30 percent of the 65 and older population nationally receives income from a pension or a 401K retirement plan. PERS and TRS have different tiers of retirement that are either defined contribution plans or defined benefit plans, depending on the system and tier. Tiers 1, 2, and 3 are defined benefit and Tier 4 is a defined contribution plan. A defined benefit plan provides a set amount of income per month based on years of service and salary while employed at a public agency. Currently, all PERS and TRS retirees in Juneau are Tier 1, 2, or 3 and subsequently all have a defined benefit pension. The defined benefit pensions provide 63 percent of Juneau seniors with a stable source of revenue into retirement.
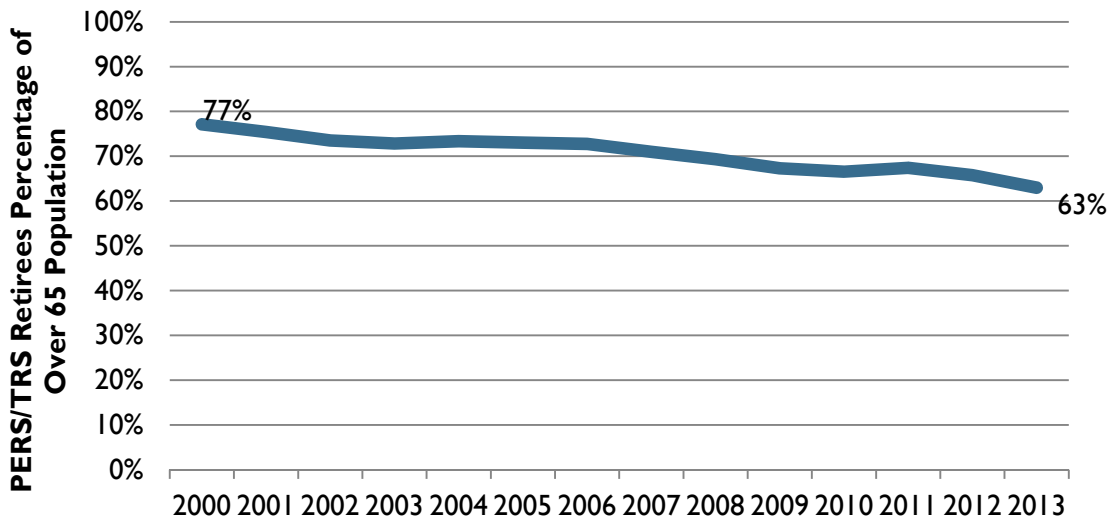
Figure 3-6: Total Number of PERS + TRS Retirees in Juneau
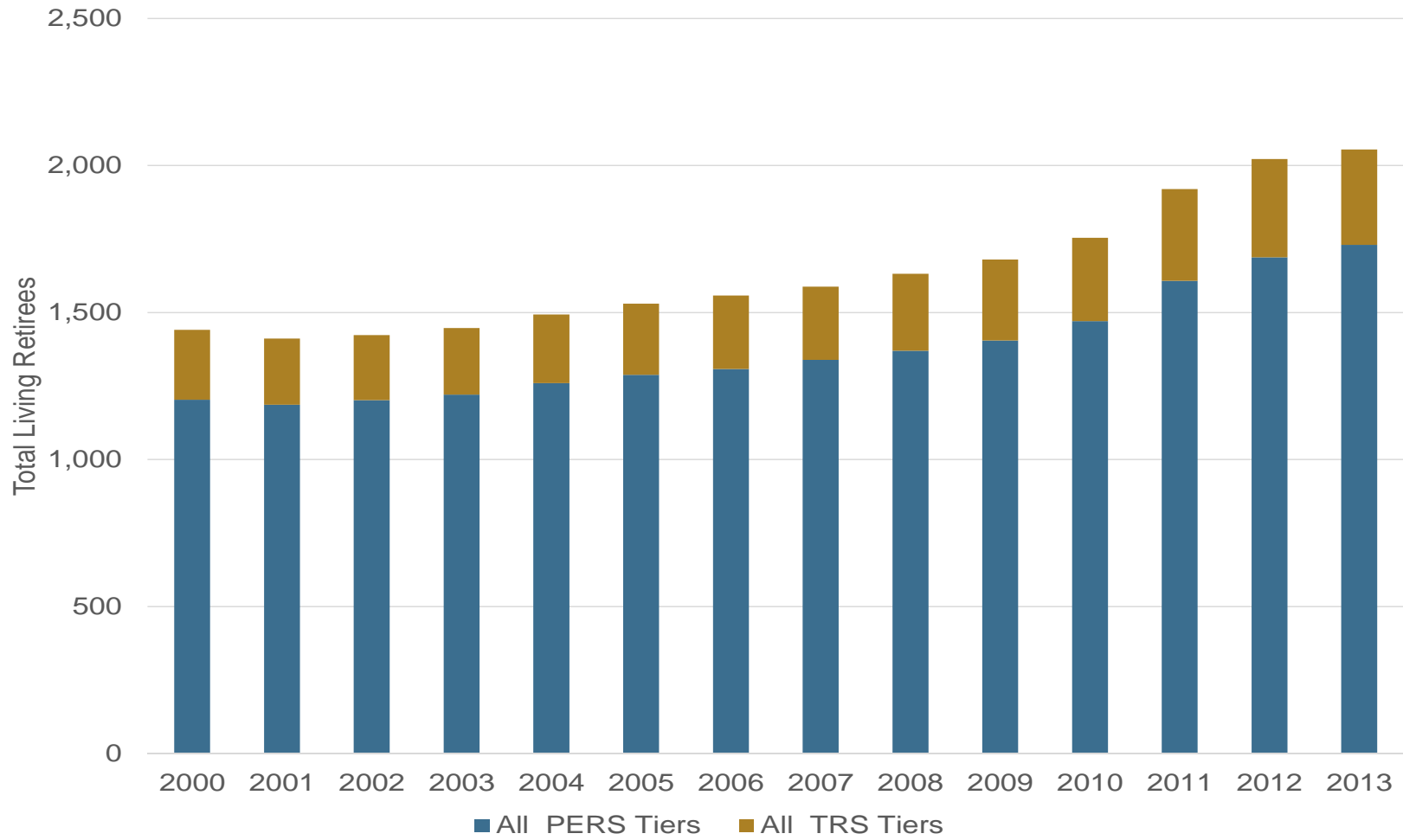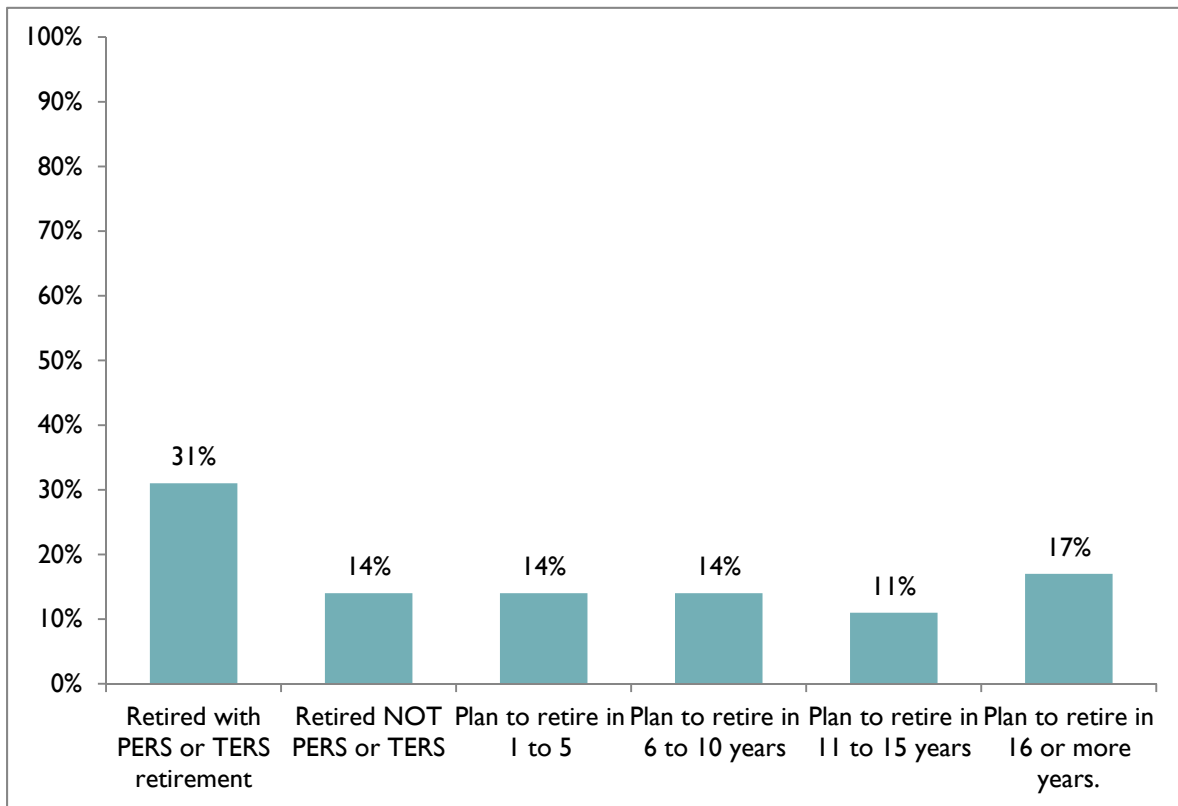

Source: State of Alaska, Department of Administration, Division of Retirement and Benefits, 2014

Figure 3-7: Percentage of 65+ PERS / TRS Retirees in Juneau

Source: State of Alaska, Department of Administration, Division of Retirement and Benefits, 2014

Figure 3-8: July 2014 Community Workshop Participants Retirement Status

Close to one third of participants at the July 2014 workshop were retired with a PERS or TRS retirement and another 14 percent had a retirement that was not PERS or TRS.

The Department of Administration at the State of Alaska does not provide forecasts for future retiree levels. In the future, it is likely that PERS and TRS retirees will continue to represent a large share of the senior population, although their share is likely to continue to decrease as those with private sector employment status retire. Ultimately, when the Tier 4 retirees begin to retire the stable source of retirement income for Juneau retirees may decline depending on how individual retirement accounts perform.

MIGRATION TRENDS

Demand for senior services and housing is subject to the potential for Juneau seniors to retire and move elsewhere. To understand the extent to which this trend could occur, a range of migration data was analyzed. Migration data compares the number of people leaving a particular location to the number of people moving into that same location to calculate a net migration number. Net in-migration is a positive number and it means that more people moved to a location than left that location. Net out-migration is a negative number and means that more people left a particular location than moved to it.

The DOL&WD population forecasts by age take into account historical migration patterns, as well as births and deaths when forecasting future population levels. As a result, migration patterns are already built into the senior forecast for Juneau and these were reported earlier in this chapter. However, a closer look at migration patterns provides a more complete picture regarding where people are going, where they are coming from and how many are staying. To do this, three data points on migration were evaluated: migration patterns for all ages by location, migration patterns by age (does not show location) and migration patterns for PERS and TRS retirees (shows location).

The key finding from this analysis is that net migration among PERS/TRS retirees and those age 65 and older (includes PERS/TRS retirees as well as other seniors), has been negative but has been relatively small, at 2 and 6 percent of the total senior population. Approximately 44 seniors over age 65, on average per year from 2008 to 2012 migrate out of Juneau, while 74 PERS/TRS retirees on average from 2000 to 2013 migrate out of Juneau. Because these migration numbers reflect a small percent of the overall senior population, the data indicates that the majority of retirees are staying put in Juneau. Additionally, the 2010 Juneau Senior Needs Survey conducted by the Juneau Commission on Aging included a question that asked seniors if they planned to stay in Juneau indefinitely. The survey recorded response variables for 1,165 seniors and the responses indicated that 87 percent said they would stay in Juneau indefinitely. So far, current and historical migration data confirms that people are doing what they said they would by choosing to stay in Juneau. Other key findings from the migration analysis are listed below.

- More residents come to Juneau from southeast Alaska (97 per year on average) than leave for southeast Alaska.
- More Juneau residents (96 on average per year), as well as PERS/TRS retirees (3 on average per year), leave for southcentral Alaska than come to Juneau from southcentral.

- More Juneau residents (200 on average per year), as well as PERS/TRS retirees (70 on average per year), leave for locations out of state than come to Juneau from locations out of state.

Potential demand is also influenced by seniors in neighboring communities moving to Juneau for services and housing. Currently, migration trends show more people are moving to Juneau from southeast. This trend could increase, particularly for seniors if a new assisted living and senior independent housing community was developed in Juneau. Detailed tables on migration are included in Appendix C.

HEALTH STATUS

Planning for future senior housing and services in a community like Juneau is critical but difficult to do because the types of services and supports required are ultimately a function of an individual senior's health condition and the level of care they require. Anticipating the future health conditions of Juneau seniors with any precision is difficult; however, there are some national and state trends to help understand the potential health status of aging seniors.

People are living longer. Life expectancy in the United States has risen to 78.9 years from 69.9 in 1960. Similarly, in Alaska, life expectancy has increased from 72.1 in 1980 to 78.1 currently. Women tend to live longer than men with a life expectancy for women at 81.2 years versus 76.4 for men, nationally.[5]

Rates of Alzheimer's increase with age. According to the national Alzheimer's Association, 3 percent of people age 65 to 74 have Alzheimer's and that rate increases to 46 percent for those 85 and older. These rates are considered conservative because they do not include other related dementias. Additionally, Alzheimer's disease and Related Dementias (ADRD) diagnoses are typically underreported because individuals may die from other conditions that are reported on death certificates. Using the rates published by the national Alzheimer's Association and applying those rates to DOL&WD population projections for Juneau provides an estimate of the number of seniors with Alzheimer's disease over the forecast time period. The results are shown in Figure 3-10. Juneau can expect just over 1,000 seniors with Alzheimer's by 2042 up from about 322 today. The 85 and older population will likely increase from about 135 seniors with Alzheimer's to approximately 647 seniors 85 and older with Alzheimer's by 2042.

Figure 3-9: Alzheimer's Disease Rates by Age (Alaska)
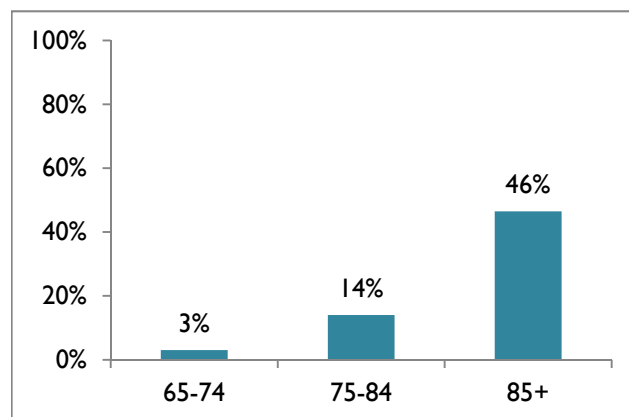
Source: Alzheimer's Association, 2014 Alaska Alzheimer's Statistics

---

[5] World Bank and Alaska Department of Labor & Workforce Development

Figure 3-10: Estimated Number of Seniors with Alzheimer's Disease, Juneau

| Age Cohort	2014	2022	2032	2042
65 to 74	73	91	103	72
75 to 84	114	136	390	346
85+	135	148	328	647
Total 65+	322	376	821	1,065

Source: Based on State of Alaska Alzheimer's rates by age cohort and Alaska
Population Projections, DOL&WD, April 2014.

Reports indicate that older Americans have more chronic conditions. According to the Centers of Disease Control (CDC), the rates of people age 45 to 64 and over 65 who reported prevalence of two or more of the nine chronic conditions are increasing. As shown in Figure 3-11, this trend is occurring in both men and women. Chronic conditions include hypertension, heart disease, diabetes, cancer, stroke, chronic bronchitis, emphysema, current asthma, and kidney disease.

In terms of synthesizing data on health conditions for long-term care planning, the result is mixed. Communities must prepare for more seniors, many of whom have chronic conditions and an ADRD diagnosis, increasing the potential they will require intensive services as they age. At the same time, people are living longer and many people remain active. Communities will need to plan for a mix of seniors; some of whom are active and healthy and may be interested in retirement communities or in downsizing to smaller housing types; others will require more intensive services either in their home, in assisted living, and in skilled nursing facilities and hospitals.

Figure 3-11: Prevalence of Two or More of Nine Chronic Conditions Has Increased
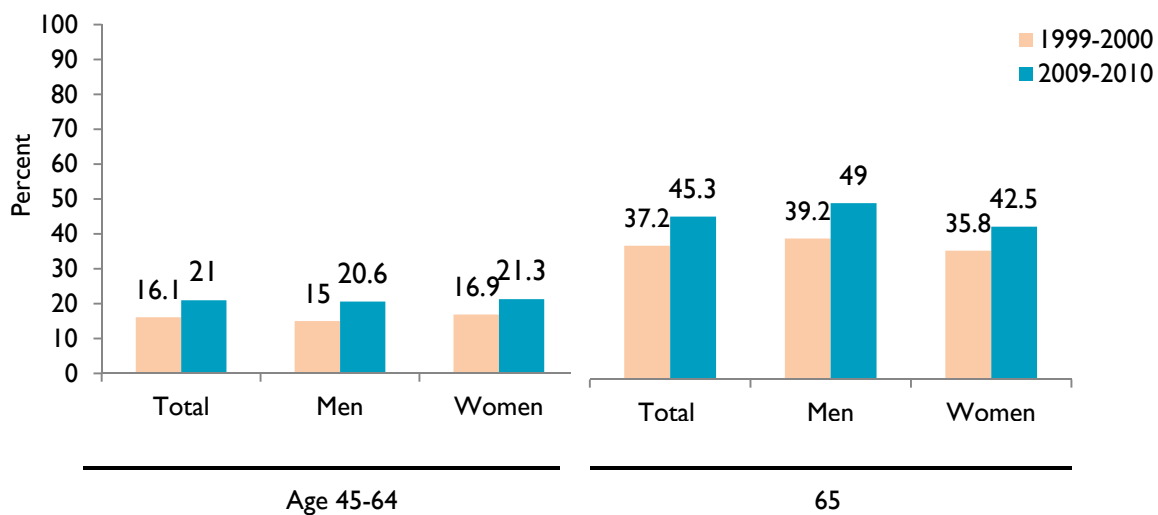
Chronic conditions include hypertension, heart disease, diabetes, cancer, stroke, chronic bronchitis, emphysema, current asthma, and kidney disease.
Source: CDC, National Health Interview Survey, July 2012