Commission on Aging
Retreat Notes

Friday October 30th 2026 9 am-3.30pm

OPENING REMARKS TO PARTICIPANTS AND GROUND RULES
Lauren Elkin, MCCOA Chair, opened the meeting an welcomed everyone and reviewed the Commissions expectations on public and member participation, respectful dialogue, public comment process, the importance of active listening, actions that cause distress in a meeting that will not be tolerated including various forms for disruptive behaviors and communication issues (blame shifts, passive aggressive body language, dismissive language, yelling, dominating discussions, use of cell phones during meetings, sidebar discussion while others are speaking), procedural and structural challenges (staying focused on agenda and bringing up the same point over and over again).

The Chair emphasized to everyone that the key focus was to clarify our roles and relationships, determine what the participants collectively see as successful outcomes, identify key topics and actionable goals or support older adults, older adults with disabilities, and caregivers based on the foundational principles of:

1. Collaboration - Building and fostering partnerships within the community and agencies to strengthen stronger collaboration, partnership, support, engagements, transparency, understanding, and actionable outcomes.

2. Transparency - Supporting systems and processes that are data based, sustain transparent decision-making processes, and share metrics and progress with all stakeholders.

3. Enhancing Outcomes - Strengthening program performance tracking, data collection, and information sharing to increase data-driven decisions that enhance actual outcomes for older adults.

4. Communication - Establish consistent processes for the clear exchange of information on current issues, concerns, priorities, and activities to support older adults with government agencies and their representatives, organizations who are supporting older adults, and the community by:

    A. Expressing our message simply and directly without adding confusing or unnecessary details,

B. Choosing precise words, sticking to the main point, ensuring our core idea is easy to grasp,

C. Utilizing active listening to understand and respond to insights and comments from others.

D. Recognizing the older adult segment has distinct segments that may require special consideration and adjustments to successfully reach each segment with clear, concise, concrete, complete, understandable, and relatable communication.

5. Goals & action plans are clearly defined and actionable

6. Recognize in our discussion there are four basic groups of older adults who are part of the older adult continuum and:

   A. Successfully navigating

   B. Facing some challenges navigating

   C. Having difficulty navigating, and those

   D. Unable to navigate.

He advised the members the November meeting focus would be about our strategic plan recommendations, and the AAA presentation would be rescheduled to January.

He thanked everyone for being part of this ongoing effort to ensure older adults' needs are supported and funded. He also extended his thanks to our guide today, Barry Phegan, for being a part of this important discussion and commitment process.

Summary of Meeting Approach:
Barry Phegan reviewed the process with the members and engaged the members in a game to have each person find out one thing about them that was on a list of items. The process forced every member to talk with other members and learn something special about them. Exceptionally well received and was identified as an excellent ice breaker that should be used in the future.

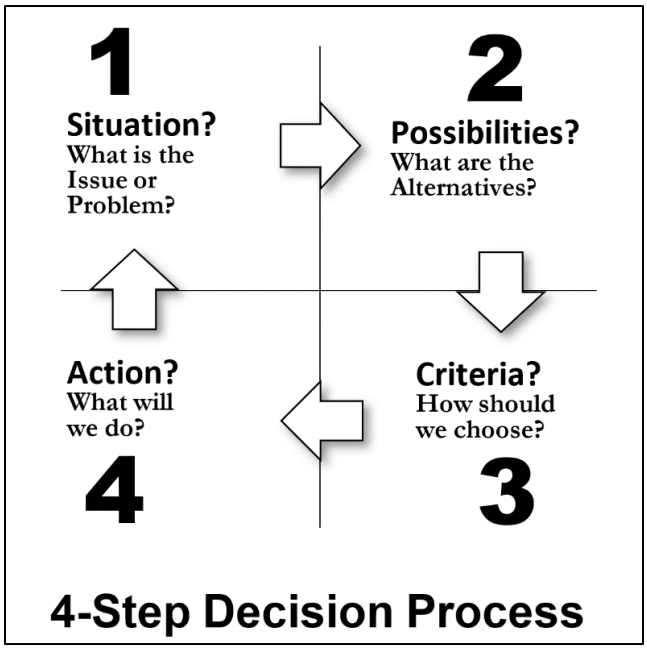
The meeting is divided into three segments (roles & relationships, successful outcomes, and determining goals and actions to support these goals. The decision process will involve first looking at the situation, then the possibilities, then selecting and degerming an action plan for each item.

1. **Roles and Relationships**:
   a. How can we improve our relationships with each other, with staff, with the community, appointing groups, and County Supervisors?
   b. How do we make Commission meetings more involving, engaging, and effective, with clearer outcomes and follow-through?

c. How can we clarify staff and commission roles and responsibilities, so we work better together as commissioners, staff, and County Supervisors?

2. **Successful Outcomes**:
   a. What does “success” look like?
   b. How might we measure our success or results?
   c. How do we balance advocacy, recommendations, education, and actions? How do we gain support from within the Commission, community, and government agencies to support success?
   d. How can we make our advocacy and advisory roles more effective, so they lead to successful action? What is our strategy to recommend and support success?

3. **Topics and Goals**:
   a. What do we see as the key age-related issues or topics?
   b. What age-related issues or topics should we focus on during the coming year?
   c. What is our action plan for 2027?
   d. What are our goals and how will we assess progress?



Morning Work Session

Afternoon Work Session

TOPIC 1 - ROLES AND RELATIONSHIPS

Issues (Roles & Relationships)

EXTERNAL (Roles & relationships)

1. Older adults are not a priority
2. Unclear expectations
3. Not open to new ways, too rigid
4. Inability to apply general goals to our communities
5. No communication with community
6. No space to share what we are doing in our community
7.

INTERNAL (Roles & Relationships - Meetings & culture)

8. How we communicate internally
9. Roles are not clear - advisory +
10. Recruitment and admission of potential commissioners
11. How we are onboarding new commissioners
12. Not assuming the best intent
13. Come to meeting with biases and/or personal agendas
14. Side distractions, tangents in meetings, not staying on topic
15. Individuals being disrespectful
16. Discussions are too long and get off point
17. Commissioners don’t all come prepared to meetings
18. Disconnected from older Americans act and the intentions of the county advisory commissions
19. Disconnected from supervisors

TOPIC 1 - ROLES AND RELATIONSHIPS

Possibilities (Roles & Relationships)

EXTERNAL (Roles & relationships - Possibilities)

1. Repository of information / portal
2. Get out to community

3. Find out what others are doing, best practices
4. Report back on Board of Supervisor's actions
5. Newsletter

INTERNAL (Roles & relationships Possibilities - Meetings & culture)

6. Review recruitment and selection process of town and district appointees
7. Work on onboarding process
8. Mentor system for onboarding
9. Joint commission and staff onboarding team
10. Have staff explain OAA and Roles
11. Commit to communicating with appointed entity and community and supervisors
12. Use curiosity listening
13. Building strong relationships between AAA staff and commissioners
14. Intentional effort to strengthen staff and community relationships

TOPIC 2 - SUCCESSFUL OUTCOMES

Issues (Successful outcomes)

EXTERNAL ISSUES (Successful outcomes)

1. Partner with other agencies and organizations
2. Age friendly to be used as model
3. Look for small easy wins, build on what's worked
4. Plant seeds - growth seen later mindset
5. Difficult to have specific goals because the topic is so broad
6. Difficult to prioritize issues
7. Without goals and priorities, it is difficult to see impact

8. Don’t have data to know what success is
9. Lack of agreement on standard reporting, including data
10. Aging in a silo, age not burden, don’t have common language
11. Community members don’t know what we do or who we are

INTERNAL ISSUES (Successful outcomes)

12. Lack of community attending meeting
13. How to leverage what others are doing and adopt best practices
14. Don’t know how to explain why older adult issues matter (Talking points)

TOPIC 2 - SUCCESSFUL OUTCOMES

Possibilities (Successful outcomes)

EXTERNAL POSSIBILITIES (Successful outcome)

1. Set reasonable expectations and timelines
2. Balance small and big goals, long term and short
3. Focus, narrow, clearly defined whatever the topic
4. Process should focus on outcomes
5. Don’t reinvent the wheel
6. Build relationships with private individuals, organizations and agencies
7. Generate a list of ways to work with community
8. Get out into community with listening/information meetings
9. Number of community meetings

INTERNAL POSSIBILITIES (Successful outcome)

10. Clarify our role and priorities with outcomes
11. Less business meetings and more in community
12. Develop list of talking points

13. List our MCCOA & AAA goals and align the two
14. Work with AAA on key goals and viable funding solutions
15. Revisit ad hoc committees

TOPICS 3 - TOPICS AND GOALS

Issues (Topics & Goals)

EXTERNAL

1. Ageism, inclusion and equity (Diane Doodha, Alison Donnally, Suresha Hill)
    a. Ensuring older adults included & budgeted as a County priority
    b. Structural & process changes to prioritize and support needs of older adults
    c. Incorporate assessment (AAA, public health, etc.), county and community input as basis for priorities
    d. Need creative solutions
    e. Demonstrating commitment
    f. Community engagement
    g. Employment
    h. Transparency

2. Health & Wellness Reimagined
    a. Access to resources
    b. Crimes, financial abuse, scams
    c. Accessible & affordable health care
    d. Care coordination
    e. Falls
    f. Social isolation & feeling connected
    g. Finding those socially isolated (Lindsay Alexovich)
    h. Loss of memory or cognition
    i. Caregivers (Unpaid & paid), Respite opportunity
    j. Finding qualified help / caregivers

k. Building sustainable services, support, & training
l. Volunteer
m. Emergency preparedness (Lindsay Alexovich. Lauren Elkin)
n. Climate & environment
o. Transparency
p. End of life planning

3. Affordable Aging
    a. Basic needs
    b. Financial security
    c. Food insecurity
    d. Personal safety
    e. Aging in place (Diane Doodha, Alison Donnally)
    f. Not all systems ready for aging
    g. Computer literacy / phone literacy
    h. Transparency
    i.
4. Housing & Transportation
    a. Housing security & affordability
    b. Age & disability communities
    c. Transparency
    d. Transportation information accurate & accessible (outdated)

INTERNAL

5. Clarify and refine definition of issues, collaboration opportunities, solutions

TOPICS 3 - TOPICS AND GOALS

Possibilities (Topics & Goals)

Possibilities (Topics & Goals – Information to community)

1. Attend various community activities (e.g. library meetings)
2. District wide listening sessions

3. Go to council meetings at all organizations serving seniors; ask how we can help with their goals (Barry Phegan, Lauren Elkin)
4. Advocate older adults be separately identified in county community outreach plans (Lauren Elkin)

Possibilities (Topics & Goals – Outreach & Connection)

5. Advocate for more adult day care/centers
6. Attend congregate meals and get the word out
7. Recreation center & library programs (advocate for as in Tiburon/belvedere)
8. Ross valley seniors - a model to replicate elsewhere
9. Presentations in West Marin
10. Update transportation sheet on guide
11. Online resource guide (Lauren Elkin)
12. Distribute guides
13. Disaster preparedness as a door into our room
14. Technology - look at what's going on elsewhere, where can it help (Barry Phegan)

Possibilities (Topics & Goals - Partnership

15. Build bridge to school districts and others
16. Collaborate with police-fire-hospitals (Lauren Elkin)
17. Partner with other nonprofits (e.g. ESCOM, Vivalon)
    (Lee Notowich, Rhea Brown, Lindsay Alexovich, Barry Phegan, Lauren Elkin)
18. Book passage, buck-institute, etc. (Barry Phegan)

Action Item Groupings – Interest In General Areas

- On Boarding
  Lindsay Alexovic, Suresha Hill, Diane Doodha, Lauren Elkin

- COA Meeting Culture
  Lauren Elkin

- Communications with community
  Lee Notowich, Tricia Smith

- Messaging
  Suresha Hill, Diane Doodha, Alison Donnally

- Prioritization

Lauren Elkin, Alison Donnally, Bob Holtz

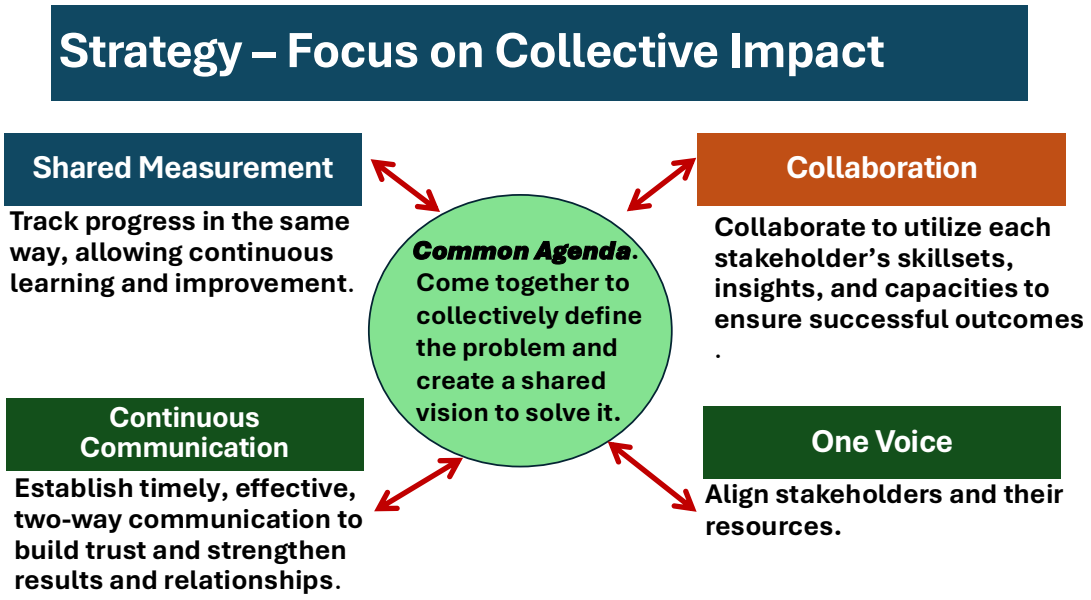
- Partnership
  Bob Holtz, Lee Notovich, Jane Chez, Rhea Brown, Barry Phegan, Lauren Elkin

- Internal communication
  Lindsay Alexovich, Kay Winer, Lee Notowich, Lauren Elkin

- Outreach & connection
  Bob Holtz, Jane Chez, Rhea Brown, Tricia Smith, Barry Phegan, Lauren Elkin

Next Steps & Agreement

- Discussions during the retreat regarding issues, possibilities, and solutions should continue to be part of future meetings.
- Create a listing of the items that each person would like to be involved with.
- Break the items out into two sections and share them with members to see what items are of interest to them.
  - Internal policies/procedures – HOW we do what we do.
  - External action items – WHAT we do.
- Recommend including the listing of items provided in advance since there were too many items to be posted by hand but should be included in the voting process.
- Agreed to focus on collective impact going forward:



Initial takeaways from meeting

- Meeting approach was intense, very collaborative, and exceptionally productive in the morning.
- Difficult to maintain that same level of enthusiasm and collaboration in the afternoon session

- Consideration should be given to having the meeting into two separate sessions with a break between each session for members to be better prepared for the second session, e.g. two separate morning sessions instead of one day long session.
- Moderator did an exceptional job covering such a wide range of items and keeping everyone on track.
- Location and table format worked out well for the retreat.
- Reconsider how you are listing item to make it easier for people to indicate their interest.
- Icebreaker was great way to learn something new about each participant in a friendly way.
- Great selection of food and beverages.
- For 9:00 AM meeting start, list 8:30 AM for introductions as people like to visit when they arrive and the meeting could start at 9:00 AM.
- In spite of opening remarks about disruptions, there were individuals having sidebar conversations while others were talking, looking at their computers or phones instead of participating, at least one person failed to turn off their phone or place in silent mode that created a distraction during the meeting.