



AARP PUBLIC POLICY INSTITUTE

ANNUAL REPORT

2011

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AARP PUBLIC POLICY INSTITUTE ANNUAL REPORT 2011

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HIGHLIGHTS

The Public Policy Institute (PPI) is the focal point of public policy research and analysis at AARP. Led by AARP Senior Vice President Susan Reinhard, PPI works to develop policy options designed to significantly improve economic security, health care, and quality of life for older Americans.

In 2011, PPI staff published 61 policy reports, held frequent public Solutions Forums and private Innovation Roundtables on policy development, and gave 143 presentations at conferences and stakeholder meetings around the country. PPI reports, available at www.aarp.org/ppi, attracted nearly 50,000 downloads in 2011.

PPI IN THE MEDIA

Media coverage of PPI reports and citation of PPI experts appeared in more than 400 articles in 2011, up from 125 in 2010.

Much of this coverage focused on a few key issues, sparked by PPI reports on the lasting impact of the recession on older Americans; a groundbreaking report on state performance delivering long-term services and supports; and an update on the value of caregiving. PPI also received media exposure on other issues, including the following:

- Reliance on Social Security
- Retirement planning
- Threats to Medicaid
- Medicare out-of-pocket spending
- Older adult travel patterns and Complete Streets
- Rising housing costs and the increase of multigenerational households
- Guardianship
- Reverse mortgages

The scope of PPI coverage has broadened considerably in the past year. In 2011, PPI received coverage in—

- Major media: *New York Times*, *Wall Street Journal*, ABC, CBS, NPR, Fox, *USA Today*, AP, *LA Times*, *Forbes*, *US News*, *Dow Jones*, *Gannett*, *Reuters*, *MarketWatch*, and others.
- Metro papers around the country: *Chicago Tribune*, *Boston Globe*, *Seattle PI*, *Minneapolis Tribune*, *Kansas City Star*, *Newsday*, *Salt Lake City Tribune*, *Indianapolis Star*, and many others.
- Influential trade press: *Congressional Quarterly*, *The Hill*, *Consumer Reports*, *American Medical News*, *Modern Healthcare*, *Senior Journal*, *Health Affairs*, *Kaiser Health News*, *Spotlight on Poverty*, *Public Policy and Aging*, and others.

PPI ON THE WEB

Enhancement of PPI's Web presence—marked this year by launch of the PPI online State Data Center, posting of staff expertise on the site, and extensive use of publication and event e-alerts—resulted in a doubling of traffic to the PPI site in 2011. Downloads of PPI reports from the site increased to an average of 3,925 a month in 2011, compared to a monthly average of 2,100 downloads in 2010.

PUBLICATIONS

In 2011, PPI staff published 61 reports: 8 major Research Reports, 31 Fact Sheets, 12 Insights on the Issues, 4 In Briefs, 3 Rx Price Watch reports, and several Web-only studies. Those with high immediate impact included the following:

- ***The Employment Situation***, PPI's monthly series of reports on the difficulties of older workers, received regular coverage in financial and major metro media and in network newscasts throughout the year.
- ***Recovering from the Great Recession: Long Struggle Ahead for Older Americans*** received prominent coverage in *USA Today*, *US News*, CNN, and *Forbes*; served as the basis for a *New York Times* op-ed piece by Charles Blow; and was cited in a wide range of financial and metro media.
- ***Valuing the Invaluable: 2011 Update - The Growing Contributions and Costs of Family Caregiving*** was the focus of an AP story that ran in more than 100 papers around the country. It was the subject of a Michelle Singletary column in the *Washington Post* and a lengthy NPR interview. Interviews with Susan Reinhard about the report ran on more than two dozen local stations and state radio networks around the country.
- ***Raising Expectations: A State Scorecard on Long-Term Services and Supports*** sparked a *New York Times* editorial and was featured in stories that ran in the *Boston Globe*, *Minneapolis Star Tribune*, and more than two dozen other metro papers around the country, along with dozens of radio stations and major trade publications.
- ***How Americans Rely on Social Security, State-Level View*** and ***How Social Security Fights Poverty, State-Level View*** were central to AARP state efforts to build support for preserving Social Security.
- ***How Americans Live: 10 Facts to Consider*** served as a key tool in national AARP efforts to defeat deficit reduction proposals that would have had a severe impact on older Americans.
- ***Aging in Place: State Livability Policies and Practices*** and ***State Housing Profiles: Housing Conditions and Affordability for the Older Population***, published later in the year, provide states with significant guidance for developing livable communities.

MEETINGS

PPI held seven high-profile Solutions Forums in 2011 addressing a range of issues of importance to older Americans, including health care reform, aging in place, delivery of long-term services and supports (LTSS), and caregiving. Speakers included some of the nation's leading experts and policy makers.

These forums, often held in collaboration with other national organizations, drew more than 1,000 policy makers and analysts, Hill staff, academic experts, government officials, and stakeholder leaders. Forums focused on the following:

- The Impact of Health Reform on 50–64-Year-olds—held in collaboration with the Alliance for Health Reform.
- Launching Insurance Exchanges: How Are States Doing?—held in collaboration with the Hilltop Institute.
- Advancing Health in Rural America: Maximizing Nursing's Impact—held in collaboration with the National Rural Health Association and the Robert Wood Johnson Foundation.
- Delivering LTSS Services: How Are States Doing?—held in collaboration with the Commonwealth Fund and the SCAN Foundation.
- The Challenges of Caregiving: What Needs to Be Done?—held in collaboration with 10 prominent authors and experts on caregiving.
- Aging in Place: Best Policies and Practices—held in collaboration with the National Conference of State Legislatures.
- Evaluating Care: The Experiences of Dual Eligibles—held in collaboration with the Alliance for Health Reform.

PPI held nine Innovation Roundtables in 2011, bringing together leading national experts for confidential discussions to help AARP develop policy options on key issues. These off-the-record meetings also promote candid dialogue among attending stakeholders, experts, and policy makers—with the goal of bridging ideological gaps in search of solutions. Roundtables this year included the following:

- Expanding Clinical Trials—identified barriers and possible ways to expand participation in clinical trials to include older patients and those with multiple comorbidities.
- Guardianship and Residential Choices—hosted in collaboration with the American Bar Association Commission on Law and Aging—explored the intersection between home and community-based care and decision making by guardians.

- Community Living: Promoting Independence and Engagement through HCBS Programs—discussed a proposed federal rule setting the terms for home and community-based care services and supports funded under state Medicaid waiver programs.
- The Reverse Mortgage Market in 2011: Dead or Alive?—discussed consumer protection issues, regulation, and housing counseling, along with innovations in reverse mortgage product design.
- New Vision for Medicare—discussed how and why Medicare might be reformed to make the program sustainable and explored the challenges of balancing spending cuts and protections for beneficiaries.
- Enhancing Medicare Part D: Policy Options for the Road Ahead—examined the value proposition of Part D’s current model in an effort to identify sustainable policy solutions that could benefit the entire Medicare program.
- Policies to Increase Retirement Security—discussed ideas developed and presented by Bill Gale (Brookings Institution) and David John (Heritage Foundation), codirectors of the Retirement Security Project at the Brookings Institution.
- State Capacity to Oversee Managed Care Contracts for Dual Eligibles—discussed promising approaches to determining state capacity to monitor managed LTSS contracts for older people and people with disabilities.
- Issues the CFPB’s Office of Financial Protection for Older Americans Should Address—developed recommendations for a research and outreach agenda for the Consumer Financial Protection Bureau’s (CFPB’s) Office of Financial Protection for Older Americans.

PPI also sponsored six internal AARP Dialogues that brought together national office staff and tie-in state offices to discuss research and options for policy development related to health care, economic security, and caregiving. Dialogues included the following:

- Understanding Premium Support and Its Implications for Medicare
- Health Reform Offers Opportunities for Enhanced Federal Dollars for States
- When Your Drugs Cost More than Your Car
- State and Local Pension Plans—Between a Rock and a Hard Place
- Family Caregiving in an Aging America: The New Normal
- Saving The American Dream: A Preview of PPI’s Middle-Class Economic Security Project

PRESENTATIONS

In 2011, PPI staff gave 143 presentations at conferences and stakeholder meetings across the country, with a strong focus on the following issues:

- Launching PPI's campaign to implement Institute of Medicine recommendations for the future of nursing
- Social Security reform and retirement saving
- Improving support for family caregivers
- Financial protection for older consumers
- Creating livable communities
- Improving state performance delivering long-term care services and supports
- Restraining health care costs, modernizing Medicare, and improving chronic care coordination

STRATEGIC INITIATIVES

In 2011, PPI's Strategic Initiatives group developed and managed over \$14M in funded programs and services that span AARP's key focus areas, including caregiving, LTSS, and health care. Program highlights for the year include the following:

The Center to Champion Nursing in America, with support from the Robert Wood Johnson Foundation, continued its work coordinating the Future of Nursing: *Campaign for Action* and leading policy efforts related to nursing workforce issues. The campaign envisions a health care system where all Americans have access to high-quality care, with nurses contributing to the full extent of their capabilities. The Center to Champion Nursing in America's (CCNA's) work included holding congressional briefings, organizing a Solutions Forum on improving rural health, and launching and providing technical assistance to 36 state action coalitions. CCNA produced and conducted 21 webinars in 2011, with each webinar's attendance averaging 50 to 60 individuals across the country.

Caregiving grants from the Jacob & Valeria Langeloth Foundation and the John A. Hartford Foundation supported staff work to help nurses and social workers increase support for family caregivers. This work included holding focus groups, developing educational material and videos, working with Aging and Disability Resource Centers (ADRCs), and creating in-hospital pilot programs.

With support from The SCAN Foundation and The Commonwealth Fund, PPI staff created the first State Scorecard on Long-Term Services and Supports, resulting in release of a major report and launch of an interactive website that measures state performance delivering LTSS.

PUBLICATIONS

Available online at www.aarp.org/PPI

Weathering the Storm: The Impact of the Great Recession on Long-Term Services and Supports—*Research Report*

January 2011—This report documents how the recession continues to affect state programs for older individuals and adults with physical disabilities. Demand for publicly funded services has grown, and resources—including staff—are stretched thin, according to this new 50-state study. Specifically, 31 states cut aging and disability services programs (non-Medicaid) in FY 2010, and 28 states were expecting to cut these programs in FY 2011. Authors: Fox-Grage, Wendy, PPI; Walls, Jenna; Gifford, Kathleen; Rudd, Catherine (Health Management Associates); O'Rourke, Rex; Roherty, Martha; Copeland, Lindsey (National Association of States United for Aging and Disability)

Weathering the Storm: The Impact of the Great Recession on Long-Term Services and Supports—*In Brief*

January 2011—Summary of Research Report of the same name.

The Employment Situation, December 2010: Some Encouraging Signs for Older Workers, but Not All Indicators Are Positive—*Fact Sheet*

January 2011—Fewer older people were unemployed in December than had been in November, while the unemployment rate for the population aged 55 and over fell from 7.2 percent to 6.9 percent. But more than half of unemployed older workers had been without work for 27 or more weeks. Author: Rix, Sara

Winter Heating Costs and Older and Low-Income Households—*Fact Sheet*

January 2011—Winter heating costs are likely to be a greater burden on older low-income households than on similarly aged higher-income households, even though low-income households tend to use less heating fuel than other groups. This online publication was updated monthly through March 2011. Authors: Walters, Neal; Jackson, Ann

Medicare Beneficiaries' Out-of-Pocket Spending for Health Care—*Insight on the Issues*

February 2011—Medicare beneficiaries spent a median of \$3,103 a year of their own money on health care in 2006. Ten percent of beneficiaries—more than 4 million people—spent more than \$8,300 a year. The oldest and poorest beneficiaries spent about one-quarter of their income on health care. Authors: Sinclair, Shelly-Ann, AARP; Nonnemaker, Lynn, PPI

The Employment Situation, January 2011: Unemployment Down but Overall Job Growth Remains Anemic—*Fact Sheet*

February 2011—The unemployment rate for men age 55+ fell slightly, while that for women rose slightly in January. The average duration of unemployment for older workers also rose. Author: Rix, Sara

How Recent Changes in Reverse Mortgages Impact Older Homeowners—*Fact Sheet*

February 2011—This report explains how the costs and types of reverse mortgages have changed in the aftermath of the housing crisis. New laws seek to protect homeowners who use these loans. Author: Redfoot, Donald

How the Affordable Care Act Can Help Move States Toward a High-Performing System of Long-Term Services and Supports—*Health Affairs*

March 2011—This article defines long-term services and supports and outlines the key characteristics of a high-performing system. It discusses options and incentives in the Affordable Care Act that can support cost-effective programs to help people with disabilities remain in their homes and communities. Authors: Reinhard, Susan; Kassner, Enid; Houser, Ari

The Employment Situation, February 2011: Unemployment Down for Older Women but Not for Men—*Fact Sheet*

March 2011—Average duration of unemployment for jobseekers aged 55 and older rose from 44.4 weeks in January to 45.5 weeks in February. As of February, half of these jobseekers had been out of work for 27 or more weeks, little changed from the month before. Author: Rix, Sara

New Health Care Law Helps Protect 18 Million Medicare Beneficiaries from High Drug Costs—*Fact Sheet*

March 2011—This report examines how many Medicare Part D enrollees will benefit from the new health care law that closes the “doughnut hole.” National- and state-level estimates are provided. Author: Purvis, Leigh

Adult Protective Services: Increased Demand and Decreased Funds—*Fact Sheet*

March 2011—Adult Protective Services help older people who are victims of abuse or neglect. Calls to Adult Protective Services have increased since the recession began, but most states have either decreased, or at best, maintained their budgets for these services. Author: Fox-Grage, Wendy

Rx Price Watch Report: Tracking Retail Price Changes for Widely Used Prescription Drugs—*Rx Price Watch*

March 2011—Retail prices for widely used brand-name prescription drugs increased considerably in the years prior to generic entry and continued to increase after patent expiration. Authors: Purvis, Leigh, PPI; Schondelmeyer, Stephen (University of Minnesota)

The Employment Situation, March 2011: Little Change in Unemployment Rate for Older Persons, but Rise in Unemployment Duration—*Fact Sheet*

April 2011—The average duration of unemployment for older workers and the number of discouraged jobseekers both increased in March. Author: Rix, Sara

Improving Advanced Illness Care: The Evolution of State POLST Programs—*Fact Sheet*

April 2011—States are adopting a promising program to honor the treatment goals of people with advanced illness. Authors: Karp, Naomi, PPI; Sabatino, Charles (American Bar Association)

The High Cost of Capping Federal Medicaid Funding—*Fact Sheet*

April 2011—Deficit reduction commissions and some policy makers have recommended capping federal funding to Medicaid. This Fact Sheet examines the pros and cons of these proposed changes. Author: Flowers, Lynda

How the Travel Patterns of Older Adults Are Changing: Highlights from the 2009 National Household Travel Survey—*Fact Sheet*

April 2011—Older adults make up an increasing share of the nation’s travel. They are using public transportation more and driving less than in the past. Older men outnumber women as drivers. Authors: Lynott, Jana; Figueiredo, Carlos

Multigenerational Households Are Increasing—*Fact Sheet*

April 2011—Since the beginning of the recession in 2008, the number of Americans living in multigenerational households has increased. Authors: Harrell, Rodney; Kassner, Enid; Figueiredo, Carlos

Medicaid: A Program of Last Resort for People Who Need Long-Term Services and Supports—*Fact Sheet*

May 2011—Explains how Medicaid provides a critical safety net for people who have spent their life savings paying for LTSS. Most older people will need some LTSS, and nearly a third of people turning age 65 will need to rely on Medicaid assistance. Authors: Fox-Grage, Wendy; Redfoot, Donald

The Employment Situation, April 2011: Average Duration of Unemployment for Older Jobseekers Exceeds One Year—*Fact Sheet*

May 2011—The April 2011 unemployment rate for persons age 55+ remained unchanged from the 6.5 percent for March. Average duration of unemployment, however, continued to increase, exceeding one year (53.6 weeks) for older jobseekers. Author: Rix, Sara

Home and Community-Based Long-Term Services and Supports for Older People—*Fact Sheet*

May 2011—A description of home and community-based long-term services and supports: what they are, who receives them, where they are delivered, and how people pay for them. Author: Kassner, Enid

Recovering from the Great Recession: Long Struggle Ahead for Older Americans—*Insight on the Issues*

May 2011—Shows that the recent recession has caused high unemployment, loss of income and savings, and lower home values. Four in ten older Americans expect a lower standard of living in retirement than that of their parents. Author: Rix, Sara

Family Income Sources for Older Persons, 2009—*Fact Sheet*

May 2011—This report finds that older people with low family income depend heavily on Social Security and that Social Security earnings have become increasingly more important for the older population. Author: Wu, Ke Bin

Advancing Health in Rural America: Maximizing Nursing’s Impact—*Fact Sheet*

June 2011—The 70 million Americans who live in rural areas face a significant shortage of health care providers. Registered nurses and advanced practice registered nurses are delivering essential health care services as primary providers and care managers in rural areas. Author: Gorski, Mary Sue

The Employment Situation, May 2011: Average Duration of Unemployment for Older Jobseekers Continues to Rise—*Fact Sheet*

June 2011—The May 2011 unemployment rate for persons age 55+ rose from 6.5 percent in April to 6.8 percent—lower than at the depth of the recent recession but still more than double the rate in 2007, when the recession began. Author: Rix, Sara

Health Reform Law Creates New Opportunities for States to Save Medicaid Dollars—*Insight on the Issues*

July 2011—Examines how health care reform allows cash-strapped Medicaid programs to get extra federal dollars. Authors: Fox-Grage, Wendy; Flowers, Lynda

How Many Older Americans Live: Ten Facts to Consider—*Fact Sheet*

July 2011—Pulls together key data about economic security and health care for the 65-plus population. Authors: Koenig, Gary; Walker, Lina

Valuing the Invaluable: 2011 Update—The Growing Contributions and Costs of Family Caregiving—*Insight on the Issues*

July 2011—Estimates the economic value of family caregiving at \$450 billion in 2009, up from \$375 billion in 2007. The report also details the costs of providing family care, and provides policy recommendations to better support caregiving. Authors: Feinberg, Lynn; Reinhard, Susan; Houser, Ari; Choula, Rita

Valuing the Invaluable: 2011 Update—The Economic Value of Family Caregiving in 2009—*Fact Sheet*

July 2011—Shows state-by-state estimates of the economic value of family caregiving. Authors: Feinberg, Lynn; Reinhard, Susan; Houser, Ari; Choula, Rita

Rx Price Watch Report: Tracking Retail Price Changes for Widely Used Prescription Drugs—*Rx Price Watch*

July 2011—Retail prices for generic prescription drugs widely used by Medicare Part D enrollees fell between 2005 and 2009. Authors: Purvis, Leigh, PPI; Schondelmeyer, Stephen (University of Minnesota)

The Employment Situation, June 2011: Dismal Job News for Older Workers—*Fact Sheet*
July 2011—June was a dismal month for older jobseekers—the unemployment rate rose; average duration of unemployment remained above one year; and the economy produced little in the way of new jobs. Author: Rix, Sara

The Employment Situation, July 2011: Little Improvement for Older Workers—*Fact Sheet*
July 2011—July showed very little improvement over June for older jobseekers—the unemployment rate dipped only slightly; average duration of unemployment remained above one year; and the economy seemed unlikely to produce enough new jobs to meet the demand for them. Author: Rix, Sara

The Employment Situation, August 2011: Older Worker Unemployment Remains Stubbornly High—*Fact Sheet*
August 2011—August showed very little improvement over July for older jobseekers—the unemployment rate dipped only slightly; average duration of unemployment remained above one year; and the economy produced no new jobs. Author: Rix, Sara

Protecting Investors—Establishing the SEC Fiduciary Duty Standard—*Research Report*
September 2011—Explains how the Securities and Exchange Commission (SEC) can strengthen federal guidelines for protecting older investors. Authors: Wilson, Ryan, PPI; Bullard, Mercer (University of Mississippi School of Law)

How Older Americans Rely on Social Security: State-Level View—*Fact Sheet*
September 2011—Provides details on the numbers of older Americans in each state relying on Social Security for much of their total family income. Author: Caldera, Selena

How Social Security Fights Poverty: State-Level View—*Fact Sheet*
September 2011—Shows the numbers of older Americans by state who would be in poverty without Social Security. Author: Caldera, Selena

Raising Expectations: A State Scorecard on Long-Term Services and Supports—*Research Report*
September 2011—This first-ever evaluation of state performance shows wide variation in care and support for older adults and persons with disabilities. Written in collaboration with the Commonwealth Fund and the SCAN Foundation, the scorecard lays the groundwork for state measurement and improvement of performance delivering services. Authors: Reinhard, Susan; Kassner, Enid; Houser, Ari, PPI; Mollica, Robert

Summer Cooling Costs and Older Households—August 2011—*Web publication*
September 2011—Older consumers are facing rising electric bills as a result of this summer's unusually hot weather and the increasing cost of energy. Authors: Jackson, Ann McLarty; Walters, Neal

Policy and Design Considerations for Accommodating Low-Speed Vehicles and Golf Carts in Community Transportation Networks—*Insight on the Issues*

September 2011—Low-speed vehicles and golf carts offer economical transportation options in many communities. Growing use of these vehicles will require greater attention to planning, infrastructure design, public education, and regulation. Authors: Lynott, Jana, PPI; Poncy, Amanda Taylor; Twaddell, Hannah (Renaissance Planning Group)

State Housing Profiles: Housing Conditions and Affordability for the Older Population—*Research Report*

September 2011—Provides a full range of data on key housing indicators for older adults in every state and the District of Columbia. Authors: Harrell, Rodney; Houser, Ari

Housing for Older Adults: The Impacts of the Recession—*Insight on the Issues*

September 2011—Highlights a drop in the percentage of homeowners over 50 who own their homes free and clear and shows rising costs for those who rent or still pay mortgages. Author: Harrell, Rodney

Removing Barriers to Advanced Practice Registered Nurse Care: Hospital Privileges—*Insight on the Issues*

October 2011—PPI's Center to Champion Nursing in America shows how consumers benefit when advanced practice registered nurses have hospital privileges. Authors: Brassard, Andrea; Smolenski, Mary

The Employment Situation, September 2011: Good News for Older Jobseekers Remains Elusive—*Fact Sheet*

October 2011—September showed very little improvement over August for older jobseekers—the unemployment rate was essentially unchanged; average length of unemployment remained above one year; and the percentage of long-term unemployed increased. Author: Rix, Sara

Health Reform Law Creates New Opportunities to Better Recognize and Support Family Caregivers—*Fact Sheet*

October 2011—Health care reform offers new, meaningful supports to assist family and friends in their caregiving role. This Fact Sheet highlights selected provisions in the Affordable Care Act that address caregivers in health care and in long-term services and supports. Authors: Feinberg, Lynn, PPI; Reamy, Allison (Pennsylvania State University)

A Snapshot of Utility Expenditures by Older Consumers—*Web publication*

October 2011—Identifies trends in consumer spending on utilities and shows how these expenditures vary by age, income, household size, and geographic location. Author: Walters, Neal

Winter Heating Costs to Burden Many Older Consumers—*Web publication*

October 2011—Higher heating bills will hit many older consumers this winter, especially those using fuel oil for heat. Authors: Jackson, Ann McLarty; Walters, Neal

Biologics in Perspective: The New Biosimilar Approval Pathway—*Fact Sheet*

November 2011—Highlights the recent creation of an approval pathway for generic versions of biologic drugs, or biosimilars, and explains what this means for consumers. Author: Purvis, Leigh

Upgrading the Nation’s Water Infrastructure While Maintaining Affordable Water Rates—*Insight on the Issues*

November 2011—Explores concerns about replacing the nation’s rapidly aging water infrastructure while keeping water rates affordable for consumers. Author: Walters, Neal

Many Medicare Part D Plans to Raise Premiums, Increase Cost-Sharing—*Insight on the Issues*

November 2011—Recommends that beneficiaries carefully evaluate 2012 Part D plans during open enrollment because many plans have raised premiums and co-pays. Authors: Purvis, Leigh; Rucker, N. Lee

Protecting Older Investors with Diminished Capacity—*Research Report*

November 2011—Reviews current financial services industry practices and recommends ways to improve protection of older investors. Authors: Karp, Naomi; Wilson, Ryan

Protecting Older Investors with Diminished Capacity—*In Brief*

November 2011—Summary of Research Report of the same name.

The Employment Situation for Older Workers: No Silver Lining—*Fact Sheet*

November 2011—The unemployment rate for people aged 55 and older increased to 7 percent from 6.7 percent in October. Nearly 2.2 million older people were out of work and looking for a job. Author: Rix, Sara

50+ and Worried—*Insight on the Issues*

November 2011—Highlights results of a PPI national survey and reveals growing concerns about current and future financial well-being. Author: Rix, Sara

Addressing the Challenges of Family Caregiving—*In Brief*

December 2011—Highlights common themes from the writings of prominent authors with a focus on policies to improve support for family caregivers. Authors: Reinhard, Susan; Feinberg, Lynn; Choula, Rita

Aging in Place: State Livability Policies and Practices—*Research Report*

December 2011—Identifies state land use, housing, and transportation policies and practices that promote aging in place. Written jointly with the National Conference of State Legislatures. Authors: Lynott, Jana; Fox-Grage, Wendy, PPI; Farber, Nicholas; Shinkle, Douglas (National Conference of State Legislatures)

Aging in Place: State Livability Policies and Practices—*In Brief*

December 2011—Summary of Research Report of the same name.

Unemployment Falls for Older Workers; Duration of Unemployment Rises—*Fact Sheet*
December 2011—The unemployment rate dropped for workers 55-plus in November. Duration of unemployment continued to increase. Author: Rix, Sara

An Analysis of 2010 Utility Expenditures by Older Consumers—*Web publication*
December 2011—Identifies trends in consumer spending on utilities and shows how these expenditures vary among consumers by age, income, household size, geographic location, and ethnicity. Author: Walters, Neal

Experienced Voices: What Kind of Care Works Best for Dual Eligibles?—*Research Report*
December 2011—Insights from focus groups with older adults enrolled in both Medicaid and Medicare. Author: Flowers, Lynda

Income, Poverty, and Health Insurance Coverage of Older Americans, 2010—*Fact Sheet*
December 2011—Shows that Social Security helped shield older households from increases in poverty and drops in median income experienced by other age groups since 2007. Author: Wu, Ke Bin

Excluding Older, Sicker Patients from Clinical Trials: Issues, Concerns, and Solutions—*Insight on the Issues*
December 2011—Discusses possible approaches to expanding clinical trials to include older people and those with chronic conditions to make research more relevant for clinicians treating these people. Author: Lind, Keith

Winter Heating Costs Report—*Web Publication*
December 2011—This report shows that heating costs will burden many older consumers in 2012. Authors: Jackson, Ann; Walters, Neal

SOLUTIONS FORUMS

Health Reform Impact on 50–64-Year-olds—January 24, 2011

Held in collaboration with the Alliance for Health Reform, this forum explored how health reform impacts adults 50–64, specifically by providing insurance options now for older workers and early retirees until the Patient Protection and Affordable Care Act is fully implemented in 2014. Speakers included AARP’s John Rother; Richard Popper, Department of Health and Human Services (HHS) Office of Consumer Information and Insurance Oversight; Sara Collins, Commonwealth Fund; and Joseph Antos, American Enterprise Institute. 150 attendees.

Launching Insurance Exchanges: How Are States Doing—April 4, 2011

Despite court challenges to health reform, many states are moving ahead with plans for the launch of state insurance exchanges central to implementation of the Affordable Care Act. The forum looked at key issues such as governance and oversight; adverse risk selection; plan selection and participation; integration with public programs and the private market; and public transparency. Speakers included John Rother; Joel Ario, head of the Exchange office at HHS; and officials in charge of creating health exchanges in Colorado, Utah, Virginia, and Maryland. The forum was held in collaboration with the Hilltop Institute. More than 150 policy experts and Hill staff attended.

Advancing Health in Rural America: Maximizing Nursing’s Impact—June 13, 2011

Hosted by the Center to Champion Nursing in America, this forum discussed the shortage of primary and preventive care in rural communities and highlighted nursing solutions. Mary Wakefield, Administrator, Health Resources and Services Administration, provided the keynote presentation; panelists included nursing leaders from the Veterans Administration and the Indian Health Service. Held in collaboration with the National Rural Health Association and the Robert Wood Johnson Foundation, the forum focused on implementing recommendations of the recent Institute of Medicine (IOM) report, *The Future of Nursing: Leading Change, Advancing Health*. 125 attendees.

Delivering LTSS Services: How Are States Doing—September 8, 2011

This forum, held in collaboration with the Commonwealth Fund and the SCAN Foundation, presented findings from the first LTSS State Scorecard (developed by PPI), which showed wide variation in state performance delivering long-term services and supports. A panel discussing national implications of the report included senior officials from the U.S. Centers for Medicare & Medicaid Services (CMS), HHS, the Administration on Aging, the Family Caregiver Alliance, and the National Association of States United for Aging and Disabilities (NASUAD). A second panel of officials from Maryland, Arkansas, Ohio, and Connecticut discussed the findings from the state perspective. 200 attendees.

The Challenges of Caregiving: What Needs to Be Done?—December 1, 2011

Ten prominent authors and experts discussed the difficulties faced by millions of family caregivers coping with our health and LTSS systems. They explored how public policies can more effectively address the needs of caregivers and provided insight on how health care professionals can improve support for family caregivers. Moderated by Susan Dentzer, Editor-in-Chief of *Health Affairs*, panelists included Walter Mosely, Jane Gross, Howard Gleckman, Jonathan Rauch, Carol Levine, Suzanne Mintz, Peter Rabins, Bob Kane, Cheryl Woodson, and Gail Sheehy. More than 200 participants attended and over 200 people participated by webcast.

Aging in Place: Best Policies and Practices—December 8, 2011

PPI and the National Conference of State Legislatures discussed their recently released joint publication *Aging in Place: A State Survey of Livability Policies and Practices*. In addition, at this forum state legislators and program managers showcased laws, policies, and programs that improve community livability for older people—with particular attention to efforts that are succeeding in times of fiscal budget tightening. 125 attendees. 23 AARP state offices joined via video conference, and over 130 other groups and individuals logged into the live webcast.

Evaluating Care: The Experiences of Dual Eligibles—December 12, 2011

This forum, held in collaboration with the Alliance for Health Reform, looked at how dual eligibles experience health care. At the forum, PPI released a report summarizing the findings of focus groups with older duals in a range of care delivery systems. A senior HHS official discussed findings from a CMS study of the experiences of younger duals, and Medicaid experts offered insights from state programs serving dual eligibles. Panelists also discussed the policy implications of these findings. Attended by more than 250 Hill staff and stakeholders.

ROUNDTABLES

Expanding Clinical Trials—April 5, 2011

This meeting focused on identifying barriers and possible ways to expand participation in clinical trials to include older patients and those with multiple comorbidities. These patients continue to be underrepresented in clinical trials, making it difficult to generalize the benefits and risks found in trials and leading some physicians to question the relevance of the results. Expanding clinical trials should provide better evidence-based medicine and more relevant guidance to clinicians.

Guardianship and Residential Choices—May 9, 2011

This roundtable, hosted in collaboration with the American Bar Association Commission on Law and Aging, explored the intersection between home and community-based care and decision making by guardians. The discussion included a look at factors that guardians consider and standards of practice regarding where incapacitated people live, including the interplay of

disability and risk; real-world challenges posed by individual and societal resource limitations; and public policies to incentivize maintaining adults with disabilities in the community.

Community Living: Promoting Independence and Engagement through HCBS Programs—June 1, 2011

The meeting brought together key national experts, including high-level officials from CMS, to discuss a proposed federal rule setting the terms for HCBS and supports funded under state Medicaid waiver programs. This proposed rule is part of a larger effort by CMS to set meaningful standards to encourage “community living” through a variety of HCBS programs.

New Vision for Medicare—September 7, 2011

This roundtable brought together a small group of Medicare experts with diverse perspectives to discuss a vision for Medicare going forward. Speakers presented a range of views on how and why Medicare should be reformed to make the program sustainable and discussed some of the challenges in balancing spending cuts and protections for beneficiaries.

The Reverse Mortgage Market in 2011: Dead or Alive? —October 17, 2011

This roundtable brought together representatives from the Department of Housing and Urban Development (HUD), Federal Housing Administration, CFPB, reverse mortgage lenders, housing counselors, and consumer groups to discuss consumer protection issues, regulation, and housing counseling, along with innovations in reverse mortgage product design. The meeting was held to inform launch of a CFPB study examining potentially unfair, deceptive, or abusive practices related to reverse mortgage transactions in an effort to develop an integrated model disclosure standard.

Enhancing Medicare Part D: Policy Options for the Road Ahead—November 14, 2011

This roundtable examined the value proposition of Part D’s current model in an effort to identify sustainable policy solutions that could benefit the entire Medicare program. Speakers representing public and private Part D stakeholders and leading policy researchers focused on current program challenges, benefit design, utilization trends, medication therapy management, and structural reform options.

Policies to Increase Retirement Security—December 5, 2011

The roundtable discussed ideas developed and presented by Bill Gale (Brookings Institution) and David John (Heritage Foundation), who are codirectors of the Retirement Security Project at the Brookings Institution. Participants included experts from the Urban Institute, Society of Actuaries, Employee Benefit Research Institute, Investment Company Institute, and the Aspen Institute. Feedback from the roundtable will be used to narrow the number of possible policy options for additional development.

State Capacity to Oversee Managed Care Contracts for Dual Eligibles—December 7, 2011

This meeting brought together federal and state officials and other experts to discuss a range of questions, including promising approaches to determining state capacity to monitor managed LTSS contracts for older people and people with disabilities. The meeting was held as the federal government seeks to determine whether states are ready and able to oversee these contracts for the most vulnerable Medicaid and Medicare beneficiaries.

Issues the CFPB's Office of Financial Protection for Older Americans Should Address—December 9, 2011

This roundtable brought together academics, representatives of aging organizations, elder justice experts, government officials, and other stakeholders to develop recommendations for a research and outreach agenda for the CFPB's Office of Financial Protection for Older Americans. The office is charged with developing goals for programs that help seniors protect themselves from unfair, deceptive, or abusive practices.

DIALOGUES

Understanding Premium Support and Its Implications for Medicare—March 4, 2011

Explained what premium support is, reviewed several recent proposals for converting the Medicare program to a premium support system, and laid out issues for AARP to consider.

Health Reform Offers Opportunities for States—March 15, 2011

Discussed Medicaid options created by the Affordable Care Act (ACA) that can bring extra federal dollars to cash-strapped states and improve quality of care for beneficiaries.

When Your Drugs Cost More than Your Car—June 2, 2011

Explored the many issues surrounding biologic drugs and their implications for older Americans, as well as provisions in the ACA that will finally allow the Food and Drug Administration to approve generic versions of biologics, or biosimilars.

State and Local Pension Plans—Between a Rock and a Hard Place?—June 6, 2011

Discussed the future viability of state and local pension plans. Some experts have estimated that the current value of their future liabilities exceeds their assets by as much as three trillion dollars.

Family Caregiving in an Aging America: The New Normal—July 18, 2011

Discussed new national and state estimates of the economic value of family caregiving. Highlighted why family caregiving is now viewed as a public health concern, and discussed how caregiving is gaining recognition among policy makers and health professionals.

Saving the American Dream: A Preview of PPI's Economic Security Project—Oct 10, 2011

Provided an overview of research, analysis, and communications efforts designed to shed light on the middle-class struggle and offer policy options to help restore middle-class prosperity. PPI is the AARP lead in this multiyear, high-profile project.

STRATEGIC INITIATIVES

PPI's Strategic Initiatives group develops, oversees, and manages programs and services that span AARP's key focus areas, including caregiving, LTSS, and health care. In 2011, Strategic Initiatives managed over \$14M in funded programs. Highlights of program accomplishments are detailed below.

CENTER TO CHAMPION NURSING IN AMERICA

The Center to Champion Nursing in America continued its work coordinating *The Future of Nursing: Campaign for Action* and leading policy efforts related to nursing workforce issues. This work is grounded in the Institute of Medicine's 2010 report that focused on key recommendations that serve to move the health care system forward with nurses as a force for change.

Policy

Efforts by PPI's Center to Champion Nursing in America resulted in language in the Senate Appropriations Committee fiscal 2012 funding for HHS, calling on Secretary Kathleen Sebelius, working with the Health Resources and Services Administration and CMS, to develop a plan to implement the Institute of Medicine recommendations on the future of nursing and to report back to the committee early next year.

State practice laws and regulations are under review by the Federal Trade Commission (FTC). Based on the IOM recommendations, key congressional leaders, including the chairman and senior Democrat of the U.S. Senate Commerce Committee, urged the FTC to review existing and proposed state regulations concerning advanced practice registered nurses to identify regulations with anticompetitive effects. As a result, the FTC made the issue of unfair barriers to advanced practice nurses a priority and is reaching out to states to evaluate state laws and regulations. Florida and Texas have reached out independently to the FTC, and both have received favorable rulings.

In addition, many of the Health Resources Services Administration's (HRSA's) 2012 round of Title VIII grants will reflect the IOM recommendations. This development is important because it signifies the increasing recognition of nursing issues by federal authorities.

Events

CCNA convened its Champion Nursing Coalition (48 health care, business, and consumer organizations) and Champion Nursing Council (27 national nursing associations) three times during 2011 (January, May, and July), focusing on strategy development in support of *The Future of Nursing: Campaign for Action*. Over the course of the three meetings, participants heard from leaders of Aetna, the Health Information and Management Systems Society, LeadingAge, the Leapfrog Group, and Target, as well as AARP President Lee Hammond and Future of Nursing Strategic Advisory Committee Chair Sheila Burke, among others.

In March, CCNA presented a congressional briefing cosponsored by AARP, the Champion Nursing Coalition, and the Robert Wood Johnson Foundation, *The Future of Nursing: Leading Change, Advancing Health—The Impact on Your State and Communities*. The briefing, cohosted by the House and Senate Nursing Caucuses, featured Executive Vice President for Policy, Strategy and International Affairs John Rother, along with Urban Institute President Bob Reischauer; Institute of Medicine Executive Officer Judith Salerno; Association of American Medical Colleges President & CEO Darrell Kirch; National Hispanic Medical Association President & CEO Elena Rios; and Aetna Chief Nursing Officer Susan Kosman.

In May, CCNA hosted a national webinar with Ellen Marie Whelan, currently with the Center for Medicare and Medicaid Innovation, on *Enhanced Opportunities for Nursing in an Evolving Health Care Arena*.

In June, CCNA cohosted with the National Rural Health Association and the Robert Wood Johnson Foundation a PPI Solutions Forum on *Advancing Health in Rural America: Maximizing Nursing's Impact*. The event was keynoted by HRSA Administrator Mary Wakefield and included panelists from the Veterans Administration, the Indian Health Service, and rural health leaders in several states. More than 100 participants attended in person, with an additional 200+ joining via live webcast.

In October, CCNA cohosted, with AARP New Jersey and the New Jersey State Nurses Association, a forum on board governance and nurse leadership. The event featured remarks from Senior Vice President and CCNA Chief Strategist Susan Reinhard.

In October, CCNA hosted a Capitol Hill reception, with the Champion Nursing Coalition and the Nursing Community, marking one year of progress since the release of the IOM report on the future of nursing. Speakers included AARP Executive Vice President Nancy LeMond, a representative from Target, and Reps. Lois Capps and Steve LaTourette.

In December, with the Convenient Care Association, CCNA hosted a PPI Innovation Roundtable on *Transforming Health Care Delivery—Convenient Care: Opportunities for the Future*. The roundtable included representatives from leading retail clinic operators, such as Target, Walgreens (Take Care Health Systems), and Belin FastCare.

During 2011, CCNA hosted 22 webinars designed to assist states active in *The Future of Nursing: Campaign for Action* in implementing the recommendations of the Institute of Medicine report.

Presentations

CCNA staff gave 44 presentations in 2011.

Publications

- **Advancing Health in Rural America: Maximizing Nursing's Impact—*Fact Sheet***

The 70 million Americans who live in rural areas face a significant shortage of health care providers. This report by Mary Sue Gorski shows that registered nurses and advanced practice registered nurses are delivering essential health care services as primary providers and care managers in rural areas.

- **Removing Barriers to Advanced Practice Registered Nurse Care: Hospital Privileges—*Insight on the Issues***

This paper by Andrea Brassard and Mary Smolenski examines how continuity of care improves when nurse practitioners and other advanced practice registered nurses who take care of patients in primary care settings can follow patients admitted to the hospital.

Media

- Nursing Jobs Outlook, Workforce Trends and Actions: *NurseZone*
- Leapfrog Adds Magnet Status to Its Annual Survey: *NurseZone, Nurse.com*
- *Campaign for Action* Names 21 Additional State Coalitions: *Nursing Spectrum, Advance for Nurses*
- *Campaign for Action* One Year of Progress: *American Journal of Nursing*

Other

For The Future of Nursing: *Campaign for Action*, CCNA developed, coordinated, and provided technical assistance to 36 state Action Coalitions, composed of nurses and other health care professionals, business leaders, consumers, and others, to implement the recommendations.

CCNA launched a *Learning Collaborative on Advancing Nursing Education Transformation*, designed to support nursing leaders, Action Coalitions, and other key stakeholders to implement IOM recommendations related to education.

2011 CAREGIVING GRANT ACTIVITIES

With funding from the Jacob & Valeria Langeloth Foundation, caregiving staff—

- Conducted a series of eight focus groups with African American and Latino family caregivers, as well as the nurses and social workers who work within those communities. The purpose of the focus groups was to learn about the challenges that diverse family caregivers face when working with nurses and social workers, particularly in hospital settings. The focus groups highlighted the needs of professionals when working with these populations.
- Developed a summary of the findings from these focus groups that will be expanded in a publication to be released in early 2012.

- Used the focus group findings as a foundation for the development of a series of educational videos and articles published by the *American Journal of Nursing* to inform nurses and social workers in hospital settings.
- Developed and produced a video titled *In Their Own Words: Caregivers' Experiences in the Hospital*. This video highlights the experiences of four family caregivers (all AARP employees) who faced challenges while with their loved one in the hospital. The video is used in presentations; is on the AARP.org website; will be used by nursing faculty with their university nursing students to discuss the needs of family caregivers; and will be included in the toolkit that is a deliverable of the grant.
- In collaboration with the *American Journal of Nursing*, produced a three-part series titled *Supporting Family Caregivers*. The series is a compilation of three videos with corresponding articles written by experts in the caregiving field on the following topics:
 - Assessing the Needs of the Family Caregiver
 - Partnering with Family Caregivers by Recognizing Them as Partners in Care
 - Principles/Practices for Teaching Essential Skills to Family Caregivers
- Arranged for these articles to be featured in both the online and print editions of the *American Journal of Nursing* (AJN) in October, November, and December 2011. The educational videos, along with interviews of the experts, are featured on the AJN website. In addition to the AJN site, these tools will be featured in an online tool for nurses supporting family caregivers in over 300 hospitals across the country.
- In partnership with the NICHE program (Nurses Improving Care for Healthsystem Elders – New York University), selected five pilot hospital sites to develop evidence-based programs that will help nurses better support family caregivers of older adults in hospital settings. These sites represent diverse socioeconomic and ethnic populations across the United States. Workgroup webinars were held in November and December. The program development and implementation will be done throughout 2012.

With funding from The John A. Hartford Foundation, staff—

- Developed and implemented a pilot program (in partnership with the U.S. Administration on Aging (AoA), the New Jersey Department of Health and Senior Services (NJDHSS), and Family Caregiver Alliance) to provide training for social workers in four New Jersey counties to increase professional knowledge and skills in the provision of caregiver support.
- Completed a final evaluation in December 2011. Next steps include meetings with NJDHSS, AoA, and grant partners to discuss a plan for replication in additional ADRCs throughout the United States.
- Fielded a survey in December 2011, in partnership with the United Hospital Fund, to fill gaps in research for developing public policy solutions that support and strengthen

families in their caregiving role. The proposed research will shed light on the contributions that family caregivers make to the health care system. Specifically, this survey will (1) identify the health-related tasks that family caregivers perform, (2) determine how prepared family caregivers feel in doing these tasks and their level of competence and confidence in performing health-related tasks, and (3) assess caregiver expectations from professionals (nurses and social workers) to support them in understanding and carrying out the tasks.

Presentations and other related activities:

- 2011 NASUAD Home and Community-Based Services Conference
- 2011 ADRC Grantee Meeting hosted by AoA and CMS
- 2011 American Society on Aging Annual Meeting
- 2011 Annual NICHE Conference
- 2011 Meeting of the Veterans Administration Family Caregiver Support Program
- Assisted with the “Celebrate Caregiving” Booth at the 2011 Life@50+ Event (specifically recruited volunteers from local (Louisiana) caregiving organizations to assist with caregiver questions at the booth)
- Published an Article in *AARP – The Journal*, “Lifting the Cloak of Invisibility: Nurses and Social Workers Supporting Family Caregiver” (S. Reinhard, R. Choula, Summer 2011)
- Provide technical assistance on an ongoing basis to colleagues on the My Home and Family Portfolio, Integrated Communications (Ad Council partnership, Revamping of Caregiver Resource)

LONG-TERM SERVICES AND SUPPORTS SCORECARD

With the support of the Commonwealth Fund and the SCAN Foundation, Strategic Initiatives staff and the Independent Living/LTSS team produced the groundbreaking report *Raising Expectations*, which assessed the performance of states across four key dimensions using approximately 25 key industry indicators.

Released at a Solutions Forum on Capitol Hill on September 8, 2011, the Scorecard is available in print and online at www.longtermscorecard.org. The report generated coverage in national and local media and in many blogs. Staff have presented results extensively to policy makers and industry leaders.

The Scorecard has been so successful that the AARP team and the funders are engaged in developing the next iteration of the Scorecard. The National Advisory and Technical Advisory Panels, boards of advisors with expertise in industry thought leadership, data, research and analysis, are set to convene in early 2012 to begin the development process for the next edition, slated for June 2013.

STAFF EXTERNAL PRESENTATIONS

Economic Security

“Social Protection Strategies and Demographic Change,” presented by Gary Koenig at the United Nations forum Achieving Social Protection for All in observance of the United Nations World Day of Social Justice, New York, NY, February 17, 2011.

“What Might Social Security Reform Mean for Retirement Security: The Role of Work and Savings,” presented by Gary Koenig at the AARP International/Organization for Economic Cooperation and Development forum Retirement System Reforms: Exploring International and American Experiences, Challenges, and Policies in Increasing Retirement Security, Washington, DC, April 8, 2011.

“Tax Expenditures: Retirement Savings Incentives,” presented by Gary Koenig at the National Policy Council, Santa Fe, NM, June 2011. The presentation followed one by Max Shvedov that provided an overview of tax expenditures and possible reform options.

“The Deficit, National Debt, and Entitlement Programs,” presented by Gary Koenig to the Board of LeadingAge, July 19, 2011.

Selena Caldera presented on Social Security reliance at the annual meetings of the Association of Public Policy Analysis and Management as part of the National Academy of Social Insurance roundtable on Social Security reform.

Gary Koenig served as a discussant at the 13th annual conference of the Retirement Research Consortium. He discussed the paper “Aging and Pension Reform in a Two-Region World: The Role of Human Capital.” Washington, DC, August 4, 2011.

“Social Security: An Overview,” presented as a webinar by Gary Koenig to AARP state offices and volunteers, April 2011.

“It’s Your Age, Baby, or Is It? A Look at Age Discrimination in the Great Recession,” presented by Sara Rix at the Gerontological Society of America’s annual meeting, Boston, MA, November 18–22, 2011.

“Older Worker Training in a World of Uncertainty,” presented by Sara Rix at the Gerontological Society of America’s annual meeting, Boston, MA, November 18–22, 2011.

“Longevity insurance: Does It Solve the Annuity Puzzle?” presented by Sandy Mackenzie at the Gerontological Society of America’s annual meeting, Boston, MA, November 18–21, 2011.

Discussion of papers on the impact of the Great Recession on older Americans, presented by Sandy Mackenzie at the Gerontological Society of America’s annual meeting, Boston, MA, November 18–21, 2011.

Conference summary roundtable at the 2011 Wharton conference “Reshaping Retirement Security: Lessons from the Global Financial Crisis,” presented by Sandy Mackenzie, Philadelphia, PA, May 5–6, 2011.

Health Care

“Consumer Issues and Perspectives in Improving Value,” presented by Lina Walker at the Institute of Medicare workshop on Geographic Variation in Health Care Spending and Promotion of High Value Care, Washington, DC, January 17, 2011.

“Health Care: Why Does It Cost So Much?” presented by Lina Walker at the National Policy Council meeting, Santa Fe, NM, June 7, 2011.

“Medicare Reform: What Are the Options and What Does It Mean for Consumers?” presented by Lina Walker at The Transition Network conference session on Medicare and Social Security Matters: Get the Straight Talk, Washington, DC, November 5, 2011.

“Consumer Perspective on Advancing Pharmacists’ Role in a Reformed Health Care System,” presented by Lee Rucker at the American Pharmacists Association’s Academies Leadership meeting, Crystal City, VA, May 13, 2011.

Lee Rucker presented a consumer perspective on adherence at the American College of Cardiology’s consortium meeting on medication adherence, Washington, DC, May 17, 2011.

Lee Rucker presented on a panel at the New Hampshire Business Magazine’s annual Health Care Summit, Manchester, NH, November 2, 2011.

Susan Reinhard presented the keynote address focusing on current models of care coordination, outcomes, and implications for patient care and professional education at The New York Academy of Medicine Inter-professional Care Coordination conference, New York, NY, May 24, 2011.

Susan Reinhard presented at Academy Health’s Policy Orientation meeting. The discussion focused on the Medicare program and the key health policy challenges that program faces. Washington, DC, October 26, 2011.

“Integrating Care for the Dually Eligible: What Do Consumers What?” presented by Lynda Flowers at a Solutions Forum on Capitol Hill sponsored jointly by AARP’s Public Policy Institute and the Alliance for Health Reform.

“Medicaid and Prescription Drugs,” presented by Leigh Purvis as part of Lynda Flowers’ Medicaid for Medicare Beneficiaries session at the AARP Life @ 50 event, Los Angeles, CA.

“Health Care Comes Home,” presented on a panel by Donald Redfoot at the release of a National Research Council report at the National Academy of Sciences, Washington, DC, August 17, 2011.

Wendy Fox-Grage moderated a workshop session at the Families USA Health Action 2011 conference, January 27, 2011.

Naomi Karp gave a speech on “Health Care, Self-Determination and Autonomy” at a symposium entitled Aging in the US: The Next Civil Rights Movement? at Temple Law School, Philadelphia, PA, on October 22, 2011.

Consumer Protection Issues

Elizabeth Costle presented PPI’s Financial Services and the Older Consumer Award to Robert Mayer of the University of Utah at the American Council of Consumer Interests conference.

Elizabeth Costle presented with Lori Trawinski on the Risk Retention/Qualified Residential Mortgage Rule proposal, the status of AARP’s comment letter, and the current state of the housing market and foreclosures at the National Policy Council’s summer meeting, Santa Fe, NM, June 2011.

Naomi Karp presented with Executive Vice President John Rother and Senior Vice President Susan Reinhard at the Coalition to Transform Advanced Care. Susan Reinhard facilitated the working group on professional education. John Rother presented remarks on advanced illness care policy. Washington, DC, February 10, 2011.

“Adapting Medical-Legal Partnership to Meet the Needs of the Geriatric Population,” presented by Naomi Karp at the National Medical-Legal Partnership Summit, Baltimore, MD, March 25, 2011.

“Advance Directives: Have the Conversations—Stay in Control,” presented by Naomi Karp on a national webinar for AARP members, April 14, 2011.

“Advance Care Planning and POLST,” presented by Naomi Karp at the American Society on Aging Annual Conference, San Francisco, CA, April 28, 2011.

“Standards for Guardian Decision-Making about Healthcare, Finances and Long-Term Care,” presented by Naomi Karp at the American Society on Aging Annual Conference, San Francisco, CA, April 28, 2011.

Naomi Karp and Ryan Wilson presented their research findings on older investors with diminished capacity at an invitational salon sponsored by the National Endowment for Financial Education, Washington, DC, September 22, 2011.

Naomi Karp presented her research on guardian residential decision making at the Third National Guardianship Summit: Standards of Excellence, Salt Lake City, UT, October 13, 2011.

“Consumer Debt Burdens and Solutions,” presented by Lori Trawinski at the roundtable session at the Consumer Federation of America’s 2011 Consumer Assembly, Washington, DC, March 17, 2011.

Lori Trawinski presented with Elizabeth Costle on the Risk Retention/Qualified Residential Mortgage Rule proposal, the status of AARP's comment letter, and the current state of the housing market and foreclosures at the National Policy Council's summer meeting, Santa Fe, NM, June 2011.

Ryan Wilson spoke on issues concerning senior investors at the annual conference of the Securities Industry and Financial Markets Association Compliance and Legal Society, Scottsdale, AZ, March 22, 2011.

Chris Baker presented federal and state policies on maintaining or restoring utility service for consumers faced with medical emergencies at the National Energy and Utility Affordability Conference, Fort Lauderdale, FL, June 29, 2011.

Ryan Wilson spoke as a panelist at an SEC Roundtable on Microcap Securities, October 17, 2011.

Ryan Wilson spoke about "Protecting Investors Who Have Diminished Decision-Making Capacity" at the American Retirement Initiative Summit, Washington, DC, November 3, 2011.

Ryan Wilson, along with the Insured Retirement Institute and the Women's Institute for a Secure Retirement, gave a webinar on serving older investors on November 14, 2011.

Ryan Wilson presented about the older population and protecting senior clients on a webinar open to the life settlement industry on December 7, 2011.

Naomi Karp spoke on advance care planning and physician orders for life-sustaining treatment at the annual meeting of the National Guardianship Association, Minneapolis, MN, October 3, 2011.

Livable Communities

"The Travel Patterns of the 50+: Who's Driving New Trends in Mode Choice," presented by Carlos Figueiredo with Jana Lynott at the Transportation Research Board's NHTS Data Users Conference at the National Academies, Washington, DC, June 2011.

"Planning for America's Future: Planning for Aging," presented by Rodney Harrell at the New Partners for Smart Growth Annual Conference, Charlotte, NC, February 3-5, 2011.

Rodney Harrell presented on Elder Homelessness at the National Alliance to End Homelessness Conference, Washington, DC, July 14, 2011.

"State Housing Profiles," presented by Rodney Harrell at the semiannual meeting of the Housing Statistics Users Group, Washington, DC, September 23, 2011.

“Equity for Community Change—Including Older Adults,” presented by Rodney Harrell as part of a session on “Incorporating Equity in the Process of Community Change” at the Solutions for Sustainable Communities Conference, Washington, DC, September 26, 2011.

“The Future Is Coming: Planning and Policymaking for an Aging Colorado,” keynote address presented by Rodney Harrell at a Livable Communities conference sponsored by the Denver Regional Council of Governments, Denver, CO, September 29, 2011.

Rodney Harrell presented PPI’s work on age and housing location to the group that is developing a Housing Transportation Affordability Index for HUD. Washington, DC, December 1, 2011.

“The Future Is Coming: Planning and Policymaking for an Aging Colorado,” keynote address presented by Rodney Harrell for the NW Colorado Council of Governments’ “Is Our Community Ready for the Age Wave?” Vail, CO, November 17, 2011.

“Creating Livable Communities through Balanced Street Design,” presented by Jana Lynott at the Older Road Users workshop at the Transportation Research Board conference, Washington, DC, January 23, 2011.

“Planning and Designing Complete Streets,” presented by Jana Lynott—in Spanish—to a workshop for Puerto Rico architecture students, architecture, planning and civil engineering professors, and AARP staff and volunteers. Videoconference, Washington, DC, February 7, 2011.

Jana Lynott presented a webinar on Developing Age-Friendly Communities for the American Planning Association, February 23, 2011.

Jana Lynott presented an overview of AARP’s road safety policies at an AARP/America Walks and partners strategy meeting regarding a possible national speed reduction campaign, Washington, DC, March 10, 2011.

“Livable Communities for All Ages: Balancing Needs through the Design of the Road Environment,” presented by Jana Lynott to The Center for Multimodal Solutions for Congestion Mitigation, Gainesville, FL, April 7, 2011.

Jana Lynott presented on “Complete Streets: Intersection Design and Older Road Users” at the Institute of Transportation Engineers’ annual meeting on Toward Zero Deaths, Orlando, FL, April 5, 2011.

“Older Americans Travel: Summary of the 2009 National Household Travel Survey,” presented by Jana Lynott at the American Society on Aging Annual Conference, San Francisco, CA, April 28, 2011.

“The Travel Patterns of the 50+: Who’s Driving New Trends in Mode Choice,” presented by Jana Lynott with Carlos Figueiredo at the Transportation Research Board’s NHTS Data Users Conference at the National Academies, Washington, DC, June 2011.

Jana Lynott presented on “Travel Patterns of Older Adults, Nationwide and in Northern Virginia” at the Arlington County Commission on Aging, Arlington, VA, June 2011.

Jana Lynott presented on “Travel Patterns of Older Adults: Highlights from the 2009 National Household Travel Survey” at the Transportation Research Board Conference Emerging Issues in Safe and Sustainable Mobility for Older People, Washington DC, August 30, 2011.

Jana Lynott presented on “Building Livable Communities for an Aging Society” at the National Conference of State Legislatures, San Antonio, TX, August 2011.

“Preparing Age-Friendly Communities,” presented by Jana Lynott for the Denver Council of Governments Metro Vision Idea Exchange, Denver, CO, October 27, 2011

“Disability Rates and Travel Patterns of Older Adults,” presented by Donald Redfoot with Jana Lynott to the National Policy Council, at AARP, Washington, DC, November 9, 2011.

“Creating Livable and Sustainable Communities that Benefit Older Adults,” presented by Donald Redfoot at the Gerontological Society of America, Boston, MA, November 21, 2011.

Rodney Harrell served as moderator/discussant for a session on “Infusing Culture and Creating Place through Urban Design,” American Planning Association Conference in Boston, April 10, 2011.

Rodney Harrell spoke on “Promoting Health and Safety through Universal Design” at the National Healthy Homes Conference in Denver, the conference is sponsored by the HUD office of Healthy Homes, and Rodney has also served on the planning committee. Denver, CO, June 19-23.

Rodney Harrell moderated a keynote discussion at: “Ensuring Safe, Healthy Homes and Communities for Our Seniors” a forum sponsored by Neighborworks America. August 9, Atlanta, GA

LTSS

Wendy Fox-Grage presented findings from the recently released PPI report, *Weathering the Storm: The Impact of the Great Recession on Long-Term Services and Supports*, on a national call for the State Directors of Aging and Disability Agencies, Washington, DC, January 2011.

“Weathering the Storm: The Impact of the Great Recession on Long-Term Services and Supports,” presented by Wendy Fox-Grage to the Leadership Council of Aging Organizations’ Health and Long-Term Services and Supports Committee members in Washington, DC, February 22, 2011.

“Policy Briefing: California Long-Term Care Policy Forum,” presented by Lynn Friss Feinberg at the American Society on Aging Annual Conference, San Francisco, CA, April 28, 2011.

“Best Practices Featuring Active Community-Based Programs Delivering Medical and Social Services,” presented by Lynn Friss Feinberg at the American Society on Aging Annual Conference, San Francisco, CA, April 28, 2011.

“Lessons from Real People—Brave New World of Aging Advocacy: Post Health Care Reform,” presented by Lynn Friss Feinberg at the American Society on Aging Annual Conference, San Francisco, CA, April 28, 2011.

Ari Houser and Enid Kassner presented at AARP’s 4-State Mid-Atlantic Section of the Mideast Region Training on Long-Term Care (LTC), Long-Term Services and Supports, and Home and Community-Based Services, Washington, DC, November 2, 2011.

Enid Kassner presented on the LTSS Scorecard to a meeting of the Council of State Governments, Bellevue, WA, October 2011.

Enid Kassner presented on the LTSS Scorecard at a plenary session of the annual conference of the Consumer Voice for Quality LTC, Grand Rapids, MI.

“How Long-Term Care Is Weathering the State Financial Storm & Trends in Disability, Community Living, and Caregiving,” presented by Don Redfoot and Wendy Fox Grage to The Long-Term Care Discussion Group, Washington, DC, March 15, 2011.

“Person-Centeredness: How Will Providers Know if They Are Achieving It and What Consumers Should Look For,” presented by Donald Redfoot in Boston, MA, November 18–21, 2011.

Susan Reinhard presented at the Long-Term Care conference entitled: “Implementing the Long-Term Care Provisions of the Affordable Care Act in Illinois” *A National & State Perspective* Chicago, IL, January 25, 2011.

Susan Reinhard was the keynote speaker at Portland State University’s Aging Matters Initiative Summit, Portland, OR, February 4, 2011.

“The Impact of the Economic Downturn on Long-Term Services and Supports,” presented by Susan Reinhard at the American Society on Aging Annual Conference, San Francisco, CA, April 29, 2011.

Susan Reinhard presented a keynote focusing on person-centered planning, informed choice, and nurse delegation at Connecticut’s first statewide conference on Informed Risk When Choosing Community-Based Long-Term Care Services and Supports, Cromwell, CT, June 27, 2011.

“Cross-Atlantic Experiences in Long-term Care,” presented by Susan Reinhard, showcased PPI research at the International Health Economics Association conference, Toronto, Canada, July 12, 2011.

Susan Reinhard presented the development and preliminary findings of the State LTSS Scorecard at the National Association of Area Agencies on Aging's Annual Conference & Tradeshow, Washington, DC, July 19, 2011.

Susan Reinhard presented "Breaking through the Complexity of LTSS Data" at a plenary session of the NASUAD National Home and Community-Based Services Conference, Washington, DC, September 13, 2011.

Susan Reinhard highlighted the results of the State LTSS Scorecard at the Long-Term Care Summit organized by AARP Arkansas and the Arkansas Division of Aging & Adults, Little Rock, AR, September 22, 2011.

Susan Reinhard presented "How Does California's LTSS System Compare with Other States?" at the Summit on Transforming California's Long-Term Services and Supports, organized by the SCAN Foundation, September 27, 2011.

Susan Reinhard presented results of the State Long-Term Services and Supports Scorecard at the Grantmakers in Aging 2011 Annual Conference, October 27, 2011.

Susan Reinhard presented on "AARP Perspectives on Managed Long-Term Services and Supports" at the National Association of Medicaid Directors conference, Arlington, VA, November 9, 2011.

"Evidence Based Efforts to Improve Long Term Care Services," presented by Susan Reinhard at the Gerontological Society of America's annual meeting, Boston, MA, November 18, 2011.

Enid Kassner presented a plenary presentation on the LTSS Scorecard at the New Jersey LTC Summit, New Brunswick, NJ, December 9, 2011.

Enid Kassner presented with Ari Houser on the LTSS Scorecard to the AARP South Central Region advocacy meeting via webinar, December 8, 2011.

Enid Kassner presented a webinar on the LTSS Scorecard and its implications for states that want to implement the Balancing Incentives Payment Program to the Friday Morning Collaborative group, October 7, 2011.

Enid Kassner presented a webinar on the LTSS Scorecard to the Money Follows the Person grantees on November 9, 2011. The webinar had close to 100 participants.

Enid Kassner presented with Ari Houser on the LTSS Scorecard to a meeting of the South-Central Region states via videoconference on December 8, 2011.

Enid Kassner presented on the LTSS Scorecard at the New Jersey LTC Summit, New Brunswick, NJ, December 9, 2011.

Caregiving

Rita Choula presented on the grant *Professional Partners Supporting Family Caregivers – Phase II* at a meeting of the National Coalition on Mental Health and Aging, Washington, DC, March 2011.

Rita Choula presented at the 2011 NICHE Conference, April 8, 2011.

“Professional Partners Supporting Diverse Family Caregivers,” presented by Rita Choula with Susan Reinhard at the American Society on Aging Annual Conference, San Francisco, CA, April 29, 2011.

“Family Caregiving in America: The New Normal,” presented by Rita Choula at a plenary session of the 2011 Meeting of the Veterans Administration Family Caregiver Support program, Washington, DC, August 2011.

Rita Choula presented with Susan Reinhard at the NASUAD National Home and Community Based Services Conference, Washington, DC, September 13, 2011.

Lynn Friss Feinberg presented on support for family caregivers at the 2011 Money Follows the Person Summit, Baltimore, MD, September 2011.

“Outsourcing Gender Equality Issues to the Global Market: Female Migrant Care Workers,” presented by Donald Redfoot at a conference at the Woodrow Wilson Center, Washington, DC, October 20, 2011.

Susan Reinhard presented a keynote address focusing on professionals learning to recognize and support the family caregiver as an individual at the Seventh Annual Meridian Health Ann May Center’s Geriatric Evidence-Based Practice Conference, Long Branch, NJ, June 3, 2011.

Lynn Friss Feinberg served as a panelist at the Generations United event at the National Press Club on around the release of their new report, *Family Matters: Multigenerational Families in a Volatile Economy*, Washington, DC, December 6, 2011.

Enid Kassner presented on issues in family caregiving to 100 AARP chapter representatives at the New Jersey LTC Summit, New Brunswick, NJ, December 9, 2011.

Future of Nursing

“The Future of Nursing: *Campaign for Action*,” presented by Julia Alexis to the board of the Visiting Nurses Association of America to secure this group’s involvement in the Champion Nursing Coalition, Washington, DC, January 27, 2011.

“The Future of Nursing: *Campaign for Action*,” presented by Julia Alexis at the American Federation of County State and Municipal Employees Nursing Congress, Washington, DC, May 2011.

Andrea Brassard presented a keynote address at the American College of Nurse Practitioners 2011 National Nurse Practitioner Summit and Leadership Conference, Washington, DC, February 26, 2011.

“The Future of Nursing: *Campaign for Action*,” presented by Andrea Brassard to The Health Management Academy Chief Nursing Officers’ Spring Forum, March 22, 2011.

“The Future of Nursing: *Campaign for Action*,” presented by Andrea Brassard to the Aligning Forces for Quality, Transforming Care at the Bedside (TCAB) Biannual Meeting, Baltimore, MD, April 8, 2011.

“State Practice Laws in the Age of Reform: How Will We Meet the Demands of Increased Coverage?” presented by Andrea Brassard to the American Hospital Association State Issues Forum, Washington, DC, April 9, 2011.

“The Future of Health Care: Advanced Practice Registered Nurses,” presented by Andrea Brassard on a live Nurse.com webinar with more than 285 attendees, May 2011.

“The Future of Nursing: *Campaign for Action*,” presented by Andrea Brassard to the DC Organization of Nurse Executives, Washington, DC, May 2011.

“The Future of Nursing: *Campaign for Action*,” presented by Andrea Brassard to the incoming masters students at the George Washington University School of Nursing, Washington, DC, August 19, 2011.

“Nursing in America,” presented by Andrea Brassard as part of the George Washington University Residency Fellowship in Health Policy, to physicians representing internal medicine, psychiatry, pediatrics, anesthesiology, and general surgery, Washington, DC, September 2011.

“The Future of Nursing: *Campaign for Action*,” presented by Andrea Brassard at the fall conference of the Northern Virginia Regional Perinatal Council and the Inova Learning Network of Inova Health System in collaboration with the March of Dimes.

“The Future of Nursing: Implications for Occupational Health Nurses,” presented by Andrea Brassard to the Washington Association of Occupational Health Nurses, November 16, 2011.

“The Future of Nursing: *Campaign for Action*,” a nationwide webinar presented by Pat Polansky to the National Association of Public Hospitals and Health Systems.

Winifred Quinn presented to Kaiser Permanente regional health and systems plans on “The Future of Nursing: *Campaign for Action*” and how to join campaign efforts at the state level, January 26, 2011.

“The Future of Nursing: *Campaign for Action*,” presented by Winifred Quinn to the Healthcare Division Leadership Team of the American Federation of Teachers, Washington, DC, January 19, 2011.

“The Regulatory Process—The Patient and Consumer Perspective,” presented by Winifred Quinn to the American College of Nurse Practitioners’ Public Policy Institute, Washington, DC, February 24, 2011.

Winifred Quinn presented a poster session on “Nursing Provisions in Health Care Reform That Will Increase Access to Care for Older Adults” at the American Society on Aging Annual Conference, San Francisco, CA, April 28, 2011.

“Nursing Delegation and Consumer Directed Care,” presented by Winifred Quinn at an Eldercare Workforce Alliance-sponsored briefing to discuss the state of the nation’s eldercare workforce and strategies to address the crisis, Capitol Hill, Washington, DC, May 2011.

Winifred Quinn presented on “The Future of Nursing: *Campaign for Action*” to the Maine Organization of Nurse Executives, Freeport, ME, October 28, 2011.

Winifred Quinn presented to CEOs from chronic care management organizations at a National Press Club summit on the *Campaign for Action* founded upon the Institute of Medicine report *The Future of Nursing: Leading Change, Advancing Health*, Washington, DC, October 21, 2011.

Winifred Quinn presented on “The Future of Nursing: *Campaign for Action*” to the Maine Organization of Nurse Executives, October 28, 2011.

Susan Reinhard hosted a convening of more than 70 nursing and health care, business, and consumer leaders to discuss leveraging the recommendations of the Institute of Medicine’s landmark report, *The Future of Nursing: Leading Change, Advancing Health*.

Susan Reinhard presented at the 2011 National Association of Clinical Nurse Specialists Annual Conference. The discussion, “Nurses and Consumers: Partnership for the Future,” focused on how clinical nurse specialists can advance health through nursing. Baltimore, MD, March 10, 2011.

Susan Reinhard presented a summary of the Institute of Medicine’s report, *The Future of Nursing: Leading Change, Advancing Health*, at the Fourth Annual Statewide Nursing Summit, Indianapolis, IN, April 1, 2011.

“The Future of Nursing Initiative: Leading Change, Advancing Health,” keynote presented by Susan Reinhard at the Fourth Annual Upper Midwest Geriatric Nursing Education Alliance Meeting, Minneapolis, MN, June 8, 2011.

Susan Reinhard presented an address that examined implications of findings from the IOM report on strengthening geriatric nursing education at the Fourth Annual Upper Midwest Geriatric Nursing Education Alliance Meeting, Minneapolis, MN, June 9, 2011.

Susan Reinhard presented on a webinar for 12 western states focusing on the Institute of Medicine's recommendation to increase the proportion of nurses with a baccalaureate degree to 80 percent by 2020. June 2011.

Susan Reinhard presented on two webinars to the Southeast (19 states) and Midwest (15 states) regions focusing on the Institute of Medicine's recommendation to increase the proportion of nurses with a baccalaureate degree to 80 percent by 2020. June 2011.

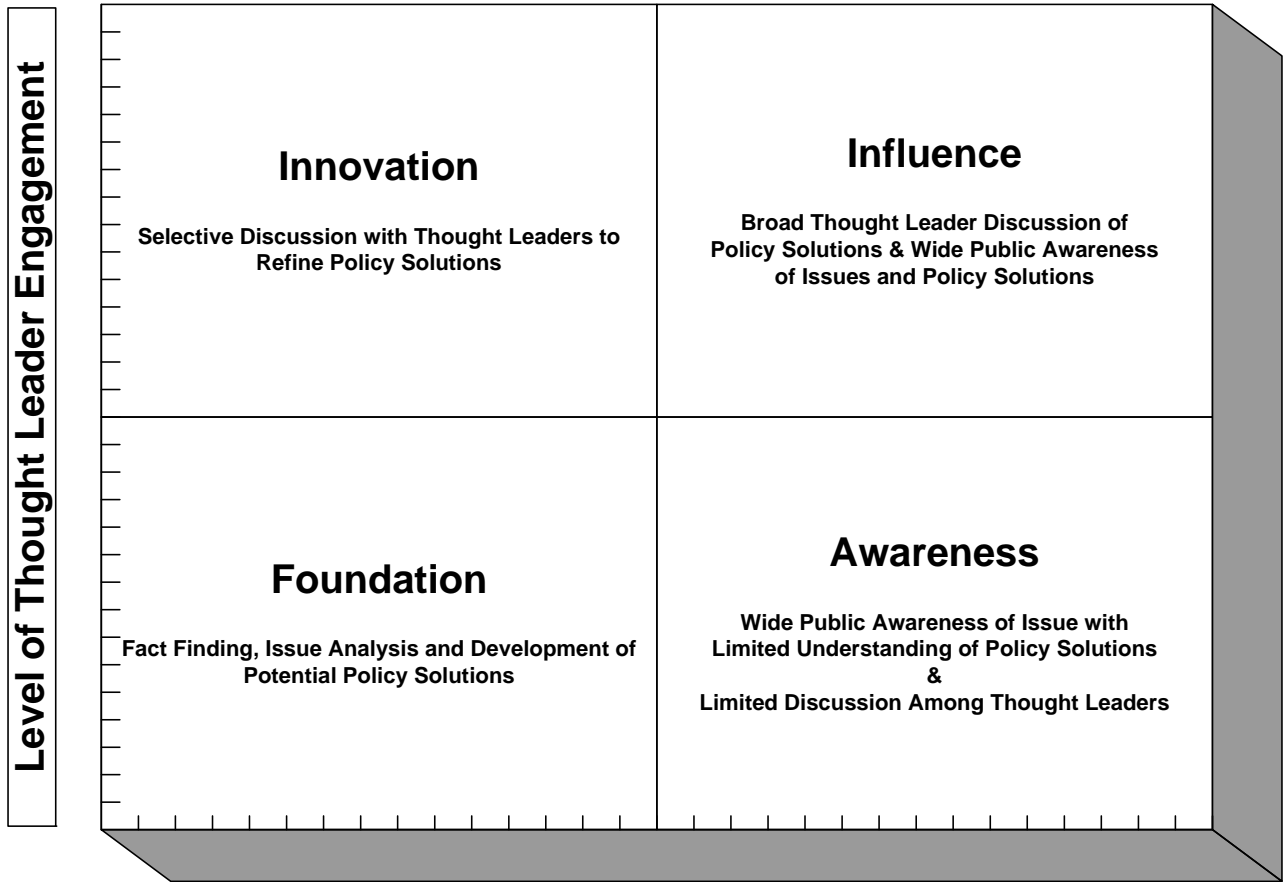
Susan Reinhard presented on how to advance the IOM recommendations to increase nursing leadership at the Champion Nursing Council and Champion Nursing Coalition Strategy Meeting, July 27, 2011.

Susan Reinhard presented the keynote presentation on the IOM Future of Nursing Report at the National Council of State Boards of Nursing Long-Term Care Conference, August 23, 2011.

Susan Reinhard presented at the 2011 International Nursing Administration Research Conference, sponsored by the Council for Graduate Education in Nursing. The presentation focused on the Future of Nursing *Campaign for Action* and the Affordable Care Act. Denver, CO, October 12, 2011.

Susan Reinhard presented keynote presentations on "The Future of Nursing: *Campaign for Action*." The first keynote was delivered at a summit hosted by the New York State Action Coalition, Albany, NY, October 19–21, 2011.

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