AARP PUBLIC POLICY INSTITUTE

ANNUAL REPORT

2013
AARP PUBLIC POLICY INSTITUTE
ANNUAL REPORT
2013

HIGHLIGHTS

PUBLICATIONS

Middle-Class Security Project Reports
Economic Security
Health Care
Long-Term Services and Supports
Livable Communities
Consumer Protection
Caregiving

EVENTS

Solutions Forums
Innovation Roundtables
CCNA Conferences and Meetings
CCNA Webinars

STRATEGIC INITIATIVES

Center to Champion Nursing in America (CCNA)
Overview
Stakeholder Engagement
Technical Assistance Summary
Public Policy
Impact
ReACT
State Long-Term Services and Supports Scorecard

SELECTED PRESENTATIONS

Economic Security
Health Care
Consumer Protection Issues
Livable Communities
Long-Term Services and Supports (LTSS)
Caregiving
Future of Nursing
HIGHLIGHTS

Overview

The Public Policy Institute (PPI) informs and stimulates public debate on the issues we face as we age. Led by AARP Senior Vice President Susan Reinhard, PPI spearheads public policy analysis at AARP and develops policy options designed to significantly improve economic security, health care, and quality of life for older Americans.

In 2013, PPI staff released 76 major policy reports and published 65 blogs on current policy issues. The institute held six high-profile public Solutions Forums and eight Innovation Roundtables on policy development. In addition, PPI staff gave 138 presentations at conferences and stakeholder meetings around the country. PPI reports, available at http://www.aarp.org/ffi, were downloaded 55,000 times in 2013.

PPI in the Media

Media coverage of PPI reports and citation of PPI experts appeared in hundreds of major media and trade press articles in 2013. Early in the year, AARP CEO Barry Rand released a series of PPI reports on threats to middle-class retirement security in a speech at the National Press Club. Major media (U.S. News, Financial Times, ABC, NBC, CBS, Bloomberg, USA Today, Reuters, and others); political media (Politico, Fiscal Times, Huffington Post, Weekly Standard, The Hill, and others); and metro media across the country reported on key themes, including findings that:

- The middle class is being squeezed by falling incomes, dwindling savings, and the rising costs of health care, housing, and education.
- Workers today are less likely to be as secure in retirement as their parents.
- More older Americans are working past 65, and average debt for older Americans is rising, with many carrying higher credit card debt.

Media coverage during 2013 also frequently cited PPI analysis and staff on key issues, such as:

- The potential impact on older Americans of a proposal to adopt the chained CPI as the basis for Social Security cost-of-living increases.
- High unemployment among older Americans and the length of time it takes many to find another job.
- A predicted shortage in the availability of family caregivers; findings that family caregivers are taking on more complex medical tasks; and how to help family caregivers, especially those who are working.
- How to boost retirement saving, particularly through state-sponsored workplace plans.
- Lack of resources to address a growing need for long-term services and supports delivered at home instead of institutional care.

- Impact of the Affordable Care Act (ACA) on health care for Americans aged 50-plus.


PPI publications are increasingly referenced in publications relevant to policy experts and key stakeholders, such as Spotlight on Poverty, Retirement Income Journal, Public Policy and Aging, Kaiser Health News, AoA News, Caregiving Policy Digest, and newsletters sent out by the National Governors Association, National Conference of State Legislatures, National Association of States United for Aging and Disabilities, Boston College Retirement Center, National Coalition on Care Coordination, and many other organizations and government agencies.

**PPI on the Web/Social Media**

Unique visitors to PPI’s website averaged 20,000 per month in 2013. Downloads of PPI reports from the site increased to an average of close to 5,000 reports a month.

Launched in 2013, PPI’s Twitter account has attracted 3,000 followers, and the recently launched PPI Facebook page has 6,000 followers. PPI blog posts, particularly a series on Long-Term Services and Supports, were cited frequently in national stakeholder online publications.

PPI also added an interactive tool to its website this year that provides data on the use of recommended clinical preventive services and the prevalence of risk factors among adults aged 50 to 64 across racial and ethnic groups, income levels, educational attainment, and health insurance coverage status. The tool provides data for each state as well.

In addition, PPI created and launched an interactive website that highlights key information and best practices for assisting employed caregivers.

The website for the Center to Champion Nursing in America (CCNA), cosponsored by AARP and the Robert Wood Johnson Foundation and managed by PPI, had an average of close to 8,000 unique visitors per month in 2013. CCNA newsletters reach nearly 3,000 subscribers. CCNA has close to 4,000 Twitter followers and 12,000 Facebook fans.
In 2013, PPI staff published more than 75 reports, along with an additional 51 state fact sheets providing details on the importance of Social Security and Medicare. Those with strong media coverage or high impact included the following:

- **Middle-Class Security.** These research papers explore the well-being of America’s middle class with a focus on prospects for financially secure retirement.

- **The Employment Situation.** PPI’s reports on the difficulties of older workers received consistent national coverage and appeared reconstituted as a series of blogs by PPI’s Sara Rix in the Huffington Post.

- **Inflation Indexation in Major Federal Benefit Programs: Impact of the Chained CPI.** This paper shows how using the chained CPI would affect Social Security beneficiaries as well as beneficiaries of other programs such as Supplemental Security Income, Medicaid, Medicare, veterans’ retirement and disability programs, and poverty-prevention programs. This paper provided a crucial factual basis for AARP’s public education on the chained CPI.

- **The Importance of Social Security and Medicare: Individual State Profiles.** These fact sheets provide details on the number of seniors who count on Social Security for retirement security; the percentage of middle-income seniors kept out of poverty by Social Security; the number of Medicare beneficiaries; and the role of Social Security and Medicare in state economies. The fact sheets were central to educational efforts by AARP state offices across the nation.

- **Social Security’s Impact on the National Economy.** This paper provides an analysis of Social Security’s effects on state and national employment, output, and labor income. It highlights the macroeconomic effect of cutting Social Security.

- **Use of Clinical Preventive Services and Prevalence of Health Risk Factors among Adults Aged 50–64.** This report examines differences in the utilization of highly recommended preventive services among adults aged 50 to 64 at the national and state levels, with a focus on socioeconomic factors and health care access. It provides state-level data for use by state policy makers.

- **Rapid Growth in Medicare Hospital Observation Services: What’s Going On?** This analysis looks at the impact of using hospital observation services instead of inpatient admission for Medicare beneficiaries, especially those who are discharged to a skilled nursing facility. It addresses an issue of immediate financial concern for thousands of beneficiaries.

- **At the Crossroads: Providing High-Demand LTSS in a Time of Fiscal Constraint—Research Report.** This paper showed that many states are implementing Affordable Care Act long-term services and supports (LTSS) options that increase access to Medicaid
home- and community-based services. It also shows that non-Medicaid funding has lagged in most states.

- **Choosing Home for Someone Else: Guardian Decision on Long-Term Services and Supports.** This paper calls attention to how professional guardians decide where incapacitated adults should live and offers recommendations for improving the process.

- **The Aging of the Baby Boom and the Growing Care Gap: A National and State-by-State Look at Future Declines in the Availability of Family Caregivers.** This paper, which received widespread media attention, uses a “caregiver support ratio” to document the declining availability of family caregivers to provide LTSS between 1990 and 2050.

- **Employed Family Caregivers Providing Complex Chronic Care.** This paper takes a close look at challenges facing family caregivers who perform medical/nursing tasks for family members while employed.

- **Heating, Cooling, and Utility Cost Reports.** These regular updates show how rising costs are affecting low-income seniors.

**Events**

PPI held six high-profile Solutions Forums in 2013 addressing issues of importance to older Americans, with a focus on economic security and access to health care. Speakers included some of the nation’s leading experts and policy makers.

Held in collaboration with other national organizations, such as the Alliance for Health Reform and the U.S. Chamber of Commerce, PPI Solutions Forums drew more than 1,000 policy makers and analysts, Hill staff, academic experts, government officials, and stakeholder leaders.

Three of these forums were covered live and broadcast nationally by C-SPAN. Forums focused on the following:

- **Cost-of-Living Adjustments and Federal Benefits: Understanding the Full Implications of Change**
- **How to Improve Care and Lower Costs in Medicare: Promising Approaches**
- **Rethinking Retirement: Moving ahead without Leaving Anyone Behind**
- **Retirement Savings in Australia, Asia and Beyond: What Are the Lessons for the U.S.?**
- **Modernizing Medicaid: Putting Home- and Community-Based Services on Equal Footing with Nursing Homes**
- **Hospital Observation Status: Am I in the Hospital or Not? Why Hospitals Are “Observing”—Not Admitting—Patients**
PPI held eight Innovation Roundtables in 2013, bringing together leading national experts to discuss the development of policy options on key issues. These off-the-record meetings promote candid dialogue among stakeholders, experts, and policy makers with the goal of bridging ideological gaps in search of solutions. Roundtables in 2013 included the following:

- Consumer Choice and Continuity of Care in Managed Long-Term Services and Supports: Emerging Practices and Lessons
- Family Caregivers Providing Complex Chronic Care
- Disability and Work
- Age-Friendly Banking
- Raising the Visibility: Identifying the Needs of Multicultural Family Caregivers
- Tapping the Potential of Nurses in Health Care Delivery
- Physician Payment Reform
- Out of Work at 50+: Crafting a Workforce Development System That Better Meets the Needs of Older Jobseekers and Workers

The Center to Champion Nursing in America held six major Future of Nursing: Campaign for Action meetings and conducted 16 national webinars in support of the Campaign in 2013.

Presentations

In 2013, PPI staff gave 138 presentations at conferences and stakeholder meetings across the country, with a strong focus on the following issues:

- Improving retirement saving and security.
- Medicare reform options.
- Protection for older investors.
- Transportation needs of older adults and building age-friendly communities.
- State performance delivering long-term services and supports as identified by AARP’s State LTSS Scorecard.
- The challenges facing family caregivers, particularly working caregivers and those providing health care, and policy options to better support caregivers.
- Impact of Medicaid expansion under the ACA and delivery of health care services for people dually eligible for Medicare and Medicaid.
- Efforts of the Future of Nursing: Campaign for Action to help transform health care.
Strategic Initiatives

The Center to Champion Nursing in America (CCNA) stepped up its volume of work and outreach in 2013 to promote public and private policy solutions in nursing and health care delivery. In October, CCNA embarked on its fourth year coordinating the activities of the Future of Nursing: Campaign for Action, an initiative of AARP and the Robert Wood Johnson Foundation. The Campaign is a national initiative to ensure that everyone in America can live a healthier life, supported by a system in which nurses are essential partners in providing care and promoting health.

In 2013, CCNA managed a network of 51 Campaign for Action state-based Action Coalitions. To broaden its reach, CCNA involved 34 AARP state offices in a growing network of organizations that see the value of the Campaign and its goals. Nationally, CCNA conducted stakeholder engagement efforts with more than 80 national health care, business, consumer, and education groups. In addition, CCNA staff gave over 47 presentations to stakeholder organizations around the nation.

CCNA continued to work with its Champion Nursing Coalition—55 leading business, health care, consumer, and insurer groups supporting the Campaign’s efforts. Coalition members have advocated for AARP-supported legislation, including the Home Health Care Planning Improvement Act of 2013 and several key state bills to expand consumer access and choice. Other Coalition members have taken important steps to advance nursing leadership by placing nurses on their boards of directors.

Several states have modernized their scope of practice laws that pertain to advanced practice registered nurses. Nevada passed a law that allows nurse practitioners to practice to the top of their education and training without physician oversight. In Utah, Medicaid now recognizes nurse practitioners as primary care providers and will reimburse them as such. Although a similar bill in California did not pass this year, AARP California and the national office put extensive resources into supporting the bill.

CCNA continued to increase the visibility of nursing issues and the diversity of stakeholders involved in addressing them. The technical assistance provided by CCNA has helped nursing leaders in states become familiar with best practices and innovations throughout the country.

ReACT

ReACT (Respect A Caregiver’s Time) was launched in 2010 as an employer-focused coalition dedicated to addressing the challenges faced by working caregivers as well as reducing the impact on the companies that employ them.

This coalition, funded by Pfizer and the members of the coalition, is dedicated to increasing awareness, understanding, and action around issues faced by working caregivers. To support this effort, Pfizer provided a grant to PPI to develop a new online resource guide for employers. In 2013, PPI created and launched an interactive website that highlights key information and best practices for assisting employed caregivers.

The launch event at the U.S. Chamber of Commerce on November 20, 2013, reached an estimated 70,000 people across the United States and Canada.
BUILDING LIFETIME MIDDLE-CLASS SECURITY

This synthesis of research findings from the Middle-Class Security Project shows that if current economic trends continue, living standards in retirement will decline; rising health care costs pose a significant threat to middle-class security; and Social Security will be the main source of income for all but the wealthiest retirees in the future. The paper points out that the middle class is besieged by stagnating income; escalating debt; and rising costs for housing, education, and health care. It notes that middle-class security in retirement takes a lifetime to build—and that a threat to one generation undermines security for all. Authors: Redfoot, Donald L. (PPI); Reinhard, Susan C. (AARP Senior Vice President and Director, PPI); Whitman, Debra B. (AARP Executive Vice President for Policy, Strategy and International)

WHAT ARE THE RETIREMENT PROSPECTS OF MIDDLE-CLASS AMERICANS?

Workers today are less likely than their parents or grandparents to enjoy the living standards of their working years when they retire. Much of the projected decline is expected because health care costs are rising faster than wages. That’s the key message from this report based on an analysis using the Urban Institute’s dynamic micro-simulation model. This report projects the retirement security prospects for middle-class workers aged 25 to 54 in 2012 compared to current retirees. Average retiree income is projected to fall from 80% of average career earnings for current retirees to 73% for future retirees. Factoring in higher health care costs, the report shows retiree income falling to 55% of average career earnings. Authors: Butrica, Barbara (Urban Institute); Waid, Mikki (PPI)


This study examines the middle-class balance sheet by age and how its components have changed over time using data from the Federal Reserve’s Survey of Consumer Finances. The study finds that average debt of the middle class has increased significantly since 1989, with Americans over age 50 experiencing the sharpest rates of increase and younger families carrying the largest amounts of debt. This trend presents a threat to the long-term financial security of middle-class families of all ages. Author: Trawinski, Lori A. (PPI)

TRACKING THE DECLINE: MIDDLE-CLASS SECURITY IN THE 2000S

The security of the middle class has faltered in the wake of the recession, a trend expected to have long-lasting effects as Americans move toward retirement. Among working-age middle-income families, the proportion defined as “secure” fell by 38 percent from 2004 to 2010 and the proportion defined as “vulnerable” grew by 42 percent. These findings are based on a new Middle-Class Tracking Index that measures five factors important to middle-class security: income, health insurance coverage, housing affordability, money for extras and savings, and assets to cover an emergency. Authors: Meschede, Tatjana (IASP Research Director, Brandeis
The Elusive Middle in America—What Has Happened to Middle-Class Income?
This paper notes that most Americans identify themselves as middle class and that “middle class” is not synonymous with “middle income.” However, researchers typically use income as an indicator of membership in the middle class. The paper looks at what it means to be “middle class” using three income-based definitions, and analyzes economic trends affecting Americans in the middle-income brackets. Significantly, the paper shows that the percentage of adults considered middle income has dropped about 10 percentage points since 1970, from about 61 percent to 51 percent. More recently, from 2000 to 2011, median income fell about 8 percent and was lower in 2011 than it was in 1997. Author: Koenig, Gary (PPI)

In the Red: Older Americans and Credit Card Debt
This research examines how the recession, its aftermath, and implementation of new consumer credit card protections have affected credit card debt, with a focus on differences by age bracket. Among middle-income households carrying credit card debt for three months or more, it finds that older Americans now have higher overall credit card debt than younger people—a reversal of the trend Dēmos found in a 2008 survey. It also shows that half of older Americans carry medical expenses on their credit cards, and nearly one in five (18 percent) of people aged 50 to 64 reported that they drew on retirement funds to pay off credit card debt. Author: Traub, Amy (Dēmos)

The Effects of Rising Health Care Costs on Middle-Class Economic Security
Rising health care costs and declining health insurance coverage are jeopardizing the health and financial security of middle-class families. This report examines recent trends in health care and insurance costs and how they contribute to the financial stress and insecurity experienced by middle-class American households during their working and retirement years. The report finds that health care spending grew at more than twice the rate of inflation between 2000 and 2010, and that middle-income households spent 51 percent more on health care in 2010 than a decade earlier. In 2011, one in three people were in families facing a financial burden from medical bills, and one in five were in families having trouble paying those bills. Author: Komisar, Harriet (Georgetown University)

The Loss of Housing Affordability Threatens Financial Stability for Middle-Class Older Adults
Housing costs are contributing to a decline in financial stability for an increasing number of 50-plus households, with older middle-class households increasingly facing higher housing cost burdens. Key findings from this research show that the percentage of middle-income households aged 50-plus that are paying more than 30 percent of their incomes on housing rose sharply, from 20 percent in 2000 to 29 percent in 2009. It also shows that more than half (53 percent) of the 50-plus foreclosures were in middle-income households in 2011, and that African American and Latino households lost more than half of their wealth between 2005 and 2009. Authors: Harrell, Rodney (PPI); Guzman, Shannon G. (PPI)
How Older Americans Are Dealing with New Economic Realities
Struggling older middle-class Americans tell their stories in this summary of focus groups held in Milwaukee, Philadelphia, and Tampa. Participants stressed the importance of Medicare and Social Security in maintaining security and highlighted experiences coping with loss of financial security, including loss of savings and home values; increasing costs of meeting basic needs such as health care, housing, and food; and increasing difficulties with debt, particularly mortgages and credit card debt. Author: Undem, Tresa (Lake Research Partners)

Stories of Middle-Class Struggle (Video Portraits)
The Middle-Class Security Project also produced videos revealing the financial pressures facing five middle-class Americans aged 60-plus, including an advocate for the homeless in Philadelphia who loses her own home; a couple in Florida that finds retirement elusive; a Tampa man who experiences a “lost decade” looking for work in his preretirement years; a man in Milwaukee who loses a secure retirement to disability; and a Milwaukee family that loses income and health benefits. Producer: Deutsch, Richard (PPI)

Economic Security

Social Security: A Key Retirement Income Source for Older Minorities—In Brief
January 2013—A look at why Social Security is important for the economic well-being of all older Americans, especially for minorities. Social Security is the main source of income for low- and moderate-wage retirees, many of whom are minorities. Author: Waid, Mikki (PPI)

Employment Situation: Five Years After the Start of the Great Recession—Fact Sheet
January 2013—This AARP Public Policy Institute fact sheet looks back at employment developments during those 5 years, comparing three age groups: 16 to 24, 25 to 54, and 55-plus over the 5-year period. It also provides a snapshot of the December 2012 employment situation based on data released by the Bureau of Labor Statistics on January 4, 2013. Author: Rix, Sara (PPI)

Employment Situation January 2013: Jobs Added to the Economy but Unemployment for Older Workers Holds Fast—Fact Sheet
February 2013—The new year started on a positive note, with nonfarm payroll employment increasing by an estimated 157,000 in January. In addition, the estimated increase in nonfarm employment for December was revised upward from 155,000 to 196,000. Author: Rix, Sara (PPI)

Employment Situation February 2013: A Lower Unemployment Rate for Older Workers but Not Much Improvement in Other Indicators—Fact Sheet
March 2013—The overall unemployment rate fell from 7.9 percent in January to 7.7 percent in February. The rate also fell for the aged 55-plus workforce, from 6 percent to 5.8 percent. Older men had an unemployment rate of 6 percent in February compared to 6.2 percent in January, while older women saw their unemployment rate decline from 5.9 percent to 5.6 percent between January and February. Author: Rix, Sara (PPI)
Inflation Indexation in Major Federal Benefit Programs: Impact of the Chained CPI—Fact Sheet
March 2013—This fact sheet discusses how using the chained CPI would affect Social Security beneficiaries, as well as beneficiaries of other programs such as Supplemental Security Income, Medicaid, Medicare, veterans’ retirement and disability programs, and poverty-prevention programs. Author: Shelton, Alison (PPI)

An Uphill Climb: Important Facts about Women’s Retirement Preparedness—Fact Sheet
April 2013—This fact sheet provides key facts on the current economic status of older women and their retirement well-being. Author: Waid, Mikki (PPI)

Employment Situation March 2013: Discouraging News for the Older Workforce—Fact Sheet
April 2013—There was no increase in the employment of older (aged 55-plus) workers, even though their unemployment rate fell from 5.8 percent to 5.5 percent. More older Americans were out of the labor force in March than the month before. Average duration of unemployment crept upward, as did the number of discouraged and involuntary part-time workers. Author: Rix, Sara (PPI)

Employment Situation April 2013: Neither Much Better Nor Much Worse for Older Workers—Fact Sheet
May 2013—The unemployment rate for those aged 55-plus remained flat at 5.5 percent. Just over 1.8 million older Americans were unemployed in April, essentially unchanged from March but 191,000 fewer than a year earlier. Average duration of unemployment rose but also remained lower than in April 2012. The number of discouraged workers increased in April, but that figure, too, was lower than it had been a year earlier. Author: Rix, Sara (PPI)

Employment Situation May 2013: Some Good News for Older Workers Tempered by Continuing Problems—Fact Sheet
June 2013—The unemployment rate for older workers fell from 5.5 percent to 5.3 percent, but the decline was concentrated among women. Nearly 1.8 million older Americans were unemployed in May, 65,000 fewer than in April and 330,000 fewer than 1 year earlier. Average duration of unemployment crept back up and once again exceeded one year. The number of involuntary part-time workers was unchanged from May but still above what it had been at the start of the Great Recession. Author: Rix, Sara (PPI)

Employment Situation June 2013: Less Than Meets the Eye?—Fact Sheet
July 2013—Although nonfarm payroll employment increased by 195,000 between May and June (a greater increase than anticipated), the unemployment rate for older workers remained at 5.3 percent. Nearly 1.8 million older Americans were unemployed in June. Other indicators, such as the labor force participation rate, number employed and unemployed, and percentage employed (employment-to-population ratio), also showed little or no change for the older population. Average duration of unemployment did fall between May and June, but the number of discouraged older workers was up. Author: Rix, Sara (PPI)
New Ways to Promote Retirement Saving—In Brief
July 2013—This Research Report proposes retirement saving reforms designed to help boost saving among low- and middle-income households. These 11 proposals are grouped under five themes: (1) making saving easier, (2) making saving more rewarding, (3) strengthening the market infrastructure for saving, (4) providing private information to savers, and (5) improving public education for saving. Authors: Gale, William G. (Brookings Institution); John, David C. (PPI); and Smith, Spencer (Brookings Institution)

Employment Situation July 2013: Unemployment Drop for Older Workers Does Not Translate into Employment Gain—Fact Sheet
August 2013—The unemployment rate for the aged 55-plus workforce fell to 5.0 percent from 5.3 percent, but the number with jobs showed little change and the percentage employed (employment-to-population ratio) remained flat. After falling in June, the average duration of unemployment edged upward in July. Author: Rix, Sara (PPI)

Employment Situation August 2013: Sputtering Along—Fact Sheet
September 2013—At 5.1 percent, the unemployment rate for the aged 55-plus workforce was little changed from July’s 5.0 percent. Nor did the percentage employed (employment-to-population ratio) show much change. Average duration of unemployment edged upward once again in August. Author: Rix, Sara (PPI)

Employment Situation September 2013: Almost No Good News for the Older Workforce—Fact Sheet
October 2013—Nonfarm payroll employment, as reported by establishments, rose by an estimated 148,000 in September. Average duration of unemployment for jobseekers aged 55 and older rose in September to 55.4 weeks from 50.4 weeks in August. Jobseekers under age 55 had been unemployed for an average of 34.3 weeks in September, virtually unchanged from August’s 34.2 weeks. Author: Rix, Sara (PPI)

Employment Situation October 2013: Not Much Changed for Older Workers—Fact Sheet
November 2013—The October unemployment rate for the workforce aged 55 and older—5.4 percent—was little changed from September’s 5.3 percent. Although below the rate of 5.8 percent in October 2012, it was still much higher than at the start of the Great Recession: 3.2 percent. Author: Rix, Sara (PPI)

Social Security: Who’s Counting on It—Fact Sheet
August 2013—This fact sheet illustrates the importance of resolving Social Security’s long-term solvency problem by highlighting the critical role Social Security plays in the retirement security of many older Americans. Author: Shelton, Alison (PPI)

Key Facts about Older Women and Social Security—In Brief
August 2013—This report highlights three key features of the Social Security program—a progressive benefit formula, lifetime benefits, and inflation-adjusted benefits—that are particularly helpful to women. Author: Shelton, Alison (PPI)
Social Security: A Key Retirement Resource for Women—Fact Sheet  
August 2013—This report describes how women benefit from the Social Security program and illustrates the importance of the program to women’s retirement security. Author: Shelton, Alison (PPI)

Income and Poverty of Older Americans 2011—Fact Sheet  
September 2013—This fact sheet looks at income and poverty rates among the aged 65-plus population. It includes differences by race and ethnicity and other factors. Author: Wu, Ke Bin (PPI)

Social Security’s Impact on the National Economy 2012—Research Report  
September 2013—This research report examines the economic impact on each state and the national economy. The report analyzes Social Security’s effects on state and national employment, output, and labor income. Authors: Koenig, Gary (PPI); Myles, Al (Mississippi State University)

Employment Situation November 2013: Looking up at Last—Fact Sheet  
December 2013—Nonfarm payroll employment rose by an estimated 203,000 in November, up from an estimated 200,000 for October. Nonfarm employment in November was still nearly 1.3 million below what it was at the start of the Great Recession in December 2007. Author: Rix, Sara (PPI)

Sources of Income for Older Americans—Fact Sheet  
December 2013—This updated fact sheet identifies the important sources of personal income for those aged 65 and older. In addition to looking at sources in 2012, it also identifies important trends over time. Author: Wu, Ke Bin (PPI)

Health Care

After the Supreme Court Decision: The Implications of Expanding Medicaid for Uninsured Low-Income Midlife Adults—Insight on the Issues and In Brief  
February 2013—The Affordable Care Act required states to expand their Medicaid programs to cover more low-income people, including midlife adults. However, a recent U.S. Supreme Court decision, while upholding the rest of the health reform law, effectively turned the mandate into a state option. This report examines the Court’s decision and how uninsured midlife adults in states that take up this option can benefit. Author: Flowers, Lynda (PPI)

Recent Medicare Initiatives to Improve Care Coordination and Transitional Care for Chronic Conditions—Fact Sheet  
March 2013—This fact sheet offers updated information on Medicare demonstration projects and initiatives related to chronic care coordination and transitional care for beneficiaries and caregivers. Author: Lind, Keith (PPI)
Rx Price Watch Case Study: Efforts to Reduce the Impact of Generic Competition for Lipitor—*Insight on the Issues*
June 2013—This paper examines the events surrounding Lipitor’s recent patent expiration, including numerous techniques used to delay or thwart generic competition. It also analyzes price increases that took place pre- and post-patent expiration. Author: Purvis, Leigh (PPI)

Is Medicare a Cadillac Health Plan?—*Fact Sheet*
June 2013—This paper discusses the actuarial value of the Medicare program, how it compares to other health insurance plans, and whether it meets the standard to be called a “Cadillac” health insurance plan. Author: Walker, Lina (PPI)

Use of Clinical Preventive Services and Prevalence of Health Risk Factors among Adults 50–64—*Research Report*
August 2013—This paper examines differences in the utilization of highly recommended preventive services among adults aged 50 to 64 at the national state level, with a focus on socioeconomic factors and health care access. Author: Multack, Megan (PPI)

The Importance of Social Security and Medicare: Individual State Profiles—*51 Fact Sheets*
August 2013—These fact sheets provide state data on the number of seniors who count on Social Security for much of their retirement income; the percentage of middle-income seniors kept out of poverty by Social Security; the number of Medicare beneficiaries by state; and the role of Social Security and Medicare in state economies. Authors: Koenig, Gary; Walker, Lina (PPI)

Medicare: A Brief Overview (2013 Update)—*Fact Sheet*
October 2013—This brief overview summarizes coverage and cost sharing in Medicare, characteristics of the Medicare population, and program financing. Author: Multack, Megan (PPI)

Rapid Growth in Medicare Hospital Observation Services: What’s Going On?—*Research Report and In Brief*
November 2013—This paper provides an analysis of the financial impact of using hospital observation services instead of inpatient admission for Medicare beneficiaries, especially those who are discharged to a skilled nursing facility. Authors: Zhao, Lan; Schur, Claudia; Kowlessar, Niranjana (Center for Health Research Policy, Social and Scientific Systems); Lind, Keith (PPI)

After the ACA: Cost Barriers to the Receipt of Colonoscopy Screening Among Medicare Beneficiaries Persist—*Insight on the Issues*
December 2013—This report explores potential barriers to receipt of colorectal cancer screening that persist after the ACA eliminated cost sharing for the screening. Authors: Flowers, Lynda; Noel-Miller, Claire (PPI)

Health Insurance Coverage for 50–64-Year-Olds—*Insight on the Issues*
December 2013—This publication provides an updated picture of the sources of health coverage. Author: Smolka, Gerry (PPI)
Medicare Out-of-Pocket Spending for Health Care—*Insight on the Issues*
December 2013—This paper provides detail about and discussion of health-related costs not covered by traditional Medicare. Author: Noel-Miller, Claire (PPI)

Medicare Part D Open Enrollment for 2014: Popular Plans Continue to Evolve—*Fact Sheet*
December 2013—This paper provides an overview of the Medicare Part D Program as well as the characteristics of popular prescription drug plans for 2014. It finds premiums increasing for many popular plans. Author: Purvis, Leigh (PPI)

Ready, Set, Go! How Do States Ensure That Health Plans Are Ready to Provide Long-Term Services and Supports to Vulnerable Populations?—*Spotlight*
December 2013—Care coordination and provider network adequacy are essential for delivery of safe, high-quality managed long-term services and supports (LTSS). Through interviews with Medicaid officials in five states—Arizona, Minnesota, Tennessee, Texas, and Wisconsin—this report identifies how these states ensure that managed care organizations are ready to provide these two components of managed LTSS before they begin enrolling vulnerable consumers. Author: Flowers, Lynda (PPI)

LONG-TERM SERVICES AND SUPPORTS

State HCBS Cost-Effectiveness Studies—*Spotlight and In Brief*
March 2013—This paper reviews recent state studies looking at the cost-effectiveness of providing home- and community-based services. The studies consistently provide evidence of cost containment and a slower rate of spending growth as states have expanded HCBS. Authors: Fox-Grage, Wendy (PPI); Walls, Jenna (Health Management Associates)

Two-Thirds of States Integrating Medicare and Medicaid Services for Dual Eligibles—*Insight on the Issues*
April 2013—This research finds that two-thirds of states either have or will launch new initiatives to better coordinate care for people who are dually eligible for Medicare and Medicaid services, the so-called “duals,” over the next 2 years. To contain the growth of costs and improve care, many of them are moving to risk-based managed long-term services and supports models. Authors: Fox-Grage, Wendy; Ujvari, Kathleen (PPI)

Medicaid: A Program of Last Resort for People Who Need Long-Term Services and Supports—*Insight on the Issues*
May 2013—Designed as a program for people with low incomes and few assets, Medicaid is a safety net of last resort for those whose needs exceed what unpaid family and friends can provide, and who exhaust their resources paying out of pocket for care. Authors: Fox-Grage, Wendy; Redfoot, Don (PPI)

At the Crossroads: Providing High-Demand LTSS in a Time of Fiscal Constraint—*Research Report and In Brief*
July 2013—Tight fiscal budgets and increasing demand for publicly funded long-term services and supports (LTSS) are putting pressure on states to transform their systems of care for older people and adults with disabilities. Many states are beginning to implement Affordable Care
Act LTSS options that increase access to Medicaid home- and community-based services, but non-Medicaid aging and disability funding has either decreased or remained flat in most states. Authors: Scully, Diana; Cho, Eunhee (Grace); Hall, John Michael; Walter, Kelsey (NASUAD); Walls, Jenna (HMA); Fox-Grage, Wendy; and Ujvari, Kathleen (PPI)

**Consumer Choices and Continuity of Care in Managed LTSS: Emerging Practices and Lessons—Research Report and In Brief**
August 2013—Increasing numbers of states are transitioning their Medicaid long-term services and supports (LTSS) systems from fee-for-service models to managed care models, raising concerns among stakeholders that services will be disrupted and consumer choices diminished. This report looks at recent managed care transitions in Kansas, New York, and Wisconsin, and found that little changed for consumers during the transition period and services were not disrupted. The findings are limited to the transition period studied. Longer-range impact on consumers of managed LTSS is unknown and should be monitored closely. Authors: Saucier, Paul; Burwell, Brian (Truven Health Analytics); Halperin, Alissa (Halperin Butera Consulting)

**Livable Communities**

**Work-Related Travel in an Era of Extended Employment—Insight on the Issues and In Brief**
March 2013—This paper looks at how the trend toward extended employment among older Americans affects travel/commuting patterns—and the implications of these changes for policy. Author: Lynott, Jana (PPI)

**Weaving It Together: A Tapestry of Transportation Funding for Older Adults—Research Report and In Brief**
April 2013—This paper highlights the major sources of federal support that states can tap to fund non-emergency medical transportation (NEMT) for these populations. It also highlights localities that have successfully combined these limited resources with state, local, and private sources to provide transportation to older adults with physical disabilities in the community. Authors: Lynott, Jana; Fox-Grage, Wendy; Guzman, Shannon (PPI)

**Video featuring Washington State’s Rural Intercity Bus Network and Rural Transit-Oriented Development—Video**
December 2013—This video shows how rural transit-oriented development (TOD) can support the mobility and service needs of older residents, connecting them to both local and regional services, extended family, and shopping opportunities via an integrated transportation network comprising local and intercity bus and rail public transportation. Author: Lynott, Jana (PPI)

**Consumer Protection**

**An Analysis of 2011 Utility Expenditures by Older Consumers—Web Publication**
January 2013—This publication 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 (PPI)
A Connection for the Ages: Enabling Broadband Benefits for Older Adults—*Insight on the Issues and In Brief*
March 2013—This paper identifies the benefits of high-quality broadband internet access for older Americans and examines essential characteristics, such as affordability and quality, to achieve the goal of universal availability and adoption of world-class broadband networks. Author: Baker, Chris (PPI)

2012–2013 Winter Heating Costs for Older and Low-Income Households—*Web Publication*
March 2013—This report analyzes data from the 2009 Residential Energy Consumption Surveys and the March 2013 Short-Term Energy Outlook. It examines heating-related energy consumption and expenditures among consumers aged 65 and older based on income, heating fuel used, and geographic location. Authors: Jackson, Ann; Walters, Neal (PPI)

Summer Cooling Burdens Many Older Consumers—*Web Publication*
Many older consumers will receive high cooling bills throughout the 2013 summer cooling season, with consumers in the South affected most. Authors: Jackson, Ann; Walters, Neal (PPI)

A Platform for Home Health and Aging in Place: The Increasing Potential of High-Speed Internet Connectivity—*Insight on the Issues*
July 2013—Services delivered by high-speed Internet connection can help older adults live independently in their own homes. This report recommends policy makers make high-speed Internet access much more widely available. Author: Baker, Chris (PPI)

Choosing Home for Someone Else: Guardian Decisions on Long-Term Services and Supports—*Research Report and In Brief*
October 2013—This paper looks at how professional guardians decide where incapacitated adults should live and offers recommendations for improving the process. Authors: Karp, Naomi (Consumer Financial Protection Bureau’s Office for Older Americans); Wood, Erica (American Bar Association Commission on Law and Aging)

2013–2014 Winter Heating Costs for Older and Low-Income Households—*Web Publication*
November 2013—Heating costs remain higher for households heating with fuel oil than those heating with natural gas or electricity, but for the first time in years natural gas prices are rising as well. Authors: Jackson, Ann; Walters, Neal (PPI)

Utility Expenditures Hit Older Americans Hardest—*Web Publication*
Latest data show utility expenditures are a higher percentage of average annual expenditures for older consumers. Author: Walters, Neal (PPI)

**Caregiving**

Keeping up with the Times: Supporting Family Caregivers with Family Leave Policies—*Fact Sheet*
June 2013—This report addresses ways to support the health and caregiving needs of today’s workers with elder-care responsibilities: unpaid family and medical leave, paid family and medical leave, and paid sick days. Author: Feinberg, Lynn (PPI)
The Aging of the Baby Boom and the Growing Care Gap: A National and State-by-State Look at the Future Declines in the Availability of Family Caregivers—Insight on the Issues and In Brief

August 2013—This paper uses a “caregiver support ratio” to document the declining availability of family caregivers to provide LTSS between 1990 and 2050. It defines a “caregiver support ratio” as the number of potential caregivers aged 45 to 64 for each person ages 80 and older. It documents the dramatic widening of the care gap nationally and in all 50 states and the District of Columbia as baby boomers age into their 80s, beginning in 2026. The report also highlights trends that may influence the future supply of family support for the frail older population.

Authors: Redfoot, Don; Feinberg, Lynn; Houser, Ari (PPI)

Employed Family Caregivers Providing Complex Chronic Care—Insight on the Issues

November 2013—This paper takes a close look at challenges facing family caregivers who perform medical/nursing tasks for family members while employed. This paper is based on further analysis of the groundbreaking research reported in “Home Alone: Family Caregivers Providing Complex Chronic Care.” Authors: Reinhard, Susan (PPI); Levine, Carol; Samis, Sarah (United Hospital Fund)

Listening to Family Caregivers: The Need to Include Family Caregiver Assessment in Medicaid Home- and Community-Based Service Waiver Programs—Research Report and In Brief

December 2013—Family caregiver assessment is critical for effective delivery of home- and community-based services (HCBS), but the concept is not well understood in policy or practice.

Authors: Kelly, Kathleen; Wolfe, Nicole (National Center on Caregiving, Family Caregiver Alliance); Gibson, Mary Jo (Consultant on Long-Term Services and Supports); Feinberg, Lynn (PPI)
EVENTS

SOLUTIONS FORUMS


This Solutions Forum addressed: (1) how the federal government measures changes in the cost of living and (2) how proposed changes to this measure will affect a range of government programs that serve tens of millions of Americans. Changes include adopting either the Chained CPI, which would reduce annual cost-of-living adjustments (COLAs), or the CPI-E, designed to reflect the purchases of older Americans. Gary Koenig from AARP’s Public Policy Institute moderated and organized the event. The forum included an overview of COLAs by Stephen Goss, chief actuary of the Social Security Administration. Presentations focused on how the Chained CPI or the CPI-E would affect Social Security beneficiaries over time and how it would affect veterans, Americans with disabilities, and people with very low incomes. The forum included speakers from think tanks (Dean Baker, Center for Economic Policy and Research, and Sita Slavov, American Enterprise Institute) and representatives for Americans with disabilities (Rebecca Vallas, Community Legal Services) and veterans (Tom Tarantino, Iraq and Afghanistan Veterans of America). The event was attended by about 100 Hill staff members, policy makers, reporters, and other interested parties and was covered by C-SPAN.

How to Improve Care and Lower Costs in Medicare: Promising Approaches—May 7, 2013

This Solutions Forum discussed promising approaches to improving care and reducing costs in Medicare. SVP Susan Reinhard co-moderated the panel with NASI President Larry Atkins, and Health Team Director Lina Walker organized the event. The panel included CEOs from two integrated health systems and the Alliance of Community Health Plans, as well as representatives from consumer and purchaser groups that focus on patient safety, hospital performance, and improving public reporting of quality measures. The event was attended by 100 Hill staff members and other policy experts.

Rethinking Retirement: Moving ahead without Leaving Anyone Behind—July 26, 2013

AARP and the U.S. Chamber of Commerce co-hosted a conference on improving retirement security that focused on ways to increase the number of Americans who save and to encourage greater retirement savings. The conference featured an overview speaker followed by three panels. The first panel explored how to address coverage challenges unique to certain demographic groups including women, African Americans, Hispanic Americans and nontraditional workers. The next panel discussed specific ways to expand coverage using new plan designs, offering new incentives and through broader use of automatic enrollment and automatic escalation. The final panel engaged employers, small business owners, and consumer advocates in a discussion about how to improve access to retirement coverage. More than 125 policy makers, experts, and stakeholders attended. C-SPAN covered the event.
Retirement Savings in Australia, Asia and Beyond: What Are the Lessons for the U.S.?—September 17, 2013

The AARP Public Policy Institute and the Retirement Security Project at Brookings co-hosted a conference on retirement savings and pension reform in Australia, Asia, and Europe and how experiences in those nations can shape the U.S. policy debate. The main speakers included former Australian Minister of Superannuation Nick Sherry and Josef Pilger, the Asian retirement policy head at Ernst & Young. A panel including Steve Utkus of Vanguard’s Center for Retirement Research, David Harris of Tor Financial Consulting in the United Kingdom, and Ben Harris of the Urban Institute commented on what American policy makers can learn from those countries. More than 120 experts and stakeholders attended.

Modernizing Medicaid: Putting Home- and Community-Based Services on Equal Footing with Nursing Homes—October 30, 2013

This forum explored modernizing Medicaid to enable people who need long-term services and supports (LTSS) to live where they choose, including their own homes and communities. The discussion came at a time of growing bipartisan consensus that Medicaid’s legislative mandate to deliver LTSS in nursing homes needs to be revised. In addition to restricting choice, the current half-century-old mandate makes it difficult to meet a growing demand for LTSS services in a cost-effective way. The recent federal Commission on Long-Term Care called for building a system that promotes “services for persons with functional limitations in the least restrictive setting appropriate to their needs.” A major step toward accomplishing this would be a legislative fix so that Medicaid no longer pays for nursing homes as a mandatory service and home- and community-based services (HCBS) as an optional service. Held in the Senate Caucus Room, this event drew more than 150 experts, Hill staff, and stakeholders.

Hospital Observation Status: Am I in the Hospital or Not? Why Hospitals Are “Observing”—Not Admitting—Patients—December 6, 2013

The Public Policy Institute and the Alliance for Health Reform co-hosted a Solutions Forum on hospital observation services and their impact on Medicare beneficiaries. A panel of four experts discussed the rapid rise in the use of observation status, a designation used to monitor patients during periods of medical uncertainty that has attracted the attention of media, courts, and policy makers. The forum highlighted a recent PPI Research Report on the topic, “Rapid Growth in Medicare Hospital Observation Services: What’s Going On?” More than 150 congressional staff, federal agency officials, stakeholders, and media attended the event, which was broadcast live on C-SPAN.

Innovation Roundtables

Consumer Choice and Continuity of Care in Managed Long-Term Services and Supports: Emerging Practices and Lessons—April 2, 2013

The rapid expansion of managed long-term services and supports (MLTSS) raises important consumer protection issues for older persons and persons with physical disabilities. This meeting examined key policy and operational aspects of two important issues: consumer choice and
continuity of care. The discussion highlighted best practices and lessons that may be useful as states develop new and expanded MLTSS programs. The meeting helped inform a PPI publication by Truven Health Analytics on the same topic. Attendees included high-level officials from the U.S. Centers for Medicare and Medicaid Services, state officials, AARP state offices, and colleagues from the national AARP office.

**Family Caregivers Providing Complex Chronic Care—June 4, 2013**

The purpose of this roundtable was to gain a deeper understanding of the complex medical/nursing tasks family caregivers are providing with very little training and what more is needed to support them. Experts took an analytical look at the absence of family caregivers in current Center for Medicare and Medicaid Innovation demonstration programs and focused on solutions to incorporate caregivers in the future.

**Disability and Work—August 12, 2013**

The Public Policy Institute convened a roundtable to explore how the 2014 LTSS Scorecard could better capture measures that are important to working-age adults with physical disabilities. Participants discussed opportunities and barriers for people with disabilities seeking to obtain and retain employment, and the need for better sources of data. Participants included federal and state officials, as well as representatives from advocacy organizations. The meeting highlighted innovative state approaches and possible interventions in both public and private sectors.

**Age-Friendly Banking—September 30, 2013**

Age-friendly banking is an umbrella term for how to improve the banking system for an aging population. People over 50 tend to be regular banking customers but also face health challenges related to their age that can affect their relationships with banks and other financial institutions. The roundtable was attended by banks of various sizes (small community banks, regional banks, and large national banks), regulators, and consumer interest groups. Roundtable participants heard presentations about efforts by banks to be age friendly and the cost of financial exploitation. Topics of discussion included age-friendly products and services, facilitating financial caregiving, financial exploitation, and the need for more research.

**Raising the Visibility: Identifying the Needs of Multicultural Family Caregivers—October 1, 2013**

Experts from academia, community-based organizations, the federal government, and AARP staff convened to explore the challenges, needs, and experiences of multicultural (African American, Asian, and Hispanic/Latino) family caregivers. The aim of this meeting was to begin to identify policy concerns, research needs, and best practices that will effectively address the issues of isolation, economic and retirement security, and self-care of caregivers within these communities. An immediate next step from this meeting was the development of a thorough literature review on existing research in the area of multicultural family caregiving. The results of this review, along with the collective themes that surfaced during the roundtable, will be used to inform a larger “State of the Science” initiative on multicultural caregiving planned for 2014.
Tapping the Potential of Nurses in Health Care Delivery—October 16, 2013

The Center to Champion Nursing in America (CCNA) and the Global Social Enterprise Initiative at Georgetown University’s McDonough School of Business hosted a discussion by high-level business and health care leaders to explore ways the Future of Nursing: Campaign for Action can approach conversations about scope of practice. CCNA coordinates the Campaign for Action. The roundtable was followed by a meeting of the Campaign’s Strategic Advisory Committee, which heard updates about the Campaign’s progress and activities.

Physician Payment Reform—October 31, 2013

This meeting brought together experts with varying views and perspectives to discuss how Medicare’s system for paying physicians and other practitioners should be improved. Participants discussed lessons from delivery and payment system reforms, where Medicare’s payment system should be headed in the long term, and next steps to getting there.

Out of Work at 50+: Crafting a Workforce Development System That Better Meets the Needs of Older Jobseekers and Workers—November 7, 2013

This roundtable convened employment and workforce development experts to examine: (1) how the workforce development system is meeting and could better meet the needs of the older long-term unemployed, and (2) how the system could help keep older jobseekers from finding themselves among the long-term unemployed in the first place. Among the institutions and agencies represented were think tanks, the National Association of State Workforce Agencies, the Center for Law and Social Policy, the AFL-CIO, and Senior Service America.

CCNA Conferences and Meetings

Campaign for Action: The Road Ahead—February 28–March 1, 2013

This summit gathered top nursing leaders, state policy makers, consumer advocates, and business leaders from the Campaign’s 50 state-based Action Coalitions (ACs). The summit is designed for AC members working at the state level to transform health care through nursing. Attendees connected with colleagues from across the country, engaged in innovative thinking, sharing, and interactive problem solving.

Champion Nursing Council Meeting—July 8, 2013

The Champion Nursing Council convened an in-depth discussion on issues critical to nursing’s role in the future of health care in America.

Education Learning Collaborative (Chicago, IL)— September 16–17, 2013

The CCNA education learning collaborative reconvened for a 2-day intensive meeting to further outline strategies to promote nursing academic progression. The meeting also addressed strategies to increase diverse nursing student enrollment and retention.
Leadership Learning Collaborative—November 18–19, 2013

CCNA officially launched a series of in-person meetings for the leadership learning collaborative. Participants included ACs that are the most advanced in promoting nurses into leadership positions at the state and national level. Participants received 2 days of intensive technical assistance to help them further develop strategies and tactics.

Diversity Steering Committee (Princeton, NJ)—November 21, 2013

The Campaign’s diversity steering committee convened at the Robert Wood Johnson Foundation to evaluate and approve the AC’s diversity actions plans.

Leadership Learning Collaborative—December 9–10, 2013

Second meeting of the Leadership Learning Collaborative.

CCNA Webinars

It’s Possible: Forecasting and Moving Your Organization to an 80% BSN Prepared Workforce—January 22, 2013

Educational preparation of RNs has moved from debate to implementation. Moving the workforce from its current state to the desired future state of 80% BSN, as suggested by the Institute of Medicine, requires changing hiring policies and educational expectations. In this presentation, nurses learned how to create plans tailored to specific organizational needs through the use of a predictive model. By inputting RN turnover, educational levels of new hires, and the preparation of the current workforce as elements in the tool, nurses can forecast the impact of policy changes and new programs.

Campaign for Action: The Road Ahead: An Orientation to the National Summit—February 7, 2013

In the past 2 years the Future of Nursing: Campaign for Action has progressed rapidly with the expansion of 50 state ACs and efforts to implement the Institute of Medicine initiatives that will transform health care through nursing. From February 28 to March 1, 2013, ACs members representing all 50 states gathered in Washington, DC, for a summit to further develop strategies to achieve success.

Future of Nursing: Campaign for Action State Implementation Program Applicant Information Webinar—April 18, 2013

The Robert Wood Johnson Foundation released a Request for Proposals for the Future of Nursing State Implementation Program (SIP), which will provide up to 10 grants of up to $150,000 each over 2 years to Campaign for Action State Coalitions to implement up to two priority recommendations from the Institute of Medicine report “The Future of Nursing: Leading Change, Advancing Health.” Grantees are required to raise matching funds as a condition of the grant. On this webinar participants learned about details of SIP, such as requirements, eligibility, selection criteria, how to apply, and timeline.
Plan to Get Funding: Creating an AC Development Plan—May 6, 2013

CCNA consultant and former CA Action Coalition co-lead, Casey R. Shillam, PhD, RN, facilitated a discussion on opportunities for seeking funding. The discussion centered on understanding principals of fundraising and establishing a team within each AC that focuses on development.

An Update on NCSBN’s Campaign for Consensus, Legislation and Maps—June 3, 2013

Representatives from the National Council of State Boards of Nursing (NCSBN) took a look at the APRN Campaign for Consensus.

Advocacy Evaluation—June 13, 2013

The TCC Group, a leader in developing strategies and programs that enhance the efficiency and effectiveness of nonprofit organizations and foundations, presented on what advocacy evaluation is and how it is different from traditional evaluation. The webinar explored how groups engaging in advocacy activities can benefit from advocacy evaluation (such as informing strategy) and shared tools and resources on how ACs could incorporate this into their work.

What Makes an Effective Coalition? Evidence-Based Indicators of Success—June 26, 2013

Drawing from TCC Group’s research and experience, this webinar presented key elements of effective coalitions (e.g., what does effective leadership look like, how do you manage and structure the coalition), tailored to the goals and needs of ACs.

Promising Practices and Resources to Develop and Bolster a Diversity Action Plan—July 10, 2013

State AC leaders shared strategies for increasing minority student enrollment in baccalaureate and doctoral programs. The Robert Wood Johnson Foundation’s diversity expert, Jacinta Gauda, shared the “Building a Better Diversity Recruitment Pipeline through Strategic Alliances” toolkit to help initiate and bolster AC diversity efforts.

Update on Reporting AC Progress—June 22, 2013

ACs are a driving force of the Campaign for Action. To best feature the successes being made to transform health care through nursing, the Campaign is redesigning the way ACs will communicate their progress. Discussion on this webinar focused on this new reporting process. Participants learned about the Campaign’s 2013 national priorities and how they relate to the work ACs are already doing.

Patient Advocates: A Powerful Nurse Practitioner Resource—August 8, 2013

This webinar, offered by the American Nurse Practitioner Foundation, featured Regina Holliday, caregiver, patient advocate, and artist. Holliday delivers a powerful message about patient rights, the health care system, and needed change. Susan Hassmiller, PhD, RN, FAAN, addressed nurse and faculty shortages in an effort to create a higher quality of patient care in the United States. Dr. Hassmiller shared how focusing on patient-centered messaging can have an impact on changing legislation by addressing scope of practice, prescriptive authority, and reimbursement.
Social Media 101: An Intro for Action Coalitions—August 15, 2013

Campaign for Action communications specialists gave an overview of the evolving social media landscape and tips for how ACs can use social media to engage their audiences. This webinar featured live demonstrations of Facebook and Twitter and highlighted several examples of how ACs, the Campaign, and the Robert Wood Johnson Foundation are using social media to increase their reach and impact.

Resources and Promising Practices to Develop and Bolster a Diversity Action Plan—September 27, 2013

AARP, the Robert Wood Johnson Foundation, and the Campaign for Action are committed to increasing diversity of the nursing workforce, faculty, and leadership. On this webinar, ACs learned about criteria, informed by the Campaign’s Diversity Steering Committee, and promising practices that will help create or bolster their diversity action plans. Participants also learned examples of how ACs are embedding diversity into strategic plans and heard about resources that will become available.

Legal Matters: Making Grant Dollars Go Farther—October 22, 2013

ACs face limits on their lobbying, but too often nonprofits fail to take full advantage of their grant dollars because they misunderstand what the lobbying prohibition really covers. To maximize advocacy, ACs need to know what is—and, more important, what isn’t—lobbying. Armed with that knowledge, ACs can plan communications strategically to increase their ability to achieve policy goals.

State Implementation Program: Grantee Orientation—November 11, 2013

Orientation included all State Implementation Program grantees, as well as staff from the Robert Wood Johnson Foundation and AARP Center to Champion Nursing in America.


Campaign for Action communications specialists discussed the benefits of using visual communications (e.g., photos, graphics, and video) to tell a story. The webinar provided ACs with ideas, tips, and tools for showcasing their work in powerful ways. Kathy McKeever from the New Jersey AC also presented her group’s experience with creating and promoting visual content.

Educating Multicultural Communities on the Patient Protection and Affordable Care Act (ACA): A Leadership Model for Nurses—December 13, 2013

The webinar featured AARP Arizona’s David Parra and a national nursing leader based in Arizona, Dr. Adriana Perez. On the webinar, they described the train-the-trainer program they designed for nurses to educate the public about the ACA. Their program was directed toward racially and ethnically diverse nurses who informed multicultural audiences about the ACA.
STRATEGIC INITIATIVES

PPI’s Strategic Initiatives group develops and manages programs and services that span AARP’s key focus areas, including caregiving, long-term services and supports, and health care. Highlights of 2013 program accomplishments are detailed below.

CENTER TO CHAMPION NURSING IN AMERICA (CCNA)

Overview

The Center to Champion Nursing in America stepped up its volume of work and outreach in 2013 to promote public and private policy solutions in nursing and health care delivery.

In October, CCNA embarked on its fourth year coordinating the activities of the Future of Nursing: Campaign for Action, an initiative of AARP and the Robert Wood Johnson Foundation. The Campaign is a national grassroots and grasstops initiative to ensure everyone in America can live a healthier life, supported by a system in which nurses are essential partners in providing care and promoting health.

Stakeholder Engagement

In 2013, CCNA managed a network of 51 Campaign for Action state-based ACs. To broaden its reach, CCNA involved 34 AARP state offices in a growing network of organizations that see the value of the Campaign and its goals.

Nationally, CCNA conducted stakeholder engagement efforts with more than 80 national health care, business, consumer, and education groups that worked with CCNA to support Campaign for Action goals. In addition, CCNA staff gave more than 47 presentations to stakeholder organizations around the nation.

CCNA continued to work with its Champion Nursing Coalition—55 leading business, health care, consumer, and insurer groups supporting the Campaign’s efforts. This year, the Coalition added two new members, MinuteClinic (a Division of CVS Caremark) and Centering Healthcare Institute. Champion Nursing Coalition members have advocated for AARP-supported legislation, including the Home Health Care Planning Improvement Act of 2013 and several key state bills to expand consumer access and choice. Other Coalition members have taken important steps to advance nursing leadership by placing nurses on their boards of directors. Additionally, this year CCNA launched the “Nurse Champion” series on our website to highlight select Coalition members for their work to support nursing.

The Champion Nursing Council, developed by CCNA and comprising representatives of the country’s leading nursing organizations, was also active throughout the year. In July, CCNA convened the group in a session with the senior advisor to the administrator at the Centers for Medicare and Medicaid Services (CMS) to discuss nurses’ role in informing the public about the ACA.

CCNA continued to work with the Future of Nursing: Campaign for Action Diversity Steering Committee. This committee brings together seven of the nation’s largest multicultural nursing
organizations to guide the Campaign’s diversity efforts. The group convened throughout the year and developed criteria for ACs to create or bolster their diversity action plans.

CCNA also continued to support the Campaign’s Strategic Advisory Committee—12 high-profile national leaders from business, health care, and academia. Members participated in an in-person meeting to provide the Campaign with valuable insight and guidance on the Campaign’s role in health care transformation. They also participated in the off-the-record Innovations Roundtable “Tapping the Potential of Nurses in Health Care Delivery.” Members were also instrumental in garnering high-profile coverage of nursing issues, including an op-ed written by Sheila Burke and Bill Novelli for Politico: “Advanced Nurses Lower Cost, Improve Care.”

In partnership with Georgetown University’s McDonough School of Business Global Social Enterprise Initiative, CCNA hosted an Innovations Roundtable on the topic of “Tapping the Potential of Nurses in Health Care Delivery.” This event featured thought leaders from health care delivery and the business community, who helped the Campaign develop a plan to involve business leaders on the issue of removing barriers to practice and care.

CCNA and AARP state advocacy staff increased collaboration in 2013. In Arizona, AARP and the Phoenix Chapter of the National Association of Hispanic Nurses (NAHN) designed and implemented a train-the-trainer program so that Hispanic staff nurses could inform the Hispanic and broader communities in the state on obtaining health coverage. AARP state advocacy group provided funding for these NAHN community outreach efforts in Arizona. As a result of this model and other efforts by AARP California, several other AARP state offices are adding to their ACA education and outreach efforts by engaging with state nursing organizations such as NAHN, the National Black Nurses Association, and others.

**Technical Assistance Summary**

At the Campaign for Action’s 2013 summit in Washington, DC, 51 state-based ACs benefited from intense CCNA technical assistance. At this event, more than 250 leaders from many areas—nursing, medicine, business, health systems, philanthropy, and academia—came together to share innovative ideas and develop plans for transforming health care and improving health with a focus on the changing role of nurses in a patient-focused health care delivery system.

In 2013, CCNA planned and implemented three additional in-person meetings. In September, CCNA provided select AC members of the Learning Collaborative on Advancing Nursing Education Transformation with targeted technical assistance and shared learnings on academic progression. In November and December, CCNA invited AC members focused on advancing nursing leadership initiatives to meet and collaborate on developing action plans to advance nurses as leaders on hospital boards.

CCNA also provided expertise and technical assistance through webinars, videos, and teleconferences. CCNA produced 16 webinars on nursing/campaign-related issues; created a seven-part video series on education progress; and hosted nine teleconference discussions on issues related to removing barriers to APRN practice and care and another seven teleconferences on nursing leadership.
CCNA is the National Program Office administering the Robert Wood Johnson Foundation State Implementation Program grant that now funds 30 state ACs. These coalitions will implement priority recommendations outlined in the Institute of Medicine report “The Future of Nursing: Leading Change, Advancing Health.”

Public Policy

Several states have modernized their scope of practice laws that pertain to advanced practice registered nurses. Nevada passed a law that allows nurse practitioners to practice to the top of their education and training without physician oversight. In Utah, Medicaid now recognizes nurse practitioners as primary care providers and will reimburse them as such. Although a similar bill in California did not pass this year, AARP California and AARP’s National Office put extensive resources into supporting the bill.

Impact

Overall, in 2013, CCNA built on an established structure to implement positive change in health care. State and national coalitions, coupled with CCNA’s activities as an information clearinghouse, provided a framework for strengthening the nursing workforce and commitment to achieving the recommendations in the Institute of Medicine report. CCNA has increased the visibility of nursing issues and the diversity of stakeholders involved in addressing them. The technical assistance provided by CCNA has helped nursing leaders in states become familiar with best practices and innovations throughout the country.

ReACT

ReACT (Respect A Caregiver’s Time) was launched in 2010 as an employer-focused coalition dedicated to addressing the challenges faced by working caregivers as well as reducing the impact on the companies that employ them. This coalition, funded by Pfizer and the members of the coalition, is dedicated to increasing awareness, understanding, and action around issues faced by working caregivers. These members include small, mid-size, and large companies as well as other nonprofit organizations. AARP is currently a member of ReACT.

Each year, this coalition funds a major project to support its efforts to assist working caregivers. In 2012, ReACT published a study conducted by the National Alliance for Caregiving that stresses the importance of providing resources to employers to help them assist their employees who are also caregivers. To support this effort, Pfizer provided a grant to the Public Policy Institute to develop a new online resource guide for employers that can be found at http://www.aarp.org/react. In 2013, the Public Policy Institute created and launched an interactive website that highlights key information for assisting employed caregivers, including:

- Stories and video summaries of employers and their support of the working caregiver.
- Thought pieces from employers (small summaries on different company perspectives of how they support working caregivers).
● Resources for both the employer and employees dealing with family caregiving issues.

● The latest research around specific topics of interest to employers (workplace flexibility, costs and cost effectiveness, health, impact, and benefits).

● Highlights of Best Practices (18 organizational case studies).

● Showcasing employer success stories (monthly highlight of a company’s efforts in supporting their working caregivers).

The launch event at the U.S. Chamber of Commerce on November 20, 2013, reached an estimated 70,000 people across the United States and Canada. Social media about the website reached hundreds of thousands more, as did TV coverage of ReACT members ringing the opening bell of the New York Stock Exchange.

**State Long-Term Services and Supports Scorecard**

PPI, along with the Commonwealth Fund and the SCAN Foundation, is a cosponsor of the LTSS Scorecard Project, which measures state-level performance delivering long-term services and supports systems to older adults and people with disabilities. The Scorecard provides state leaders with critical information needed to evaluate and improve their performance.

In 2013, PPI continued to build momentum towards the 2014 release of the second edition of the LTSS Scorecard. Staff organized two meetings of the Scorecard National Advisory panel, which offers guidance on the data used in the Scorecard and articulates a vision of a high-performing LTSS system. Based on the panel’s recommendations, the Scorecard team has developed and finalized the data supporting some 29 indicators of state performance.

During the year the Scorecard was featured in 15 high-level conferences and gatherings, including a discussion during a meeting of the Long-Term Care Commission, as well as a presentation before the National Council of State Legislatures.
SELECTED PRESENTATIONS

ECOnOMIC SECURITY


HEALTH CARE


Lynda Flowers “What Do Dual Eligibles Want from Their Care?” HealthCare Education Associates and Risk Adjustment Initiative and Society for Education, Orlando, FL, September 17, 2013.


Megan Multack, “Research on Use of Preventive Services and Prevalence of Risk Factors,” and demonstrated how to use the interactive tools on the State Preventive Care Rankings Website, Webinar with Communication Directors of AARP State Offices, August 15, 2013.


**CONSUMER PROTECTION ISSUES**


Ryan Wilson, “The Regulation of Senior Certifications and Designations,” Society of Certified Senior Advisors, Orlando, FL, August 8, 2013.


**Livable Communities**


Rodney Harrell, “Consultation on Developing Age-Friendly City Indicators,” the Second International Conference on Age-Friendly Cities, Québec City, QC, Canada, September 8–11, 2013.


Jana Lynott, “Weaving It Together: A Tapestry of Transportation Funding for Older Adults,” National Association of States United for Aging and Disabilities Home and Community Based Services Conference, Crystal City, VA, September 11, 2013.


Rodney Harrell, “Housing and Transportation Challenges and Solutions for an Age-Friendly Hawaii,” Age-Friendly Honolulu Board, Honolulu, HI, December 19, 2013.

Rodney Harrell, “Housing and Transportation Challenges and Solutions for an Age-Friendly Hawaii,” AARP Hawaii, Honolulu, HI, December 20, 2013.

PPI is a sponsor of the National Home- and Community-Based Services Conference, held in Arlington, VA. More than 1,000 federal, state, and local leaders as well as advocates registered for the conference. PPI held a series of sessions at the conference on dual eligibles, caregiver assessment, transportation funding for older adults, and managed long-term services and supports. Wendy Fox-Grage, Lynn Feinberg, Susan Reinhard, Lynda Flowers, Rhonda Richards, and Jana Lynott gave presentations at these sessions and featured our recent and upcoming PPI publications. Most of the PPI LTSS staff attended this professional conference. Janett Gasaway, Barbara Goodwin, and Rick Deutsch were instrumental with our sponsorship and exhibit booth. Wendy Fox-Grage served on the advisory board to the conference. September 9–12, 2013.

**LONG-TERM SERVICES AND SUPPORTS (LTSS)**


Enid Kassner, “Aspects of the LTSS Scorecard and How NY Performed,” AARP NY Volunteers and Staff, Syracuse, NY, April 24, 2014.


Enid Kassner, “NM’s Scorecard Performance,” AARP NM, New Mexico, October 22, 2013.
Enid Kassner, “LTSS 101,” Health and LTSS Committee of the AARP National Policy Council (NPC), Washington, DC, May 1, 2013.


**CAREGIVING**


Lynn Feinberg, “What Is Person- and Family-Centered Care and What Happens When We Fail to Provide It?,” American Society on Aging’s Aging in America Annual Meeting, Chicago, IL, March 15, 2013.


Lynn Feinberg, “Populations in Need of Long-Term Services and Supports (LTSS) and Service Delivery Issues,” testimony before the Federal Commission on Long-Term Care, Washington, DC, July 17, 2013.

Lynn Feinberg, “Policies to Support Family Caregivers,” Institute of Medicine Committee on Transforming End-of-Life Care, Stanford University School of Medicine, Palo Alto, CA, May 29, 2013.


**Future of Nursing**


