



AARP Public Policy Institute

Annual Report 2010

AARP Public Policy Institute

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AARP PUBLIC POLICY INSTITUTE ANNUAL REPORT 2010

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HIGHLIGHTS

The AARP Public Policy Institute (PPI) celebrated its 25th anniversary in 2010 with a heightened focus on:

- Serving on the cutting edge of national thought leadership on issues of primary concern to Americans 50 plus: health care, financial security, and quality of life at home and in the community.
- Developing policy options and providing research and analysis as the factual basis for AARP's advocacy for health reform and for the protection of Social Security.
- Supporting major AARP national social change initiatives, such as the AARP Foundation's Campaign to End Hunger, as well as AARP state efforts to protect and advance the interests of older adults.

PPI's impact can be seen in growing major media coverage of PPI reports on key issues; in the number of stakeholder organizations seeking presentations by PPI staff; and in the range of thought leaders engaged in PPI Solutions Forums and Innovation Roundtables.

MEDIA COVERAGE

Media coverage of PPI in 2010 included more than 125 articles about PPI studies or citations of PPI experts on several key issues. Coverage this year was highly focused:

- More than 50 media outlets provided substantive coverage of findings on increasing retail costs of name brand drugs, published in the inaugural edition of Rx Price Watch, a new PPI publication.
- National newspapers and business publications extensively cited results from PPI's monthly reports on persistent high unemployment among older adults.
- PPI reports on Social Security and trends in Long-Term Care Services and Supports also received broad coverage.

PPI reports, Solutions Forums, and experts were cited in a broad range of media, including:

- *US News*
- *Wall Street Journal*
- *New York Times*
- AP
- *LA Times*
- *Congressional Quarterly*
- *USA Today*
- Huffington Post
- NPR
- *Washington Post*
- ABC News
- Forbes
- Fox Business News
- Fox News
- *Boston Globe*
- *Chicago Tribune*
- *Health Affairs*
- *Modern Healthcare*

PUBLICATIONS

This year PPI staff published 70 publications: 11 *Research* or *Special Reports*, 12 *Insight on the Issues*, 3 *In Briefs*, and 44 *Fact Sheets*. The following PPI reports had a strong impact in 2010:

- Monthly reports on the unemployment situation for older Americans received widespread national media coverage.
- PPI staff produced a series of 13 *Fact Sheets* on the impact and implementation of health care reform legislation that served as a major tool for AARP education and advocacy among thought leaders nationwide.
- An *Insight on the Issues* and a series of 10 *Fact Sheets* on housing options for older adults served as a basis for extending AARP's vision of aging in place.
- Creation of *Rx Price Watch*, a new branded series of reports on drug prices paid by consumers, promises to gain significant media attention in 2011.
- A series of *Fact Sheets* on the importance of Social Security served as a key tool in AARP efforts to enhance policymaker understanding of the program at a time when national fiscal pressures are growing.
- Two special in-depth reports, funded by the AARP Foundation, presented a compelling snapshot of poverty among older adults and an overview of the difficulties low-income adults face in accessing financial services.
- Two *Research Reports* based on PPI analysis of the National Long-Term Care Survey presented a picture of major changes in living arrangements for older adults with disabilities.
- A PPI 50-state survey shows for the first time the overall impact of the recession on state-funded long-term services and supports.

PRESENTATIONS

In 2010, PPI staff gave 95 presentations at conferences and annual meetings of stakeholders around the country, with a strong focus on the following:

- Improving quality and access to health care
- Building livable communities
- Supporting caregivers and strengthening long-term services and supports
- Consumer financial protection
- Legal protection for older adults
- Social Security and financial asset building

MEETINGS

This year, PPI held three high-profile Solutions Forums featuring prominent national experts in the areas of financial security and health care. Each of these forums drew 100-200 participants representing federal agencies, congressional offices, and stakeholder organizations. Forums focused on the following:

- Better Care, Lower Costs: the Promise of Patient Engagement—held in collaboration with the Alliance for Health Reform.
- Public and Private Innovations to Effectively Manage Income in Retirement—held in collaboration with ASPPA and WISER.
- Social Security and the Future of Retirement.

PPI held 13 Innovation Roundtables this year, bringing together some of the nation’s leading policy experts and analysts for day-long confidential discussions. Summaries informed staff and board members developing AARP policy positions. Discussions also served as a starting point for AARP leadership on policy formulation in coordination with key stakeholders. Topics included the following:

- Using Financial Incentives to Promote Healthy Behaviors
- Developing Implementation of the CLASS Program
- Removing APRN Practice Barriers (four Roundtables)
- HCBS Implementation: State Challenges and Opportunities
- Applying HIT to LTSS
- Best Practices for Sales of Financial Products: Protecting Consumers with Diminished Capacity
- Establishing a Federal Fiduciary Duty for Investment Product Broker-Dealers
- State HCBS Options Under Health Reform
- Helping States Establish POLST Programs
- Role for New Independent Payment Advisory Board (IPAB)

In addition, PPI launched a series of internal AARP discussions, called Dialogues, on a range of issues. Each of these meetings drew 30 to 40 staff attendees with at least a dozen state offices listening in by phone. Topics included the following:

- Caring for Our Parents
- Supporting CLASS
- Attacking a Major Barrier to Accessing Health Care
- Advocating for Consumer Financial Protection
- Advance Care Planning: Practical Advice and Policy Goals
- Reverse Mortgages and Financial Security: What Recent Changes Mean for Older Homeowners
- Accountable Care Organizations: How Do We Make Them Work for Consumers?

STRATEGIC INITIATIVES

PPI's Strategic Initiatives work expanded this year in three main areas: Nursing, Caregiving, and Long-Term Services and Supports. Highlights include the following:

- The Robert Wood Johnson Foundation awarded the AARP Foundation a \$1.3 million grant for a collaborative effort to implement the recommendations of the Robert Wood Johnson Foundation Initiative on the Future of Nursing at the Institute of Medicine.
- Efforts by PPI's Center to Champion Nursing in America resulted in provisions in the Affordable Care Act for a demonstration project aimed at modernizing how Medicare reimburses for nursing education.
- With the American Academy of Nursing, CCNA Chief Strategist and AARP Senior Vice President and PPI Director Susan Reinhard co-hosted a series of four PPI Innovations Roundtables on increasing consumer access to advanced practice registered nurses by removing practice barriers.
- The Phase II—Professional Partners Supporting Family Caregiving project, supported by the Hartford Foundation, worked with the National Association of Social Workers, the Family Caregiver Alliance, and the U.S. Administration on Aging to develop and disseminate standards of practice for social workers.
- PPI made significant progress in developing the much-anticipated State LTSS Scorecard, which will be the first report of its kind to combine original research and analysis with data from various, disparate sources into a single concise measurement tool for assessing LTSS performance across the states.

2010 PUBLICATIONS

The Employment Situation, December 2009: Overall Unemployment Rate Holds Steady But Ticks Up Slightly for Older Workers—*Fact Sheet*

January 2010—This PPI report highlights the employment and unemployment situation for persons aged 55 and older as of December 2009. The unemployment rate for the total aged 16+ remained unchanged at 10 percent. However, 29,000 more persons aged 55 and over were unemployed in December than in November, bringing this group's total unemployment rate up to 7.2 percent from 7.1 percent.

Age Rating under Comprehensive Health Care Reform—*Insight on the Issues*

January 2010—This report compares the implications of setting premiums for older adults at three times those for younger adults, at two times those for younger adults, and if no age variation is allowed. The analysis finds that at a rating of 3:1, the increased financial burden for older adults is greater than the savings gained by younger adults. Written by Linda Blumberg, Matthew Buettgens, and Bowen Garrett of the Urban Institute, this report updates earlier analysis by the authors looking at implications of a 5:1 rating for older adults.

Resource Tests and Eligibility for Federal Assistance Programs: Effects of Current Rules and Options for Change—*Insight on the Issues*

January 2010—This report looks at how asset tests block low-income people from receiving assistance in key federal programs, including the Medicare Savings Programs and Part D Low Income Subsidy, the Supplemental Security Income Program, and the Supplemental Nutritional Assistance Program (Food Stamps.) Written by independent researcher Mark Merlis, the report examines several options for reforming asset tests and illustrates their impact on eligibility across programs.

Racial and Ethnic Disparities in Influenza and Pneumococcal Immunization Rates among Medicare Beneficiaries—*Insight on the Issues*

January 2010—This report discusses immunization disparities and highlights federal and state initiatives to address them. Despite Medicare's coverage of influenza and pneumonia vaccinations, rates among beneficiaries in general are less than optimal and are even lower among African American and Hispanic beneficiaries.

Health Care Reform and Employer Health Benefits for Non-Medicare Retirees—*Research Report*

February 2010—This report by independent consultant Mark Merlis explores what a number of proposed health care reforms could mean for 3 million early retirees who are not yet eligible for Medicare. It provides a picture of coverage among this population and looks at the implications of changes to market rules and rating practices, new insurance mechanisms such as exchanges, and subsidies for private coverage.

Health Care Reform and Employer Health Benefits for Non-Medicare Retirees—*In Brief*

February 2010—This summary of a report by Mark Merlis explores what a number of proposed health care reforms could mean for 3 million early retirees who are not yet eligible for Medicare. It provides a picture of coverage among this population and looks at the implications of changes to

market rules and rating practices, new insurance mechanisms such as exchanges, and subsidies for private coverage.

The Employment Situation, January 2010: Unemployment Rate for Older Workers Falls—*Fact Sheet*

February 2010—This *Fact Sheet* highlights the employment and unemployment situation for persons aged 55 and older as of January 2010. The unemployment rate for persons aged 55 and over fell to 6.8 percent from 7.2 percent in December 2009. However, half of all older unemployed persons were among the long-term unemployed, that is, they had been out of work for 27 or more weeks.

The Employment Situation, February 2010: Unemployment Rate for Older Workers Increases Again—*Fact Sheet*

March 2010—This report highlights the employment and unemployment situation for persons aged 55 and older as of February 2010. After falling in January, the unemployment rate for persons aged 55 and over rose to 7.1 percent from 6.8 percent. At 35.6 weeks, average duration of unemployment changed little from what it had been in January. Job-seeking discouragement was up sharply.

Strategies to Meet the Housing Needs of Older Adults—*Insight on the Issues*

March 2010—This report discusses housing challenges facing older adults and explores strategies to enable them to remain in their homes and communities as they age.

Adult Foster Care—*Fact Sheet*

March 2010—As states attempt to “balance” LTSS to offer consumers a broader array of services, they need to consider how to develop, regulate, and fund an array of home and community-based services, including adult foster care. This *Fact Sheet* provides a brief overview of adult foster care—a more intimate and homelike alternative to institutional care.

Cohousing for Older Adults—*Fact Sheet*

March 2010—Though relatively new on the residential landscape, cohousing is emerging as an appealing living arrangement for aging adults. Both the physical design and the practice of caring for neighbors as they age make this form of “collaborative housing” appropriate for some adults who wish to age in place among friends and neighbors. This *Fact Sheet* provides an overview of cohousing for older adults.

Connecting Existing Homes with Social Services—*Fact Sheet*

March 2010—Many older adults do not need around-the-clock assistance, but could safely and comfortably remain in their own home with access to some supports and services. This *Fact Sheet* discusses how social service delivery may be coordinated with existing homes.

Expanding Implementation of Universal Design and Visitability Features in the Housing Stock—*Fact Sheet*

March 2010—As adults age and their physical abilities change, they may face environmental impediments in their home that make living independently a challenge. This *Fact Sheet* discusses universal design and visitability features that can improve residential safety and usability for older adults and people with disabilities.

Home Modifications to Promote Independent Living—*Fact Sheet*

March 2010—Most homes have structural barriers that can make it difficult for older adults and people with physical limitations to address their daily needs without assistance. This *Fact Sheet* describes how home modifications can increase safety, accessibility, and independence for older adults in their own homes and discusses policies and programs that support home modifications.

Housing Policy Solutions to Support Aging in Place—*Fact Sheet*

March 2010—Public policy should support a variety of housing options for older adults, including those that allow them the choice to age in their homes and communities. This *Fact Sheet* identifies public policy challenges to aging in place and offers solutions to these challenges.

Linking Transportation and Housing Solutions for Older Adults—*Fact Sheet*

March 2010—Safe, affordable, and accessible transportation choices are critical for older adults who wish to remain independent. This *Fact Sheet* discusses how communities can improve transportation and coordinate housing and land-use policy to help ensure that older adults have good access to needed services and amenities.

Supportive Housing—*Fact Sheet*

March 2010—Supportive housing is an umbrella term for residential settings that have been specifically developed to provide an array of supportive services on site—from group meals and housekeeping assistance to monitoring of chronic health conditions. These developments make it possible for older adults to access the social and health services they need while remaining in a residential setting. This *Fact Sheet* provides an overview of supportive housing models and strategies for meeting demand.

Weatherization—*Fact Sheet*

March 2010—The passage of the American Recovery and Reinvestment Act of 2009 dramatically expanded overall funding of the Weatherization Assistance Program, extending the benefits of energy efficiency to an increasing number of households. This *Fact Sheet* explains the benefits of weatherization, lists resources, and gives policy recommendations.

The Village: A Growing Option for Aging in Place—*Fact Sheet*

March 2010—The village model offers an option for meeting the needs of the growing older population by making it possible for people to stay in their communities and “age in place.” Neighborhood residents create villages to help coordinate and deliver services and supports within their communities. This consumer-driven and person-centered approach can help delay or even prevent the need for institutional care. This *Fact Sheet* provides a brief overview of the village model and its policy implications.

Changing Health Behaviors: Reducing Obesity by Applying Lessons Learned from the Campaign to Control Tobacco Use—*Insight on the Issues*

March 2010—Obesity is a growing problem for Americans of all ages. This *Insight on the Issues* examines the question of whether the same strategies that succeeded in reducing the incidence of smoking in the United States might also work to help reduce obesity rates. Approaches that hold promise include excise taxes, junk food-free zones, counter-advertising, advertising bans, menu labeling requirements, and warning labels.

Policy Options to Improve Specialized Transportation—*Insight on the Issues*

April 2010—Specialized transportation is vital to helping people with mobility limitations live as independently as possible. Authorization of the next surface transportation law provides an opportunity to improve specialized transportation services, particularly those funded by the Federal Transit Administration. This report recommends that policymakers take steps to strengthen coordinated planning, increase support for mobility management, and improve data collection and reporting on these services.

The Employment Situation, March 2010: Unemployment Rate for Older Workers Dips Slightly—*Fact Sheet*

April 2010—This report highlights the employment and unemployment situation for persons aged 55 and older as of March 2010. After rising in February, the March unemployment rate for persons aged 55 and over fell to 6.9 percent from 7.1 percent. At 38.4 weeks, the average duration of unemployment was higher than it was in February. Half of March's older jobseekers had been looking for work for six months or more.

Health Care Reform Legislation Closes the Medicare Part D Coverage Gap—*Fact Sheet*

April 2010—This *Fact Sheet* looks at how health care reform legislation will help reduce prescription drug costs for Medicare beneficiaries.

How Health Reform Adjusts Medicare Advantage Payments and Rewards Quality of Care—*Fact Sheet*

April 2010—This *Fact Sheet* explains changes made to Medicare Advantage payments as part of the health reform package.

Hybrids and Other Alternatives to the Traditional Pension—*Research Report*

April 2010— This PPI *Research Report* argues that the eclipse of the traditional pension and the dominance of the 401(k) plan threaten the financial security of older Americans. Alternative instruments like the cash balance plan and two relatively new enhancements to the 401(k) plan can potentially mitigate this problem.

Hybrids and Other Alternatives to the Traditional Pension—*In Brief*

April 2010— This summary of a PPI *Research Report* argues that the eclipse of the traditional pension and the dominance of the 401(k) plan threaten the financial security of older Americans. Alternative instruments like the cash balance plan and two relatively new enhancements to the 401(k) plan can potentially mitigate this problem.

Older Americans in Poverty: A Snapshot—*Special Report*

April 2010—This report examines the persistent problem of poverty among the elderly in the United States. It presents important data on older adults in poverty—who they are, where they live, and the challenges they face affording basics like food, housing, and health care. Produced in collaboration with the AARP Foundation, the report also examines problems with the official poverty measure and describes a proposal to modernize it.

Social Security: Who's Counting on It?—*Fact Sheet*

May 2010—This report illustrates the importance of resolving Social Security's long-term solvency problem by highlighting the critical role of Social Security in securing the income of many Americans.

Graduate Medical Education and Medicare: Understanding the Issues—*Insight on the Issues*
May 2010—The Medicare program spent about \$9 billion on graduate medical education in 2008. This report looks at whether beneficiaries and taxpayers are getting good value for this investment.

Improvements to Medicare’s Preventive Services under Health Reform—*Fact Sheet*
May 2010—This report looks at how the recent health care reform legislation changes coverage for preventive care services in Medicare.

Attacking Waste, Fraud and Abuse in Health Reform—*Fact Sheet*
May 2010—This PPI *Fact Sheet* describes how recent health reform legislation will help reduce waste, fraud, and abuse in the health care system.

Rx Watchdog Report: Brand Name Drug Prices Continue to Climb Despite Low General Inflation Rate—*Rx Price Watch*
May 2010—This report finds that average manufacturer price increases for brand name and specialty prescription drugs widely used by Medicare beneficiaries continued to far outstrip the price increases for other consumer goods and services in the 12 months ending with March 2010. In contrast, average manufacturer prices for widely used generic drugs fell during the same time period.

Understanding the New Community Living Assistance Services and Supports Program—*Fact Sheet*
May 2010—Recently enacted federal health care reform legislation includes a provision that creates a voluntary national insurance program for long-term services and supports (LTSS). The provision, known as the Community Living Assistance Services and Supports (CLASS) program, aims to help address the financial challenges that many American households face when confronted with the high cost of LTSS.

Health Care Reform Legislation Increases the Availability of Health Insurance—*Fact Sheet*
May 2010—Health care reform legislation recently signed into law will greatly increase the availability of health insurance and broadly impact the delivery of health care in America. This *Fact Sheet* looks specifically at how the legislation helps expand health insurance coverage and make it more affordable.

The Employment Situation, April 2010: Sharp Rise in Duration of Unemployment for Older Workers—*Fact Sheet*
May 2010—This *Fact Sheet* highlights the unemployment situation for persons aged 55 and older as of April 2010. After dipping somewhat in March, the April unemployment rate for persons aged 55 and over rose to 7 percent from 6.9 percent. At 42.9 weeks, the average duration of unemployment was 4.5 weeks longer than it had been in March. More than half of April’s older jobseekers had been looking for work for six months or more.

Annuities and Other Lifetime Income Products: Their Current and Future Role in Retirement Security—*Fact Sheet*
May 2010—This *Fact Sheet* presents initial results of a survey of older Americans on the role that annuities play in pension plans. Older workers are definitely interested in annuities, and many retirees might have been interested had they been available.

Health Reform Provides New Federal Money to Help States Expand Medicaid—*Fact Sheet*

June 2010—This *Fact Sheet* examines how the health reform law makes new federal dollars available to states to provide Medicaid coverage to millions of low-income adults, and how special populations and situations are treated as a result of changes to the Medicaid program.

Health Reform and the Workforce: Will There Be Enough Providers?—*Fact Sheet*

June 2010—This *Fact Sheet* looks at provisions in the new health care reform law aimed at increasing the number of providers available to care for a growing number of insured Americans.

Health Reform Initiatives to Improve Care Coordination and Transitional Care for Chronic Conditions—*Fact Sheet*

June 2010—This PPI *Fact Sheet* describes how recent health reform legislation will improve care coordination and transitional care for people with chronic conditions.

Health Care Reform Improves Access to Medicaid Home and Community-Based Services—*Fact Sheet*

June 2010— This PPI *Fact Sheet* looks at how the new health reform law provides financial incentives for states and creates opportunities within existing programs to promote Medicaid home and community-based services.

Prevalence of Illicit Drug Use in Older Adults: The Impact of the Baby Boom Generation—*Insight on the Issues*

June 2010—This report examines rising illicit drug use and describes unique diagnosis and treatment challenges among persons age 50 and older.

Affordable Home Energy and Health: Making the Connections—*Fact Sheet*

June 2010—This paper details how temperature exposure impacts older adults and offers recommendations to promote access to adequate and affordable home energy.

Preventing the Misleading Use of Senior Designations: What States Should Do—*Insight on the Issues*

June 2010—This paper recommends that states adopt model regulations developed by the North American Securities Administrators Association and the National Association of Insurance Commissioners to protect seniors from fraudulent claims of investment expertise by financial services salespersons.

The Employment Situation, June 2010: A Mixed Picture for Older Workers—*Fact Sheet*

July 2010—This paper shows that the unemployment rate for persons aged 55 and over fell slightly in June—to 6.9 percent from 7.1 percent in May. Duration of unemployment and long-term unemployment for this age group also fell.

Income, Poverty, and Health Insurance Coverage of Older Americans, 2008—*Fact Sheet*

July 2010— This paper shows that median income declined significantly in 2008. The official poverty rate increased for all age groups except for persons age 65 or older. However, a more accurate measure of poverty was double the official rate for older Americans in 2008.

Health Reform Changes Insurance Rules—*Fact Sheet*

July 2010—This paper summarizes how changes mandated by health reform are intended to improve health insurance access, coverage, oversight of premiums, consumer protections, and information.

How Health Reform Will Affect Health Care Quality and the Delivery of Services—*Fact Sheet*

August 2010—This *Fact Sheet* summarizes the major provisions in the Affordable Care Act that address quality improvement and reform of the health care delivery system. It identifies provisions applicable to Medicare, Medicaid, and private health plans, and describes approaches designed to strengthen primary care.

Quick Health Facts 2010: A Compilation of Selected State Data—*Special Report*

August 2010—This publication provides a snapshot of each state’s health care landscape by providing comparable state-level and national data for more than 70 indicators. This report is designed to reflect current health care priorities, with a particular focus on data that are relevant to the provisions of the recently passed health care reform legislation.

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

August 2010—This is the inaugural issue of a new iteration of PPI’s Rx Watchdog series that has tracked manufacturer price changes for widely used prescription drugs since 2004. Price Watch switches to tracking retail prices of drugs widely used by Medicare beneficiaries; previous reports were based on utilization patterns for older Americans in general.

The Employment Situation, July 2010: Little Changed Since June—*Fact Sheet*

August 2010—This report shows that the unemployment rate for persons aged 55 and over remained unchanged at 6.9 percent in July. Duration of unemployment also remained unchanged.

Social Security: A Key Retirement Income Source for Minorities—*Fact Sheet*

September 2010—This report examines older Americans’ reliance on Social Security by race, ethnicity, gender, and nativity, and the factors that affect the level of benefits minorities receive.

A Portrait of Older Underbanked and Unbanked Consumers: Findings from a National Survey—*Special Report and Fact Sheet in Collaboration with AARP Foundation*

September 2010—This report offers a first-ever analysis of the older unbanked and underbanked population. It shows the extent to which older Americans are financially underserved; recommends greater efforts to craft new policies, products, and services to meet the needs of this population; and demonstrates the disproportionate impact on older African Americans and Hispanics.

Saving Jobs Through Work Sharing—*Insight on the Issues*

September 2010—This report examines how work sharing or short-time compensation can help workers keep their jobs in an economic downturn. Under this arrangement, employers reduce work hours and spread the remaining work among employees who receive prorated unemployment benefits. A growing number of states are making legislative changes to accommodate work sharing.

The Employment Situation, August 2010: Sharp Rise in Unemployment among Older Men—*Fact Sheet*

September 2010—This report shows that the unemployment rate for persons aged 55 and over rose in August. Men accounted for this increase, with an unemployment rate of 8.4 percent, up from 7.7 percent in July. The rate for older women remained unchanged at 6.9 percent.

Care Management Practices in Integrated Care Models for Dual Eligibles—*Research Report*

September 2010—This report looks at the administrative challenges facing state-authorized health plans whose members are qualified to receive both Medicare and Medicaid benefits. The plans' objectives and approaches differ in some respects but are similar in many.

Trends in Disability, Community Living, and Caregiving: Analysis of Data from the National Long-Term Care Survey—*Research Reports*

September 2010—These two research reports elucidate important trends in disability, institutional use, community living, family caregiving, and paid home care.

- **More Older People with Disabilities Living in the Community:** Trends from the National Long-Term Care Survey, 1984–2004
- **Trends in Family Caregiving and Paid Home Care for Older People with Disabilities in the Community:** Data from the National Long-Term Care Survey

Trends in Disability, Community Living, and Caregiving: Analysis of Data from the National Long-Term Care Survey—*In Brief*

September 2010—A summary of two research reports that elucidate important trends in disability, institutional use, community living, family caregiving, and paid home care.

Access to Long-Term Services and Supports: A 50-State Survey of Medicaid Financial Eligibility Standards—*Insight on the Issues*

September 2010—This report provides a long-awaited update on Medicaid financial eligibility standards for nursing home and home and community-based waiver services for older persons and adults with disability. PPI and the Congressional Research Service surveyed all states to obtain 2009 data on state selection of optional pathways for Medicaid eligibility, income and asset standards for eligibility, and cost-sharing and other post-eligibility financial requirements.

The Creation of American Health Benefit Exchanges—*Fact Sheet*

September 2010—This report provides an overview of health benefit exchanges. It highlights choices for consumers and states, responsibilities of the federal government, and functions of the exchange and navigator programs, as well as other exchange-related provisions of the Affordable Care Act.

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

October 2010—A presentation of the preliminary findings of an all-state survey on the impact of economic conditions on long-term services and supports, including both Medicaid and non-Medicaid programs. By Susan Reinhard - Senior Vice President, AARP Public Policy Institute; Martha Roherty - Executive Director, National Association of States United for Aging and Disabilities (NASUAD); and Kathy Gifford - Principal, Health Management Associates.

The Employment Situation, September 2010: Older Workers Have Little to Cheer About Once Again—*Fact Sheet*

October 2010—This report shows the unemployment rate for persons aged 55 and over changed little in September, when it was 7.2 percent compared to 7.3 percent in August. Average duration of unemployment rose for older persons, as did job-seeking discouragement.

The Employment Situation, October 2010: Nonfarm Payroll Employment Increases, But Fewer Older Workers Have Jobs—*Fact Sheet*

November 2010—This report highlights the employment situation for older persons as of October 2010. At 7.3 percent, the unemployment rate for persons aged 55 and older was little changed from September's 7.2 percent. Nearly 2.2 million persons in this age group were unemployed in October, 7,000 fewer than in September. For the first time in months, the number of older persons with jobs fell.

Medicare Part D Open Enrollment: Tough Choices for 2011 as Plans Change, Costs Shift—*Fact Sheet*

November 2010—This paper looks at how insurance plans are changing prescription drug coverage under Part D as this year's open enrollment season begins. Some plans are increasing cost-sharing, even as the Affordable Care Act's 50 percent discount on brand-name drugs takes effect for enrollees who hit the "doughnut hole" coverage gap. Protection from high cost-sharing remains for "Extra Help" enrollees, who will see a greater number of plan choices. Beneficiaries are advised to carefully examine plan options.

Impact of Modernizing the American Poverty Measure on the Poverty Status of Older Persons—*Fact Sheet*

November 2010—This report looks at the impact of updating the U.S. poverty measure on older Americans. The official poverty measure in current use is based on consumption patterns from the 1950s. For the past decade, the Census Bureau has published an experimental poverty measure that reflects more modern needs and living standards. This report shows that under the experimental poverty measure, the poverty rate for persons aged 65 or older is 18.5 percent, nearly twice that of the official measure.

Prepaid Cards: Promise and Pitfalls for Consumers—*Insight on the Issues*

December 2010—This report explores the potential benefits and drawbacks of using general purpose reloadable cards and offers recommendations for protecting consumers who use these types of cards.

The Employment Situation, November 2010: Little Holiday Cheer in the News—*Fact Sheet*

December 2010—This *Fact Sheet* highlights the employment situation for older persons as of November 2010. The overall unemployment rate rose from 9.6 percent in October to 9.8 percent. At 7.3 percent, the unemployment rate for persons aged 55 and older was unchanged from the month before. Nearly 2.2 million persons in this age group were unemployed in November—18,000 more than in September.

SOLUTIONS FORUMS

Better Care, Lower Costs: the Promise of Patient Engagement—March 5

Held in collaboration with the Alliance for Health Reform. Ed Howard of the Alliance and John Rother of AARP moderated a discussion about how consumer engagement can improve health outcomes and help control the costs of care.

The program focused on the potential for changing consumer behavior to promote the use of high-value interventions and discourage unnecessary utilization. Panelists included Judy Hibbard, Professor at the University of Oregon; Chad Boulton, Johns Hopkins University; Don Kemper, CEO Healthwise; and Michael Sokol, Corporate Medical Director at Merck.

Lifetime Income Summit: Public and Private Innovations to Effectively Manage Income in Retirement —May 19

Held in collaboration with ASPPA and WISER, this day-long meeting examined public policy recommendations and investment innovations aimed at better management of retirement income.

The summit served as a forum for discussing the challenges faced by both employees preparing for retirement and employers trying to assist them. It looked specifically at how insurance and financial markets might respond to these challenges. Speakers included members of Congress, congressional and administration staff, researchers, and representatives from the financial and insurance industries.

Social Security and the Future of Retirement—September 22

This forum addressed the overriding question of how well Social Security will be able to serve future generations. Discussion included a look at the importance of Social Security to lower and middle income seniors; the impact of increased life expectancy; the changing characteristics of pensions; the expected growth in health care costs; and other obstacles to achieving retirement security.

The panel also discussed how private savings, longer working lives, and delaying benefits may increase retirement security—as well as the limitations of these strategies for different groups. The panel included Alicia Munnell, director of the Center for Retirement Research at Boston College; Alice Rivlin, senior fellow at the Brookings Institution; John Rother, chief policy strategist at AARP; and Madonna Harrington Meyer of the Center for Policy Research at Syracuse University. Journalist Juan Williams moderated the forum.

INNOVATION ROUNDTABLES

Using Financial Incentives to Promote Healthy Behaviors—April 29

This meeting explored the state of the science on the use of financial incentives to encourage healthy behavior; looked at how private and public sector employers are using incentives; and discussed the legal, policy, and ethical considerations of using incentives.

Developing Implementation of the CLASS Program—June 15

This meeting brought together many of the nation's leading experts in a range of fields related to long-term care for a collaborative discussion on how to encourage consumer and employer participation in the new Community Living Assistance Services and Supports (CLASS) program. Experts identified key challenges to successful implementation of CLASS and considered potential solutions.

Removing APRN Practice Barriers—January 6, April 12, May 24, and June 30

A series of four roundtables, sponsored by the Center to Champion Nursing in America and the American Academy of Nursing, focused on increasing consumer access to advanced practice registered nurses (APRNs) by removing practice barriers. The meetings included leaders from 37 national nursing organizations.

HCBS Implementation: State Challenges and Opportunities—October 6

PPI sponsored a dialogue with state officials about the home and community-based service provisions within the new health care law. Discussion covered state opportunities, barriers, and challenges, as well as how AARP and other advocates might support and assist state implementation efforts. The meeting also discussed the Long-Term Services and Supports (LTSS) Scorecard, to be released in mid-2011. That project is intended to help states assess and improve the performance of their LTSS systems, set measurable goals, and track progress toward a LTSS system that offers access, choice, high quality, caregiver support, and integration of LTSS and health-related services.

Applying HIT to LTSS—November 10

This meeting looked at the potential impact of health information technology (HIT) implementation on long-term supports and services: how HIT can drive improved delivery of services and better continuity of care across settings; how HIT can enable more people to remain in their homes through better integration of chronic care management with LTSS; and how to include LTSS providers in medical home teams and accountable care organizations with overall responsibility for promoting independence and wellness.

Best Practices for Sales of Financial Products: Protecting Consumers with Diminished Capacity—November 16

As the population ages, we need to ensure that financial advisors, brokers, insurance agents, and others selling financial products are equipped to respond appropriately when a client signals diminished capacity to make financial decisions. Using a PPI survey of problems companies encounter, their current practices, and educational efforts for their front-line representatives, this meeting brought together industry, regulators, psychologists, lawyers, consumer advocates, and other key stakeholders to explore the issues and develop recommendations.

Establishing a Federal Fiduciary Duty for Investment Product Broker-Dealers—December 1

This meeting discussed the merits and impact of imposing a federal fiduciary duty under Securities and Exchange Commission (SEC) regulations for securities brokers. It focused on how fiduciary duty would affect retail investors, particularly those investing for retirement. Brokers are currently guided by “suitability of investment” guidelines established by FINRA, an industry group. The new financial protection law authorizes the SEC to study and impose a fiduciary standard.

State HCBS Options under Health Reform—December 2

Experts and administration officials discussed home and community-based services (HCBS) policy initiatives that states can pursue under the Affordable Care Act, as well as barriers and challenges to state participation. The discussion focused on suggestions for developing an HCBS policy toolkit for state offices and explored public education /outreach efforts on this issue.

Helping States Establish POLST Programs—December 6

The Physician Orders for Life-Sustaining Treatment (POLST) protocol is designed to improve care near the end of life by converting patients’ treatment preferences into medical orders that are transferable throughout the health care system. Twelve states have POLST programs and many others are considering its use. This roundtable brought together POLST experts and stakeholders to explore the findings of a PPI study on POLST implementation and discuss strategies for promoting broader use of POLST in the context of advance care planning.

Role for New Independent Payment Advisory Board (IPAB)—December 17

Held in collaboration with AARP Government Relations, this roundtable examined issues related to the new Independent Payment Advisory Board (IPAB), which was created as part of the Affordable Care Act. The roundtable focused on three main areas: the implications of the savings targets for growth in the Medicare program; the IPAB process for developing recommendations and implementing mandated spending cuts to the program; and the potential for using IPAB to transform delivery and payment in the Medicare program.

DIALOGUES

Caring for Our Parents—June 1

Urban Institute senior fellow Howard Gleckman, author of the new book *Caring for Our Parents*, led a discussion of major issues facing caregivers today and AARP's role in providing support for caregivers. Issues included how to finance care, ensuring an adequate caregiving workforce, and improving delivery of care.

Supporting CLASS—June 30

The CLASS program, enacted as part of health reform, is a new public program that will provide cash benefits to people who need long-term services and supports. Discussion covered how this program will work, who may be helped by it, and what steps must be taken to facilitate broad participation by workers and employers.

Attacking a Major Barrier to Accessing Health Care—July 22

Health care reform will greatly increase consumer demand for access to primary health care. Discussion focused on how to break down barriers that prevent advanced practice registered nurses from providing high-quality primary care.

Advocating for Consumer Financial Protection—August 26

This meeting looked at major aspects of financial regulatory reform, including the creation of a consumer financial protection agency, and how the new legislation may impact Americans 50 plus. It also discussed how the new legislation affects AARP policy and advocacy.

Advance Care Planning: Practical Advice and Policy Goals—September 24

PPI presented practical advice on the advance health care planning that all of us need to undertake, framed this individual how-to discussion within the national policy context, and provided a preview of current PPI research in this arena.

Reverse Mortgages and Financial Security: What Recent Changes Mean for Older Homeowners—December 13

For most older people, home equity is their primary form of savings. Reverse mortgages enable people to tap that equity while continuing to live in their homes. The discussion highlighted how recent market trends and regulatory changes may affect the attractiveness of reverse mortgages as a financial tool in retirement and what that means for AARP's work on the issue.

Accountable Care Organizations: How Do We Make Them Work for Consumers?—December 15

Explanation of what accountable care organizations (ACOs) are, how the health reform law envisions their role in improving the quality and efficiency of health care, and how patients and

consumers will interact with ACOs. Discussion focused on currently unresolved issues related to patient and consumer involvement with ACOs.

OTHER MEETINGS

Discussion on Health Care and the Future of Nursing—July 28 (CCNA)

Discussion about the recently launched Robert Wood Johnson Foundation Initiative on the Future of Nursing (IFN), announced by the Institute of Medicine (IOM). In addition to the IOM's work, the meeting discussed the Champion Nursing Coalition, representing the voices of consumers, business, education, and health care leaders, all committed to informing their members and constituents about building and ensuring access to a 21st century nursing workforce.

Ethics in a New Financial Marketplace—September 22

AARP/PPI and the Insurance Marketplace Standards Association (IMSA) held a day-long meeting to explore the changing role of ethics in financial services with the goal of helping financial services companies protect consumers, build investor trust, and benchmark corporate ethics programs.

STRATEGIC INITIATIVES

PPI's Strategic Initiatives work expanded this year in three main areas: Nursing, Caregiving, and Long-Term Services and Supports.

INITIATIVE ON THE FUTURE OF NURSING: CAMPAIGN FOR ACTION

The Robert Wood Johnson Foundation ("RWJF") awarded the AARP Foundation a \$1.3 million grant for a collaborative effort to implement the recommendations of the Robert Wood Johnson Foundation Initiative on the Future of Nursing, at the Institute of Medicine. The PPI Strategic Initiatives team works with RWJF as an implementation partner in the Campaign for Action.

As part of the implementation, RWJF and AARP are establishing significant partnerships from diverse sectors, including health care, insurers, consumers, business, government, foundations, and academia. PPI is providing strategic direction and operational coordination, which includes convening national and state coalitions to create a transformed health care workforce through the implementation of the IOM report's recommendations on the future of nursing.

CENTER TO CHAMPION NURSING IN AMERICA

Policy

Efforts by PPI's Center to Champion Nursing in America resulted in provisions in the Affordable Care Act ("ACA") that created a demonstration project aimed at modernizing how Medicare reimburses for nursing education. The demonstration will provide funding to train greater numbers of advanced practice nurses, targeting money to educate nurses with specific skills needed for Medicare patients.

CCNA leadership and staff also supported AARP efforts related to the ACA, including transitional care and other workforce provisions.

CCNA worked with AARP's Board of Directors and National Policy Council to update *Policy Book* language on nursing scope of practice.

Events

With the American Academy of Nursing, CCNA Chief Strategist and AARP Senior Vice President and PPI Director Susan Reinhard co-hosted a series of four PPI Innovations Roundtables on increasing consumer access to advanced practice registered nurses (APRNs) by removing practice barriers. The meetings included leaders from 37 national nursing organizations.

In January, CCNA coordinated a luncheon cosponsored by AARP and the Association of American Medical Colleges for the Robert Wood Johnson Foundation Initiative on the Future of Nursing, at the IOM. At the meeting, IOM committee members held an informal and open dialogue with physician leaders about the future of nursing.

In May, CCNA convened a meeting of its 31 state team leaders, all working to increase nursing education and build a 21st century nursing workforce in their states. Teams discussed

accomplishments, lessons learned, and future needs. Teams also discussed health care reform implementation, including the impact on nursing and ways to communicate with consumers.

In June, CCNA co-hosted with AARP Rhode Island and the Rhode Island State Nurses Association, a forum on board governance and nurse leadership. The event featured remarks from AARP Board Chair Phil Zarlengo; Senior Vice President and CCNA Chief Strategist Susan Reinhard; and CCNA Director Brenda Cleary. Susan Reinhard and Brenda Cleary also moderated two panels.

In July, CCNA hosted a PPI Dialogue on Barriers and Access to Care: Nursing. The discussion featured Senior Vice President and PPI Director Susan Reinhard; Vice President for Government Relations Elaine Ryan; Iowa Senior State Director Bruce Koepl; and Center to Champion Nursing in America Strategic Policy Advisor Andrea Brassard. More than 40 staff from the national office attended, as well as numerous state offices via video and teleconference.

In July, CCNA convened more than 50 leaders from consumer, health care, and business groups to discuss shared interest in ensuring all Americans have access to a highly skilled nurse when and where they need one. Executive Vice President John Rother was the featured speaker. Senior Vice President and PPI Director Susan Reinhard hosted the meeting at the IOM along with leaders from the Robert Wood Johnson Foundation Initiative on the Future of Nursing.. Representatives from Target, GE, Aetna, the American Hospital Association, and Verizon, among others, attended.

In October, CCNA hosted a reception honoring former Health and Human Services Secretary Donna Shalala and CNO of Cedars Sinai Health System Linda Burnes Bolton. The event marked the release of the recommendations of the RWJF Initiative on the Future of Nursing, at the IOM.

In October, CCNA hosted a webinar with more than 100 representatives of national and state nursing, health care, consumer, and business organizations. The Webinar briefing was facilitated by Senior Vice President Susan Reinhard and featured former AARP Board Chair Jennie Chin Hansen.

Publications

CCNA Quarterly E-Newsletter: Produced four.

Consumer Access & Barriers to Care: Physician-Nurse Practitioner Restrictive Collaboration Requirements by State / *Map*

February 2010 – A state-by-state look at physician oversight requirements for nurse practitioners.

Improving Access to Primary Care: The Growing Role of Advanced Practice Registered Nurses / *Fact Sheet*

July 2010 – Nurse Practitioners (NPs) and Certified Nurse-Midwives (CNMs) provide primary care. NPs and CNMs take health histories, provide complete physical exams, diagnose and treat many common acute and chronic problems, interpret lab results and other diagnostic tests, prescribe medications, and teach and counsel patients and their families about health and illness.

Nursing Workforce Solutions for 21st Century Health Care: Addressing Education Capacity / *Fact Sheet*

May 2010 – Registered Nurses (RNs) are positioned across the health care system to provide high-quality health care, increase access to health care services, and keep costs down. Unfortunately, as

our population ages and requires more complex health care, we are facing a shortage of RNs—260,000 over the next 15 years. This paper discusses the education capacity problem and suggested solutions.

Nursing’s Role in Safeguarding Quality and Safety / *Fact Sheet*

May 2010 – The new health care reform law, the impact of technological innovations, workforce transitions, and a growing, aging population are propelling health system change. In every setting where health care is delivered—from clinics to hospitals to schools and in homes—nurses are central to the design and adoption of innovations needed to ensure the quality and safety of care provided in this changing health care system.

Nursing-Related Provisions in Health Care Reform Legislation / *Chart*

April 2010 – Chart detailing the nursing-related provisions in the Patient Protection and Affordable Care Act.

Access to Care and Advanced Practice Nurses: A Review of Southern U.S. Practice Laws / *Brief*

April 2010 – Examines scope of practice laws in the southern states.

Media

Uniting States, Sharing Strategies: Seven-part AJN/CCNA Series on Nursing Education Capacity Solutions

April 2010 – CCNA’s seven-part series on nursing education capacity solutions, published in the *American Journal of Nursing*, describes a public and private collaborative effort to redesign nursing education to prepare the future nursing workforce.

Nursing in Health Care Reform Legislation: *Modern Healthcare, Advance for Nurses, NurseZone*

Nursing Scope of Practice: *AARP.org, Hospitals and Health Networks*

CAREGIVING

The Phase II–Professional Partners Supporting Family Caregivers project, supported by a grant from The John A. Hartford Foundation under the leadership of PPI’s Dr. Susan Reinhard, continued to make some significant progress in meeting its objectives during 2010. Working with the National Association of Social Workers, the project played a major role in the release of “NASW Standards of Social Work Practice with Family Caregivers of Older Adults” in November. In addition, PPI is partnering with the Family Caregiver Alliance, the U.S. Administration on Aging, and the New Jersey Department of Health and Senior Services to work with the Aging and Disability Resource Centers (ADRCs) in New Jersey to improve caregiver assessment and support.

A grant from the Jacob & Valeria Langeloth Foundation is being used to augment the Hartford Foundation–funded work by developing tools to enable nurses to provide better support to diverse family caregivers across settings. The grant is in partnership with the Nurses Improving Care for Health System Elders (NICHE) program of the Hartford Institute for Geriatric Training at New York University and the *American Journal of Nursing*. This work includes using focus groups to

examine the unique experiences of nurses, social workers, and family caregivers in diverse communities. The research will be used to identify gaps in knowledge and offer recommendations to better equip professional partners. Additional deliverables include a training module for nurses who work with family caregivers in hospital and community settings, a series of “how to” videos and articles that can be used to earn CEUs.

LONG-TERM SERVICES AND SUPPORTS: THE STATE SCORECARD

This year, PPI made significant progress in developing the much-anticipated State LTSS Scorecard, which will be the first report of its kind to combine original research and analysis with data from various, disparate sources into a single concise measurement tool for assessing LTSS performance across the states. All 50 states and the District of Columbia will receive an overall rank based on five characteristics of a high-performing LTSS system, as well as a rank for each of five individual characteristics. The Scorecard will bring attention to the wide variations that exist among states and provide the data and analysis that state policymakers need to put their state LTSS systems into context so they may improve their programs and policies.

In 2010, the Scorecard team also developed a clear definition of LTSS that is broad enough to provide a comprehensive look at LTSS, but focused enough to drive public policy and action. The results of this study, as well as a comprehensive description of what a high-performing LTSS system entails, were established in a white paper written by PPI that will most likely be published in a national health journal in the spring of 2011. The State LTSS Scorecard will be released in the summer of 2011, accompanied by the launch of an interactive website highlighting all of the Scorecard’s findings.

PPI STAFF PRESENTATIONS

Caregiving

“Professional Partners Supporting Family Caregivers,” presented by Susan Reinhard at the Rosalynn Carter Institute for Caregiving’s (RCI) 2010 National Summit on October 22. Her presentation focused on a project PPI is implementing with grants from the Langeloth and Hartford Foundations. The project was recognized at the RCI Summit as one of three nominees for the 2010 Rosalynn Carter Leadership in Caregiving Award.

“Entering the World of Caregivers: Reducing Complexities,” presented by Susan Reinhard at the 5th International Careers Conference in Leeds, UK, on July 10.

“How Health Reform Will Benefit Family Caregivers,” presented by Susan Reinhard to the Annual American Society on Aging/National Council on Aging Annual Meeting.

“Making Our Voices Heard, Mobilizing Family Caregivers as Advocates,” presented by Susan Reinhard to the Annual American Society on Aging/National Council on Aging Annual Meeting.

“Caregiving in an Economic Downturn: Caregiver Support in the States,” presented by Susan Reinhard to the Annual American Society on Aging/National Council on Aging Annual Meeting.

“Seeking Refuge: Trends in Family Caregiving,” presented by Rita Choula and Ari Houser at the NASUAD Home and Community Based Services. Atlanta, GA, September 28.

Consumer Financial Protection

“Retirement Security in a Regulated Marketplace – Annuities in 2010 and Beyond,” a summit co-hosted by Elizabeth Costle and Ryan Wilson with the Insurance Marketplace Standards Association. The summit brought together insurance company compliance officials, state and federal regulators, and consumer representatives to discuss challenges to protecting consumers in the annuities marketplace.

“Consumer Financial Issues,” presented by Elizabeth Costle at the Federal Reserve Forum on Consumer Research & Testing: Tools for Evidence-Based Policymaking in Financial Services.

“Older Unbanked and Underbanked Consumers,” presented by Elizabeth Costle at the FDIC’s Advisory Committee on Economic Inclusion.

“Annuity Suitability: What are the Answers?” presented by Ryan Wilson at the National Conference of Insurance Legislators, Isle of Palms, SC, March 5.

“Meeting Research Expectations,” presented by Ryan Wilson at the American Council of Consumer Interests, Atlanta, GA, April 14.

“Issues Affecting Older Investors: Investor Protection and Beyond,” presented by Ryan Wilson at the Securities Industry and Financial Markets Association (SIFMA) Compliance and Legal Section, National Harbor, MD, May 7.

“Retirement Investor Protection Research,” presented by Ryan Wilson at the Retirement Industry Trust Association (RITA), Washington, DC, May 20.

Energy and Internet

“Broadband for Successful Aging,” presented by Chris Baker at the Pike & Fisher's Broadband Policy Summit VI, Washington, DC, June 10.

“The Importance of Broadband Use for the Older Population,” presented by Chris Baker during a meeting hosted by the Leadership Conference on Civil and Human Rights, Washington, DC, June 28, 2010.

”Affordable Home Energy and Health: Making the Connections,” presented by Chris Baker in a webinar hosted by New York State Energy Research and Development Authority’s Low-Income Forum on Energy, November 17.

Guardianship and Advanced Care Planning

“Medicaid Support for Guardianship Services: Where Do We Stand?” presented by Naomi Karp at the Annual Meeting of the National Guardianship Association, Hershey, PA, October 4, 2010.

“Focus Group on Guardianship Standards of Practice,” conducted by Naomi Karp in preparation for the 2011 Third National Guardianship Summit of which AARP is a cosponsor, Hershey, PA, October 4.

“Train the Trainers Session on Advance Care Planning and Advance Directives,” conducted by Naomi Karp for AARP’s Boomer Women Project. The Education & Outreach project is training leaders from the National Council of Negro Women, the American Association of University Women, and MANA (a national Latina organization) on planning for long-term care, April 23.

“Standards for Guardian Decision-Making,” presented by Naomi Karp to the National Aging and Law Conference, Alexandria, VA, December 9.

“Advance Care Planning and the POLST (Physicians Orders for Life-Sustaining Treatment) Program,” presented by Naomi Karp, Alexandria, VA, December 11.

Improving Health Care

“Health Reform Medicare and Older Adults,” keynote speech presented by Susan Reinhard at the University of Iowa’s forum “Rebalancing Health Care in the Heartland: Enhancing Geriatric Care Across Iowa” conference in Des Moines, IA, on September 30.

“The Future of Medicare: Our Chronic Care Challenge,” presented by Susan Reinhard to the Annual American Society on Aging/National Council on Aging Annual Meeting.

“Health and Long-Term Care: Are International Workers Indispensable?” presented by Susan Reinhard to the American Society on Aging/National Council on Aging Annual Meeting.

“State Experiences with Dual Eligible Medicare Advantage Special Needs Plans,” presented by Lynda Flowers at the Legislative Fly-In meeting sponsored by the Association of Community Affiliated Plans (ACIP).

“Medicare Changes in the Health Reform Law,” presented by Lynn Nonnemaker at a Health Care Reform Forum sponsored by AARP Maryland, The Maryland Health Care Coalition, and Maryland Health Care for All, Baltimore, MD, June 24–25.

“Applying Successful Strategies to Control Tobacco to the Problem of Obesity,” presented by Lynda Flowers at the 5th Annual World Congress on Obesity

“Integrating Care for Dual Eligibles,” presented by Lina Walker on a panel that highlighted the results of PPI’s recently released report at the National Academy for State Health Policy (NASHP) conference in New Orleans, LA, on October 4.

“Hill/Consumer/Agency Representatives' Perspective on Health Innovation, Technology and Policy,” Susan Reinhard, panelist, on November 12, at the American Academy of Nursing (AAN) annual conference.

“Medicare Changes in the Health Reform Law,” presented by Lynda Flowers at a Health Care Reform Forum in Baltimore sponsored by AARP Maryland, The Maryland Health Care Coalition, and Maryland Health Care for All.

“Dialogue for Action on Colorectal Cancer Screening,” opening session of the Prevent Cancer Foundation meeting, moderated by Lynda Flowers.

“Ensuring Access to Effective Patient Medication Information,” Lee Rucker was a panelist at this Brookings’ Engelberg Center for Health Care Reform’s workshop moderated by Brookings’ Mark McClellan, Washington, DC, October 12.

“AARP Policy on Exchanges,” presented by Gerry Smolka on a webinar, October 23.

“How to Navigate Your Way around Your Physician’s Office” presented by Andrea Brassard at AARP’s National Event and Expo Orlando @50, Orlando FL, October 1.

“Redesigning Health Care Workforce for the Right Primary Care Skill Mix,” presented by Susan Reinhard at the 2010 National Health Policy Conference sponsored by Academy Health.

“Chronic Care Complexity and Coordination,” a panel moderated by Susan Reinhard, at the Academy Health 2010 Annual Research Meeting in Boston, June 27.

“Preparing the Workforce for a Reformed Health Care System: Toward a Research Agenda,” Susan Reinhard spoke on a panel sponsored by the John J. Heldrich Center for Workforce Development and the Center for State Health Policy at Rutgers University, on October 25. .

“Nurse Delegation in Home Care Agencies Serving Persons,” presented by Susan Reinhard with Pamela Doty, Office of the Assistant Secretary for Planning and Evaluation (ASPE), at a Nurse Delegation Pilot in New Jersey on September 26.

“The Future of Nursing: Leading Change, Advancing Health” at Columbia University, on November 8, featured Susan Reinhard as a panelist.

“Looking Back to Move Forward” at the 10th Annual American Academy of Nursing’s Building Academic Geriatric Nursing Capacity (BAGNC) conference, in New Orleans, Louisiana, featured Susan Reinhard as a panelist.

Susan Reinhard presented at the 2010 National Council of State Boards of Nursing (NCSBN) Advanced Practice Registered Nurses (APRN) Roundtable on May 19. The Roundtable was an opportunity for APRN stakeholders to discuss common issues and concerns regarding APRNs.

"Consumers and Advanced Practice Nurses" presented by Andrea Brassard at the Ohio Association of Advanced Practice Nurses 20th Annual Statewide Educational Conference and Meeting, Dublin, OH, November 4.

“Barriers and Facilitators to Advanced Practice Nursing in the United States,” presented by Susan Reinhard to the Health Division of the OECD in Paris, February.

“The Promises of Nursing in the 21st Century”, keynote address presented by Brenda Cleary at California Statewide Nursing Education Conference, Los Angeles, on March 10.

“Nurses on Corporate Boards,” panel presentation by Brenda Cleary at a meeting of RWJ Executive Nurse Fellows and Alumni, Atlanta, GA, on April 10.

“Expanding Nursing’s Influence in the 21st Century,” presented by Brenda Cleary at the Second Annual Doctor of Nursing Practice Student Symposium on Health Care Policy and Advocacy, sponsored by Thomas Jefferson University’s School of Nursing, Philadelphia, June 5.

“Board Governance and Nurse Leadership” panels, moderated by Brenda Cleary and co-hosted by the Center to Champion Nursing in America (CCNA), AARP Rhode Island, and the Rhode Island State Nurses Association. Providence, RI, on June 4.

“State Nursing Workforce Centers Closing Panel,” presentation by Brenda Cleary in Dearborn MI, June 9–10.

"The Evidence for Expanding Nursing Leadership in the 21st Century," presented by Brenda Cleary at a regional Veterans Administration Nursing Conference, Washington, DC, July 27.

“What Public Health Nursing Needs to Know about Health Care Reform,” keynote address presented by Brenda Cleary at the Michigan Public Health Training Center at the University of Michigan and the Michigan Department of Community Health - Office of the Chief Nurse Executive, Lansing, MI, August 27.

“Nurses Roles in Health Care Reform,” presented by Brenda Cleary at the NC Nurses Association Annual Conference, Winston-Salem, NC.

“Retaining Older Nurses,” a presentation by Brenda Cleary about a program that retains older nurses while retooling them to provide geropalliative care to six health systems across the country implementing Massachusetts General Hospital’s AgeWise, Boston, MA, November 9.

“Expanding Nursing's Influence in 21st Century Health Care,” keynote address presented by Brenda Cleary at MA statewide convening of nurse educators and nurse executives, Boston, MA, November 19.

“Consumers and Nursing: The Center to Champion Nursing in America at AARP,” presented by Winifred Quinn at the American College of Nurse Practitioners Public Policy Institute for Health Professionals, February 26.

“Nursing in the ACA,” presented by Winifred Quinn to the Robert Wood Johnson Foundation Conference on Undergraduate Nursing Education, October 22.

Livable Communities

“AARP’s Livable Communities Policy,” presented by Rodney Harrell at the JFK School at Harvard University. Cosponsors of this meeting included Living Cities, the Rockefeller Foundation, and the Kennedy School, Cambridge, MA, January 29.

“Increasing Adoption of Universal Design,” presented by Rodney Harrell at the Universal Design Summit 4, St. Louis, MO, October 12.

“The Built Environment and Healthy Aging,” presented by Rodney Harrell with HUD and EPA representatives as part of a webinar series on “Environmental Threats to Healthy Aging” by the American Association on Intellectual and Developmental Disabilities (AAIDD) and Greater Boston Physicians for Social Responsibility (PSR), October 19.

“Sustainable Communities: Progress from Federal Partners,” presented by Rodney Harrell at the American Public Health Association annual meeting, Denver, CO, November 10.

“Sustaining Aging,” presented by Rodney Harrell at the national conference of the American Planning Association, New Orleans, LA, April 12.

“Demographic and Policy Trends,” keynote speech presented by Rodney Harrell at the University of Maryland School of Architecture, Planning, and Preservation for the Colvin Institute of Real Estate Development and the Neighborhood Development Collaborative’s 3rd Annual Spring

Symposium: “Senior Housing Design and Development: The Next Generation,” College Park, MD, May 7.

“Creating Affordable and Sustainable Age-Friendly Cities,” presented by Rodney Harrell at the Affordability & Safety of Livable Communities: Lessons from Around the World meeting sponsored by AARP International, Washington, DC, June 30.

“Sustainable Models of Aging in Place, presented by Rodney Harrell to the Washington Regional Area Grantmakers as part of a panel discussion, Washington, DC, September 23.

“Choosing ‘Opportunity Sites’ for Location-Efficient Development,” presented by Rodney Harrell at the Partners in Innovation: Including Affordable and Workforce Housing within Transit-Oriented Development symposium in Denver, CO, September 27.

“Shifting the Balance of Power,” presented by Rodney Harrell as part of joint webinar with CFED and the National Consumer Law Center, on “Fundamental Freedoms in Manufactured Home Communities,” July 28.

“The Built Environment, Disability, and Healthy Aging,” presented by Rodney Harrell on the Association of University Centers on Disabilities (AUCD) webinar series, December 9.

Presentation on livable communities by Enid Kassner to the Aging and Health Policy Fellows Symposium, Washington, DC, June.

“Complete Streets,” presentation by Jana Lynott at the AAA Foundation for Traffic Safety Aging and Mobility Roundtable, Washington, DC, January 7.

“Transportation for an Aging America,” presented by Jana Lynott on a National Consumer Law Center webinar, June 9.

“Planning Complete Streets for an Aging America,” presented by Jana Lynott to approximately 20 members of the Road Safety Foundation Steering Committee, including several staff members from the FHWA Office of Safety, Washington, DC, March, 17.

“Sustaining Aging,” presented by Jana Lynott at the national conference of the American Planning Association, New Orleans, April 11.

“The State of Public Transportation Services for Older Adults,” presented by Jana Lynott as part of AARP Global Network’s Policy and Advocacy teleconference ,Washington, DC, April 22.

“Livable Communities and Aging,” presented by Jana Lynott at the American Planning Association—Delaware chapter annual conference on Friday, Dover, DE, May 7.

“Policy, Design and Importance of Accessible Pedestrian Environments for Livable Communities,” presented by Jana Lynott as part of Easter Seals Project Action Initiative, May 18.

“The Role of Public Transportation in Creating Livable Communities,” presented by Jana Lynott at the Community Transportation Association of America annual meeting in Long Beach, CA, May 27.

“Road Safety and Age-Friendly Environments,” panel moderated by Jana Lynott at AARP International’s event, “Affordability & Safety of Livable Communities: Lessons from around the World,” June 30.

“Planning Complete Streets for an Aging America,” presented by Jana Lynott in a meeting with Richard Deveylder, Senior Advisor for Accessible Transportation, USDOT Office of the Secretary.

Keynote address, delivered by Jana Lynott at AARP Louisiana’s statewide Human Services Transportation conference, December 3.

Long-Term Services and Supports

“Problems in the LTC System,” presented by Enid Kassner at a conference sponsored by the Maxwell School of Public Policy at Syracuse University, June.

“Impact of the Great Recession on Long-Term Services and Supports,” presented by Susan Reinhard at the Home and Community Based Services (HCBS) Conference in Atlanta, GA, September 27.

“Medicaid and Medicare Financing of Long-Term Care,” presented by Lynda Flowers to a group of women representing the National Latin Organization, the National Council of Negro Women, and the American Association of University Women.

“Safe at Home? Criminal Background Checks and Other Screening Policies for Home Care Workers,” presented by Naomi Karp at the Annual Conference of the National Association of Area Agencies on Aging, July 10

“Tapping Home Equity for Long-Term Care Expenses,” presented by Don Redfoot at the Gerontological Society of America, New Orleans, LA, November 20.

"Using Housing Equity to Finance Long-Term Services and Supports," presented by Lina Walker at the Michigan Retirement Research Center annual research workshop at the University of Michigan, April 10th.

"Access to Long-Term Services and Supports: A 50-State Survey of Medicaid Financial Eligibility Standards," presented by Lina Walker on a panel at the HCBS conference in Atlanta, GA, on September 27.

“Long-Term Support System (LTSS) Indicators Research and Data,” presented by Susan Reinhard at a summit sponsored by the Centers for Medicare and Medicaid Services (CMS), October 28.

“New Provisions to Expand Home and Community-based Services Enacted as Part of the Affordable Care Act,” roundtable moderated by Lina Walker and Wendy Fox-Grage at the NASHP meeting in New Orleans, LA, October 6.

Reverse Mortgages

“Reverse Mortgages and Consumer Protection,” presented by Don Redfoot to the DC Bar Association, Washington, DC, April 19.

“Reverse Mortgages,” presented by Don Redfoot to the Society of Actuaries meeting, New York, NY, October 20.

Social Security and Economic Policy

"What's Holding Back Consumer Demand for Lifetime Income Options: Evidence from Behavioral Finance," presented by Lina Walker at the Lifetime Income Summit, May 20.

"Deficit Commissions' Social Security Solvency Proposals," presented by Gary Koenig to AARP National Policy Committee, Washington, DC, December 14.

"Evaluating Social Security Solvency Proposals," presented by Gary Koenig to AARP National Policy Committee on Washington, DC, November 3.

"Social Security Solvency Provisions: How They Work and Who Is Impacted," presented by Gary Koenig to AARP National Policy Committee, Washington, DC, June.

“Current State and Prospects for the Economy,” presented by Sandy Mackenzie to the National Policy Council, Washington, DC, September 17.

FOCUS ON THOUGHT LEADERSHIP

PPI focuses on developing policy solutions to the critical problems facing older Americans and on conducting forums for expert analysis of issues, ideas, and policy solutions among a wide range of thought and opinion leaders.

Our goal is to have to a major impact on thought leader engagement and public consideration of policy issues. Our model to increase our impact in the marketplace of ideas emphasizes use of complementary, interrelated strategies.

