

BIENNIAL REPORT

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Letter from the President and Chair

January 2004

During 2002 and 2003, The National Council on the Aging (NCOA) helped to improve the lives of millions of older Americans, strengthen services and programs in hundreds of communities nationwide, and provide important leadership to the field of aging.

We are pleased to report that NCOA's national voice on aging issues continues to be heard loud and clear. For example, NCOA has succeeded in getting language about the importance of targeted outreach, education, and enrollment activities for low-income seniors into the final Medicare law. In addition, our thoughtful and balanced analyses of public policy issues continue to be read and respected by policymakers and advocates. Our *American Perceptions on Aging* study is frequently cited in the media and elsewhere as the "go to" source of information about seniors' attitudes on myriad issues.

In the past two years, NCOA has also increased its prominence as a leading innovator in services and programs for older adults. With the help of leading foundations and government agencies, we launched a groundbreaking research and development program to develop evidence-based, community programs that improve the health and well-being of seniors. In addition, we initiated several innovative strategies to improve the financing of long-term care.

As an activator, NCOA continues its leadership in the diffusion of effective programs that benefit seniors and communities across the country. For instance, NCOA and its local partners trained and placed more than 17,000 low-income seniors in community service jobs. Through our Family Friends program, we helped link more than 2,350 seniors with families of children with disabilities. In addition, BenefitsCheckUp® continues to provide thousands of seniors and their caregivers with help in finding out about federal and state benefits as well as prescription savings programs. NCOA's well-known program reached its millionth user this past summer.

NCOA is increasingly known for its ability to use partnership development creatively to achieve important societal and organizational objectives. Partnerships with other non-profit organizations both in and out of the field of aging are at the heart of two new projects—RespectAbility and Use Your Home to Stay at Home™. RespectAbility is designed to promote civic engagement among older Americans. Working with experts from financial services and the insurance industry as well as government, consumer, and other national non-profit organizations, Use Your Home to Stay at Home is exploring how reverse mortgages can be used to finance long-term care.

NCOA is proud to have a network of some 4,000 members who enjoy benefits such as our joint conference with the American Society on Aging, *NCOA Week*, our Web site and our *Innovations* magazine. Many network members regularly assist NCOA in advocating for funding the Older Americans Act or other important issues. Still others value the networking opportunities NCOA continues to provide through its constituent units such as the National Institute of Senior Centers and the Health Promotion Institute.

Like ones before it, this report describes what we are doing to meet the "ends" or "results" established by the Board of Directors as well as program highlights and financial results from the past two years. We gratefully acknowledge our many generous funders—foundations, corporations, government agencies, and individual donors—without whom we could not continue to provide our research, advocacy, innovations, and support to community-service organizations throughout the United States.

James P. Firman, Ed.D.
President and CEO

Sandra King
Chair of NCOA Board

National Voice

We are a national voice and powerful advocate for public policies, societal attitudes, and business practices that promote vital aging.

■ **Medicare Prescription Drug Law.** For nearly two years, NCOA worked behind the scenes to help Congress craft a prescription drug benefit that would be affordable, universal, and voluntary and would guard against the erosion of any other coverage. NCOA advocated strongly for a benefit that would give much-needed assistance to low-income beneficiaries. The new law, which NCOA supported after careful consideration and much deliberation, meets those objectives and reflects NCOA concerns about ensuring a strong federal commitment to outreach and enrollment activities.

■ **Older Americans Act (OAA) Funding.** For FY 2003, NCOA and its members successfully advocated for increased funding for programs such as supportive services, the National Family Caregiver Support Program, meals programs, and the Title V Senior Community Service Employment Program.

■ **Leadership Council of Aging Organizations (LCAO).** In 2002-03, NCOA chaired the 50-member LCAO, a coalition composed of leading national aging organizations. During this time, NCOA led, staffed, and helped support LCAO's efforts on critical issues affecting older persons such as Medicare, Social Security, long-term care and tax policy.

With support from the AARP Foundation, NCOA released *American Perceptions on Aging*, a chart book based on the *2000 Myths and Realities of Aging* study at the 2003 joint annual conference. Since its release, over 3,000 copies have been distributed and the study has been mentioned in dozens of national magazines and daily newspaper articles.

In collaboration with corporate sponsors, NCOA continued to promote awareness of diseases that affect older Americans. In 2002-03, with support from Pfizer, NCOA and several of its members nationwide helped raise knowledge of peripheral arterial disease through media and local educational events at senior centers nationwide. In 2003, NCOA and Bristol-Myers Squibb/Sanofi-Synthelabo launched a highly successful awareness campaign to educate seniors about the risks associated with stroke.



Activator

We are activators, turning evidence-based solutions into creative programs and services that help community service organizations serve seniors in hundreds of communities nationwide.

Vital Aging Center— Health Studies

In September 2003, NCOA's Vital Aging Center—Health Studies was named as the Administration on Aging's (AoA) National Resource Center on Evidence-based Prevention for Older Adults. The Resource Center will bring national attention to the importance and benefit of prevention, chronic disease self management and health promotion for older adults. It will provide leadership on initiatives related to prevention and health promotion and direct technical assistance to 12 local demonstration projects. This work, in particular, will advance NCOA's growing expertise in using evidence-based programming to help seniors and also in the diffusion and adoption of such programs to community-based organizations that serve older adults and their families.

Family Friends

Family Friends is an intergenerational program pioneered by NCOA. For nearly 20 years, Family Friends programs around the country have captured the skills, knowledge, and dedication of older volunteers to help families of children with disabilities and/or chronic illnesses. Recent evaluations of local projects show that Family Friends produces important benefits for both families and the older volunteers. Parents participating in the program reported an increased sense of control and ability to handle things better and said they felt more supported and less lonely because of the program. Volunteers, too, reported that they benefited from the relationships formed, and from the resources and sup-

port they received from Family Friends staff on the local level. The U.S. Administration on Aging has been supporting the program since 1990. In 2003, NCOA received a new, three-year grant that will fund the National Center for Family Friends at NCOA. The Center is a tribute to the dedication of Program Director Miriam Charnow who passed away last April.

BenefitsCheckUp® Mobilization Efforts

Many low-income seniors lack access to the Internet or have literacy problems and are therefore unable to take advantage of programs like BenefitsCheckUp without help from others. To address this problem, NCOA has been recruiting community organizations to reach out to disadvantaged seniors, help them to learn about the benefits for which they are eligible and assist them with application forms. By the end of 2003, there were more than 1,100 community organizations nationwide not only promoting BenefitsCheckUp in their communities, but also actively conducting benefits screenings.

Senior Community Service Jobs Program

NCOA's Workforce Development Division helps mature workers aged 55 and older to find gainful employment, increase their incomes, and learn new skills. The Senior Community Service Employment Program (SCSEP), authorized under Title V of the Older Americans Act, enables NCOA to

Continued on next page.

Employing Partnerships

We employ partnership development through the creation or fostering of national and local partnerships that build bridges and create synergy among a wide variety of voluntary and public organizations.

RespectAbility

In mid-2003, NCOA began work on a project with several partners to create opportunities for older Americans to renew their communities through volunteer work or work in retirement. In conjunction with the National Assembly of Health and Welfare Organizations and Lipman Hearne, a leading Chicago-based marketing and communications firm, NCOA will conduct research, launch a national media campaign, and develop model approaches in select communities. With a generous grant from Atlantic Philanthropies, the three-year RespectAbility initiative will do extensive research and produce a video for airing on public television. RespectAbility will also engage CEOs of leading national nonprofits and their affiliates in a rigorous research agenda to learn what the government and voluntary sectors can do differently to increase the numbers of older Americans who make such contributions.

Use Your Home to Stay at Home™

Making use of a Panel of Experts from government, industry, and non-profit organizations, NCOA's Use Your Home to Stay at Home project is combining research, consumer surveys, and discussions with experts to identify cost-effective government interventions and other incentives that can facilitate the use of reverse mortgages in long-term care. The outcome of the project will be a *National Blueprint for Increasing the Use of Reverse Mortgages for Long-Term Care* report, which will offer new insights into the potential market for reverse mortgages along with recommendations for administrative action, regulatory changes, and demonstration programs.

BenefitsCheckUp®, AARP, AOL and Other Partners

In late 2002, NCOA formed a partnership with AARP to help publicize BenefitsCheckUp through its various media channels and to design and implement a system of recruiting, training, and placing volunteers nationwide to ensure that as many seniors access the Web site as possible. AARP has made benefits outreach a number one priority of the organization and mobilized its state offices to promote BenefitsCheckUp through advertising, public relations, volunteer mobilization, and community outreach. NCOA has also enlisted several members of the National Assembly of National Voluntary Health and Social Welfare Organizations' Aging Caucus to promote use of the Organizational Edition by their local affiliates.

Joint NCOA/American Society on Aging Conference

More than 4,000 professionals attended the April 2003 Joint NCOA/American Society on Aging Annual Conference in Chicago and the 2002 conference in Denver where attendees could take advantage of some 800 sessions and pre-conference seminars. NCOA sponsored cutting-edge preconference intensive programs including a focus on older workers, "The Future is Now! Positioning Today for Tomorrow's Mature Workforce," and senior centers, "21st Century Senior Centers." Since joining forces with ASA, the annual conference continues to provide a unique blend of education, entertainment, and networking for the field of aging.

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