

93d Congress }
1st Session }

JOINT COMMITTEE PRINT

**POST-WHITE HOUSE CONFERENCE ON
AGING REPORTS, 1973**

TOWARDS A NEW ATTITUDE ON AGING—APRIL 1973

**A Report on the Administration's continuing response to the
recommendations of the Delegates to the 1971 White
House Conference on Aging**

TOGETHER WITH

**FINAL REPORT OF THE POST-CONFERENCE BOARD
OF THE 1971 WHITE HOUSE CONFERENCE ON
AGING—JUNE 1973**

PREPARED FOR THE

SUBCOMMITTEE ON AGING

OF THE

**COMMITTEE ON LABOR AND
PUBLIC WELFARE**

AND THE

**SPECIAL COMMITTEE ON AGING
UNITED STATES SENATE**

SEPTEMBER 1973



Printed for the use of the Committee on Labor and Public Welfare
and the Special Committee on Aging

POST-WHITE HOUSE CONFERENCE ON AGING REPORTS, 1973

TOWARDS A NEW ATTITUDE ON AGING—APRIL 1973

A Report on the Administration's continuing response to the
recommendations of the Delegates to the 1971 White
House Conference on Aging

TOGETHER WITH

FINAL REPORT OF THE POST-CONFERENCE BOARD
OF THE 1971 WHITE HOUSE CONFERENCE ON
AGING—JUNE 1973

PREPARED FOR THE

SUBCOMMITTEE ON AGING

OF THE

COMMITTEE ON LABOR AND
PUBLIC WELFARE

AND THE

SPECIAL COMMITTEE ON AGING
UNITED STATES SENATE

SEPTEMBER 1973



Printed for the use of the Committee on Labor and Public Welfare
and the Special Committee on Aging

U.S. GOVERNMENT PRINTING OFFICE

97-880 O

WASHINGTON : 1973

COMMITTEE ON LABOR AND PUBLIC WELFARE

HARRISON A. WILLIAMS, Jr., New Jersey, *Chairman*

JENNINGS RANDOLPH, West Virginia
CLAIBORNE PELL, Rhode Island
EDWARD M. KENNEDY, Massachusetts
GAYLORD NELSON, Wisconsin
WALTER F. MONDALE, Minnesota
THOMAS F. EAGLETON, Missouri
ALAN CRANSTON, California
HAROLD E. HUGHES, Iowa
WILLIAM D. HATHAWAY, Maine

JACOB K. JAVITS, New York
PETER H. DOMINICK, Colorado
RICHARD S. SCHWEIKER, Pennsylvania
ROBERT TAFT, Jr., Ohio
J. GLENN BEALL, Jr., Maryland
ROBERT T. STAFFORD, Vermont

STEWART E. MCCLURE, *Chief Clerk*
ROBERT E. NAGLE, *General Counsel*
ROY H. MILLENSON, *Minority Chief Clerk*
EUGENE MITTELMAN, *Minority Counsel*

SUBCOMMITTEE ON AGING

THOMAS F. EAGLETON, Missouri, *Chairman*

ALAN CRANSTON, California
EDWARD M. KENNEDY, Massachusetts
JENNINGS RANDOLPH, West Virginia
HARRISON A. WILLIAMS, Jr., New Jersey
HAROLD E. HUGHES, Iowa
CLAIBORNE PELL, Rhode Island

J. GLENN BEALL, Jr., Maryland
RICHARD S. SCHWEIKER, Pennsylvania
ROBERT TAFT, Jr., Ohio
ROBERT T. STAFFORD, Vermont

JAMES J. MURPHY, *Counsel*
MICHAEL S. GORDON, *Minority Counsel*

SPECIAL COMMITTEE ON AGING

FRANK CHURCH, Idaho, *Chairman*

HARRISON A. WILLIAMS, Jr., New Jersey
ALAN BIBLE, Nevada
JENNINGS RANDOLPH, West Virginia
EDMUND S. MUSKIE, Maine
FRANK E. MOSS, Utah
EDWARD M. KENNEDY, Massachusetts
WALTER F. MONDALE, Minnesota
VANCE HARTKE, Indiana
CLAIBORNE PELL, Rhode Island
THOMAS F. EAGLETON, Missouri
JOHN V. TUNNEY, California
LAWTON CHILES, Florida

HIRAM L. FONG, Hawaii
CLIFFORD P. HANSEN, Wyoming
EDWARD J. GURNEY, Florida
WILLIAM B. SAXBE, Ohio
EDWARD W. BROOKE, Massachusetts
CHARLES H. PERCY, Illinois
ROBERT T. STAFFORD, Vermont
J. GLENN BEALL, Jr., Maryland
PETE V. DOMENICI, New Mexico

WILLIAM E. ORIOL, *Staff Director*
DAVID A. AFFELDT, *Chief Counsel*
VAL J. HALAMANDARIS, *Associate Counsel*
JOHN GUY MILLER, *Minority Staff Director*

PREFACE

It is only natural for an Administration to want to put its best foot forward when it describes its response to a White House Conference.

The following report, "Towards a New Attitude on Aging," does just that. It provides a lengthy analysis of what the Administration claims it has done since the 1971 White House Conference on Aging and what it now stands prepared to do.

On that point—what the Administration now stands prepared to do—the report is significant because it apparently represents official policy which has been cleared by the Office of Management and Budget. Thus, there is little reason to expect to challenge the proposals made here, unless of course fundamental budgetary policy changes occur.

The report is therefore useful as a checklist of Administration intent, but we feel it necessary to observe that the Administration statement should be read with some care and caution. We must point out that the authors of this report identify some actions that were initiated by the Congress and enacted, very often, in the face of vigorous Administration opposition. Included in this category are increases in Social Security benefits, public service employment programs for older persons, establishment of a national nutritional program for the elderly, and others.

Fortunately, the Administration report is accompanied by an analysis prepared by study panels of the Post-Conference Board of the White House Conference on Aging. The Board has made available helpful supplementary information which, on occasion, challenges Administration goals or the Administration version of past history.

We believe that the two documents comprise a useful working tool for those interested in the well-being of older Americans, and we are pleased to publish this report as a part of our continuing policy of publishing and disseminating documents of general interest in the field of aging.

THOMAS F. EAGLETON,
Chairman, Subcommittee on Aging.

HARRISON A. WILLIAMS, JR.,
Chairman, Committee on Labor and Public Welfare.

FRANK CHURCH,
Chairman, Special Committee on Aging.

CONTENTS

Preface.....		Page III
--------------	--	-------------

PART 1

TOWARDS A NEW ATTITUDE ON AGING—APRIL 1973

Contents.....		5
Introduction.....		8

	<i>Summary of conference recommendations</i>	<i>Adminis- tration response</i>
I. Assuring an Adequate Income:		
A. Setting income goals.....	21	21
B. Providing adequate basic income:		
1. Public programs.....	26	27
2. Private pensions.....	28	29
3. Employment income.....	30	31
C. Reducing income drains:		
1. Property taxes.....	32	33
2. Health care payments.....	34	35
D. Increasing income for special groups.....	40	41
II. Assuring Appropriate Living Arrangements:		
A. Housing:		
1. Developing elderly housing.....	44	45
2. Choices in elderly housing.....	49	50
3. Housing design and standards.....	51	52
4. Relocation and preservation of neighborhoods.....	53	54
5. Eligibility for public assisted housing.....	54	55
B. Nursing homes:		
1. Quality.....	56	57
2. Funding.....	61	62
III. Assuring Independence and Dignity:		
A. Services to maintain independence.....	65	65
B. Preparation for retirement.....	71	71
C. Flexible retirement age.....	72	72
D. Opportunities for involvement.....	73	76
E. Educational opportunities.....	83	84
F. Transportation:		
1. Providing mobility.....	86	88
2. Licensing and insuring.....	91	91
G. Senior centers.....	92	93
H. Consumer protection.....	93	95
I. Legal protection.....	98	100
J. Information and referral.....	104	104
K. Mental health.....	105	106
L. Nutritional assistance.....	108	108
IV. Assuring Institutional Responsiveness and a New Attitude Towards Aging:		
A. Executive branch of the Federal Government: central units.....	115	116
B. Strengthening planning and coordination of aging programs.....	118	121
C. Relationship of Government to Non-Government.....	123	125
D. Reorganization for better delivery of health care services.....	128	128

VI

IV. Assuring Institutional Responsiveness and a New Attitude Towards Aging—Continued	<i>Summary of conference recommendations</i>	<i>Admini- stration response</i>
E. Organizing to meet the needs of special groups.....	129	131
F. Research and training.....	137	140
G. A new attitude toward aging.....	153	154
H. Conference followup.....	156	156
Appendix: Special Message on Aging.....		159
Topical Index to Conference Recommendations.....		183

PART 2

Final Report of the Post-Conference Board of the 1971 White House Conference on Aging—June 1973

Table of Contents.....	Page
Introduction.....	205
	207

PART A: STUDY PANEL RESPONSES

Index to recommendations.....	211
Study panel responses:	
Education.....	217
I.....	218
II.....	220
III.....	221
IV.....	223
V.....	224
VI.....	226
VII.....	228
VIII.....	230
IX.....	231
X.....	233
XI.....	234
XII.....	235
XIII.....	237
XIV.....	235
XV.....	238
XVI.....	239
XVII.....	240
XVIII.....	241
XIX.....	242
XX.....	244
XXI.....	246
XXII.....	247
XXIII.....	248
Employment and retirement.....	251
I.....	253
II.....	255
III.....	257
IV.....	259
V.....	261
VI.....	264
VII.....	266
VIII.....	267
IX.....	268
X.....	270
XI.....	271
XII.....	272
XIII.....	273
XIV.....	274
XV.....	275
XVI.....	276
XVII.....	277

VII

Study panel responses—Continued

Facilities, programs, and services

	Page
I	281
II	282
III	285
IV	287
V	289
VI	290
VII	292
VIII	295
IX	297
X	298
XI	300
XII	301
XIII	303
XIV	306
XV	308
XVI	309
XVII	311
XVIII	313
XIX	314
XX	315
XXI	316
XXII	317
XXIII	318
XXIV	321
XXV	322
XXVI	324
XXVII	326
XXVIII	328
XXIX	329
Housing	331
I	335
II	337
III	338
IV	339
V	340
VI	341
VII	342
VIII	343
IX	344
X	344
XI	345
XII	347
XIII	348
XIV	349
XV	350
XVI	351
XVII	352
XVIII	353
XIX	354
XX	355
XXI	357
XXII	358
XXIII	359
XXIV	360
XXV	361
Income	362
I	363
II	369
III	370
IV	374
V	377
	378
	379

VIII

Study panel responses—Continued

	Page
Income—Continued	
VI	380
VII	381
VIII	382
IX	385
X	387
XI	391
XII	392
Nutrition	393
I	397
II	401
III	403
IV	405
V	408
VI	413
Physical and mental health	417
I	418
II	421
III	423
IV	427
V	429
VI	431
VII	434
VIII	435
IX	436
Explanatory Note	438
X	439
XI	440
XII	443
XIII	444
XIV	446
XV	447
XVI	448
XVII	449
Planning and Government—Non-Government organizations	453
	Planning
I	454
II	456
III	459
IV	464
V	459
VI	465
VII	467
VIII	468
IX	470
X	470
XI	474
XII	475
	Non-Government
I	476
II	478
III	480
IV	481
V	482
VI	483
VII	484
VIII	485
IX	487
X	488
XI	489
XII	490

IX

Study panel responses—Continued
Research and training.....Page
493

Research

I.....	495
II.....	497
III.....	499
IV.....	501
V.....	502
VI.....	503
VII.....	504
VIII.....	505

Training

I.....	506
II.....	512
III.....	514
IV.....	515
V.....	516
VI.....	517
VII.....	517
VIII.....	518
IX.....	519
X.....	520
XI.....	521
XII.....	522

Concluding statement.....

522

Retirement roles and activities.....

523

I.....	527
II.....	528
III.....	533
IV.....	536
V.....	539
VI.....	542
VII.....	544
VIII.....	545
IX.....	546
X.....	547
XI.....	548
XII.....	549
XIII.....	550
XIV.....	551
XV.....	552

Spiritual well-being.....

553

I.....	557
II.....	558
III.....	559
IV.....	559
V.....	561
VI.....	563
VII.....	564
VIII.....	566
IX.....	568
X.....	569
XI.....	570
XII.....	571
XIII.....	572
XIV.....	574
XV.....	575
	576

Study panel responses—Continued	Page
Transportation.....	581
I.....	582
II.....	584
III.....	585
IV.....	586
V.....	587
VI.....	588
VII.....	589
VIII.....	590
IX.....	591
X.....	592
XI.....	593
XII.....	594
XIII.....	595
XIV.....	596
XV.....	597
XVI.....	598
XVII.....	599
XVIII.....	600
XIX.....	601
XX.....	602
XXI.....	603
XXII.....	605
Aging and rehabilitation.....	609
<i>Aging and blindness recommendations and responses</i>	
I.....	612
II.....	613
III.....	614
IV.....	615
V.....	616
<i>Physical and vocational rehabilitation of older people and recommendations and responses</i>	
I.....	617
II.....	619
III.....	621
IV.....	625
V.....	626
VI.....	627
Study panel response on aging and deafness.....	628
Appendix 1: Study panel rosters.....	631
Appendix 2: Report of congressional action.....	637
PART B: STATE AND PRIVATE SECTOR RESPONSE	
Table of contents to part B.....	665
Preface to part B.....	666
State action since White House Conference.....	667
Section 1: State legislation.....	671
Section 2: State administrative agencies.....	703
Strategies for possible action at State and local levels.....	799
Report of activities by national organizations and other private sector groups.....	831

PART 1

TOWARDS A
NEW ATTITUDE
ON AGING

A REPORT ON THE ADMINISTRATION'S
CONTINUING RESPONSE TO THE
RECOMMENDATIONS OF THE
DELEGATES TO THE 1971 WHITE HOUSE
CONFERENCE ON AGING

APRIL, 1973



THE SECRETARY OF HEALTH, EDUCATION, AND WELFARE
WASHINGTON, D. C. 20201

Honorable Carl Albert
Speaker of the House of Representatives
Washington, D. C. 20515

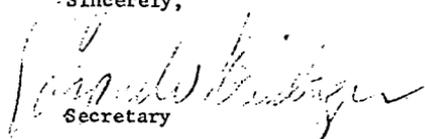
Dear Mr. Speaker:

I am transmitting to you, in accordance with Public Law 90-526, the attached report, "Toward a New Attitude on Aging: A Report on the Administration's Continuing Response to the Recommendations of the Delegates to the 1971 White House Conference on Aging."

The report identifies new actions and commitments designed to meet the needs of older Americans in response to the recommendations of the 1971 White House Conference on Aging. In addition, the report incorporates actions the President enunciated at the concluding session of the White House Conference on Aging and in his Message on Aging sent to the Congress on March 23, 1972. The report also identifies areas where conclusions have not been reached but where explorations are underway designed to facilitate the decision-making process.

The President told the delegates at the final session of the Conference, "I do not want the volumes--and there will be volumes on this Conference--simply to gather dust in the Library of Congress or in the Office of the President..." I believe this report reflects the President's continuing dedication to that pledge.

Sincerely,


Secretary

Enclosure

TABLE OF CONTENTS

	<u>Page</u>	
	<u>Summary of Conference Recommendations</u>	<u>Administration Response</u>
Introduction		
I. ASSURING AN ADEQUATE INCOME		
A. Setting Income Goals.....	1	1
B. Providing Adequate Basic Income		
1. Public Programs.....	6	7
2. Private Pensions.....	8	9
3. Employment Income.....	10	11
C. Reducing Income Drains		
1. Property Taxes.....	12	13
2. Health Care Payments.....	14	15
D. Increasing Income for Special Groups.....	20	21
II. ASSURING APPROPRIATE LIVING ARRANGEMENTS		
A. Housing		
1. Developing Elderly Housing....	24	25
2. Choices in Elderly Housing....	29	30
3. Housing Design and Standards..	31	32
4. Relocation and Preservation of Neighborhoods.....	33	34
5. Eligibility for Public Assisted Housing.....	34	35
B. Nursing Homes		
1. Quality.....	36	37
2. Funding.....	41	42
III. ASSURING INDEPENDENCE AND DIGNITY		
A. Services to Maintain Independence.	45	45
B. Preparation for Retirement.....	51	51
C. Flexible Retirement Age.....	52	52
D. Opportunities for Involvement....	53	56
E. Educational Opportunities.....	63	64
F. Transportation		
1. Providing Mobility.....	66	68
2. Licensing and Insuring.....	71	71
G. Senior Centers.....	72	73

Table of Contents (Cont'd)

	<u>Page</u>	
	<u>Summary of Conference Recommendations</u>	<u>Administration Response</u>
H. Consumer Protection	73	75
I. Legal Protection.....	78	80
J. Information and Referral.....	84	84
K. Mental Health.....	85	86
L. Nutritional Assistance.....	88	88
 IV. ASSURING INSTITUTIONAL RESPONSIVENESS AND A NEW ATTITUDE TOWARDS AGING		
A. Executive Branch of the Federal Government: Central Units.....	95	96
B. Strengthening Planning and Coordination of Aging Programs...	98	101
C. Relationship of Government to Non-Government.....	103	105
D. Reorganization for Better Delivery of Health Care Services.....	108	108
E. Organizing to Meet the Needs of Special Groups.....	109	111
F. Research and Training.....	117	120
G. A New Attitude Toward Aging.....	133	134
H. Conference Follow-up.....	136	136
 APPENDIX: SPECIAL MESSAGE ON AGING.....		139
 TOPICAL INDEX TO CONFERENCE RECOMMENDATIONS.....		163

INTRODUCTION

When President Nixon addressed the delegates to the White House Conference he noted the characteristic remnants of prior conferences--stacks of volumes gathering dust. The President said, "I do not want the volumes--and there will be volumes on this Conference--simply to gather dust in the Library of Congress or in the Office of the President..."

Responding to the findings and recommendations of the delegates to the White House Conference is a continuous process. The process was started by the President when he addressed the delegates at the concluding session of the Conference. It was continued when the President sent a Message on Aging to the Congress on March 23, 1972 in which he articulated a comprehensive strategy to meet the needs of older Americans and transmitted recommendations for action.

This report, "Towards a New Attitude on Aging," is the third step in this continuous process. In addition to identifying new actions and commitments that will lead to actions, the report incorporates some of the responses incorporated in the earlier documents. The report also identifies areas where conclusions have not been reached but where explorations are underway designed to facilitate the decision-making process.

The report should be read in the light of the following two paragraphs, which appear in the President's 1974 Budget Message under the heading of "Meeting Human Needs":

"The 1974 budget for human resources programs, like the three that have preceded it under this Administration, reflects my conviction that social compassion is demonstrated not just by the commitment of public funds in hope of meeting a need, but by the tangible betterments those funds produce in the lives of our people. My drive for basic reforms that will improve the Federal Government's performance will continue in the coming fiscal year.

Between 1969 and 1974, outlays for Federal human resources programs have increased 97%, while total budget outlays have grown by only 46%. As a result, human resources spending now accounts for close to half the total budget dollar, compared with just over one-third of the total at the time I took office."

The report is built around the four major goals of the President's strategy:

- assuring an adequate income,
- assuring appropriate living arrangements,
- assuring independence and dignity, and
- assuring institutional responsiveness and a new attitude toward aging.

In each instance a summary is provided of the Conference recommendations (which are provided in detail in another volume), and the Administration's responses to the recommendations.

The report makes clear that the cumulative impact of a series of actions by both the legislative and executive branches of the Federal government has established a momentum which is moving the Nation toward the four major goals. Differences between positions taken by the delegates to the White House Conference and the Administration are differences, in most instances, relative to the acceleration of the momentum rather than over the desirability of achieving the goals toward which the momentum is directed.

Assuring an Adequate Income

The report, which reflects the President's conviction that the best way to help older persons is by "providing them money so that they can secure needed services themselves," identifies the following actions which have contributed to significant momentum in the income area:

- The passage of the Social Security benefits increases of January, 1970, January, 1971, and September, 1972, plus the changes incorporated in H.R. 1 (P.L. 92-603) mean that the annual income of older persons from these sources will be \$14.5 billion more in the calendar year 1973 than it would have been if the increases had not been voted.
- Social Security benefits have been made inflation-proof.
- Widows and widowers are now entitled to 100% of the benefits that were paid to their deceased spouse.
- A Federal-financed floor has been placed under the income of the elderly. This is the first time in the Nation's history that provision has been made for a national income floor for any segment of the population. This provision alone makes H.R. 1 (P.L. 92-603) the most significant piece of Federal legislation in the income area since the Social Security Act of 1935.
- A major liberalization in the retirement test assures a social security beneficiary that the more he earns the more spendable income he will have.
- Medicare protection has been extended to the disabled under age 65 who have been receiving Social Security disability benefits for twenty-four months or longer.
- Medicare beneficiaries will be able to choose to have their covered health care provided through a Health Maintenance Organization (a prepaid group health or other capitation plan that meets prescribed standards).

- Controls on the health service industry which were established under Phase II of the Economic Stabilization Program will be retained and strengthened under Phase III.

In the area of assuring an adequate income the report also includes the following commitments on the part of the Administration--commitments which have or will lead to significant action:

- An interagency task force of the Human Resources Committee of the Domestic Council will be established to come to grips with the issue of developing a definition of "adequate" income for older persons.
- Older Americans should receive a fair share of the benefits which will accrue to our society as a result of increased productivity.
- The President will submit to the Congress a program for strengthening and encouraging the growth of the private retirement system and protecting the pension rights of workers from loss caused by changing jobs or mismanagement of pension funds.
- The President has stated that he "will submit to the Congress recommendations for alleviating the often crushing burdens which property taxes place upon many older Americans."
- The President will submit to the Congress a fiscally responsible and administratively workable national health insurance plan. In the development of the plan, consideration will be given to coverage issues which are directly applicable to the concerns expressed by the delegates to the White House Conference relative to areas not now covered by Medicare.
- Specific recommendations by minority groups relative to the income area are under study by the Social Security Administration and, when completed, the results of the study will be discussed with the representatives of these groups.

Assuring Appropriate Living Arrangements

The report identifies the following actions which have contributed to the development of significant momentum in improving living arrangements:

- Since 1969, the Federal government has approved approximately 250,000 units specifically designed for the elderly, more such units than in the entire 34-year history of the national housing program preceding 1969.
- In Fiscal Year 1972, nearly 68,000 units of subsidized housing specifically designed for the elderly were funded.

- During the Fiscal Year 1973, while a review of housing policy is underway and the level of subsidized housing starts during calendar year 1973 is expected to exceed the previous year's levels, the Federal government will continue to honor commitments already made.
- The Department of Housing and Urban Development has initiated organizational changes, including the establishment of the position of Assistant to the Secretary for Programs for the Elderly and the Handicapped, designed to insure that its programs are responsive to the needs of older persons.
- Vigorous implementation of the President's eight-point program for upgrading nursing homes will continue--an activity which has been strengthened significantly as a result of the Congressional acceptance of the President's proposal that the Federal government assume full responsibility for the costs of inspection of Medicaid nursing homes.

The President's program will be strengthened further by the issuance of regulations governing Intermediate Care Facilities under Medicaid.

- The Department of Housing and Urban Development and the Law Enforcement Assistance Administration have set up a multi-agency task force to seek ways of improving security in public housing projects.
- The Department of Housing and Urban Development is undertaking a series of experiments to evaluate a program of "housing allowances" for low and moderate income families. These experiments are testing the effect on the housing market of recipients' freedom to use their allotments for renting a house or apartment anywhere they choose.

In the area of assuring appropriate living arrangements the report also includes the following commitments on the part of the Administration--commitments which have or will lead to significant actions:

The special problems and needs of elderly persons will be given thorough consideration in connection with the major housing study now underway under the direction of the President's Counsellor for Community Development. Included, among others, in the study will be the following items on which delegates expressed concern:

- policies that will help assure that the elderly have greater access to adequate housing within their means;

- the problem faced by older persons with low incomes, including members of minority groups;
- the concept that older persons should have the opportunity of choosing the type of housing that is best suited to their needs.
- The special problems and needs of older persons will be given thorough consideration in the development of the proposed Better Communities Act which the President will submit to the Congress and in its implementation upon enactment.
- Affirmative action has been and will continue to be taken to insure that when Federally assisted projects force persons to relocate that adequate replacement units will be available before persons are displaced.
- The Administration will support the use of model project funds by the Administration on Aging, in conjunction with the Department of Housing and Urban Development, for demonstration home maintenance programs.
- The development of policies in the area of long-term care based on in-depth studies by the Office of Nursing Home Affairs of the quality of institutional care, the alternatives to institutional care, and on ongoing data collection and analysis.

Assuring Independence and Dignity
and
Institutional Responsiveness

The discussion of the above two goals is being combined in this Introduction in order to point up an Administration strategy which will be of major significance to both today's and tomorrow's older persons. This strategy calls for the coordination of programs involving the expenditures of hundreds of millions of Federal dollars in the field of aging.

The President in his Special Message on Aging stated that he was directing those agencies whose programs have a major impact on the lives of older persons to provide the Cabinet-level Committee on Aging with an identification of the amounts they plan to spend during the current fiscal year to meet the needs of the elderly. This has been done. The results are set forth in Table I on page 104 of this report. Here are the highlights:

- \$55.846 billions of the Federal government's total expenditures will be in the field of aging (older persons 65 and over)
- \$45.604 billions of the expenditures in aging will take place as a result of trust fund financing
- \$10.242 billions of the expenditures in aging will take place as a result of general revenue financing
- \$1.832 billions of expenditures in aging from general revenues will be made in order to support housing and service programs for older persons.

These figures do not take into consideration the extent to which 38,000 State and local governmental units may use some of the new Federal dollars made available to them under General Revenue Sharing to initiate or strengthen programs in the field of aging. Under the law one of the eight priority areas for which local governments can use these funds, if they take affirmative action to do so, is "social services for the poor or aged."

In the light of the magnitude and wide range of the Federal resources for services for older persons, and in accordance with his basic strategy, the President has directed that "an intense new effort to develop coordinated services be undertaken." He wants to make sure that those large sums are spent in such a manner as to be of maximum benefit to older persons.

The report identifies and discusses the following actions which have been taken in order to move toward the goal of assuring older persons independence and dignity:

- In conformity with its decision to work with States, local communities and the private sector in a new effort to bring into existence comprehensive service programs for older persons at the community level, the Administration has taken, among others, the following actions:
 - The President has submitted to the Congress proposals for strengthening and expanding service delivery programs under the Older Americans Act.
 - Under the Adult Services provisions of the Social Security Act the Federal Government, within a ceiling for each State related to an overall national ceiling of \$2.5 billion, will provide funds to pay 75 per cent of the cost of services that enable older individuals receiving public assistance to remain in their homes or return to their residences after hospitalization.

- Under General Revenue Sharing, Federal dollars may be used by both State and local governments, if they choose to do so, to support coordinated and comprehensive service programs for older persons.
- The Administration will encourage local communities to utilize Federal dollars that are now or will be available in such a manner as to include in comprehensive and coordinated programs at the local level services such as the following: health services through health maintenance organizations, homemaker-home health aide services, mental health services, health and medical planning, personal care following hospitalization, services for the physically and mentally handicapped, services in the field of education, transportation services, housing services, nutrition services, operation of senior centers, home repairs, home visitation, telephone reassurance services, counseling, training and placement programs for those interested in employment or in participating as volunteers in community service activities, legal services, and information and referral services.
- A National Health Service Corps has been established which, in addition to other responsibilities, can demonstrate the feasibility of providing health services to the elderly in many inner city and remote rural areas lacking professional medical assistance.
- The Administration has spearheaded a national voluntary effort to implement programs designed to help older men and women in 300 communities live dignified lives in the familiar settings of their own homes.
- The Department of Housing and Urban Development is funding demonstration programs to improve tenant services provided by local communities to residents in public housing including the elderly.
- In light of its conviction that opportunities for employment and voluntary service in all sectors of society must be made available to older Americans, the Administration has taken, among others, the following actions:

- The President has sent a directive to the heads of all Federal departments and agencies stating that age shall be no bar to a Federal job which an individual is otherwise qualified to perform.
- In Fiscal Year 1973, money for manpower programs for older workers was doubled.
- The President has directed the Department of Labor to work with the Public Employment Service to open job opportunities, including part-time job opportunities for those 65 and over, both in the public and private sectors.
- The Administration supports the use of model project funds by the Administration on Aging, in conjunction with the Department of Labor, for the development of employment services for older persons.
- Volunteer programs for older persons have been markedly expanded, including a doubling of funds for the Foster Grandparents program, and a tripling of funds for the Retired Seniors Volunteer Program. The elderly are also a central part of the large volunteer group participating in the Veterans Administration medical programs.
- In the light of its belief that educational opportunities for older persons should be included in community level comprehensive and coordinated service programs for older persons, the Administration has taken the following actions:
 - Guidelines furnished the States under the Older Americans Act will provide that due consideration be given to educational services in the planning of service programs.
 - The Administration will support the use of Administration on Aging model project funds to inaugurate, in conjunction with the Office of Education, demonstration projects designed to establish education services for older persons.
 - The Administration will pursue a policy of encouraging States, local school districts and institutions of higher learning, where appropriate, to use a larger proportion of Federal funds allocated to them, including vocational and adult education funds, to provide older persons with educational opportunities.
 - The Veterans Administration is actively engaged in educational programs benefiting elderly veterans.

- Consistent with its belief that a high priority should be given to developing access to transportation for older persons, the Administration has taken, among others, the following actions:
 - The President has directed that all Federal grants which provide services for older persons also insure that the transportation needed to take advantage of these services is available.
 - The Secretary of Health, Education, and Welfare has directed that guidelines be developed to assure that transportation is included in the State plans that will be developed under the amendments to the Older Americans Act.
 - The Department of Transportation has issued guidelines for applicants for grants under the Urban Mass Transportation program which require that the transit plan submitted with applications include consideration of the service needs of older persons.
 - The Administration is ready to give priority consideration to community requests for helping to deal with the transportation problems of older persons through capital grants from the Urban Mass Transportation Fund.
 - The Administration supports the use of Administration on Aging model project funds for the development of methods and programs, in conjunction with the Department of Transportation, to increase the mobility of older persons.
 - The President has recommended that funds now in the Highway Trust Fund be used by States and localities to expand resources in the mass transportation area--a step that could result in the provision of greater mobility for older persons.
- The Office of Consumer Affairs has taken significant actions designed to deal with the unique problems of older persons in the area of consumer protection and education.
- Consideration will be given to the unique needs of older persons in formulating a legislative proposal to establish a legal services corporation.

- The President has directed the Social Security Administration field offices to expand their information and referral services for older persons.
- The President has included in his 1974 budget \$100 million to implement the Nutritional Program for the Elderly which is authorized under the Older Americans Act.

The report identifies and discusses the President's commitment to an "intense new effort to develop coordinated services" directed toward the goal of assuring older persons independence and dignity. This commitment will result, among others, in the following moves:

- An interagency task force will develop, in response to the President's directive, plans for coordinating the use of Federal resources in the field of aging (see Table I on page 104 of the report).
- The heads of departments and agencies that have programs in the field of aging will designate persons to coordinate their programs for older persons with the understanding that the persons so designated will report to the Secretary or agency head on such matters.
- Each Federal Regional Council has or will establish a committee on aging in order to accelerate the development of comprehensive and coordinated programs for the delivery of services to older persons at the community level.
- The Administration on Aging will provide information concerning proposed Federal expenditures in aging to the States so that it can be utilized in State and local planning; and States will be provided with the opportunity of transmitting their views on proposed Federal programs.
- The Administration is committed to a sharpening up of the Federal government's objectives in the area of research in aging and then, in response to a Presidential directive, coordinating and focusing Federal resources on the achievement of these objectives.
- The Administration will provide a focal point within the Federal governmental structure to assist those colleges and universities that have made or will make a commitment to the field of aging to relate to Federal policies (1) for providing financial assistance for students in higher education, (2) for providing central coordination for programs of research in aging, and (3) for using Federal dollars to encourage the development of comprehensive and coordinated service programs for older persons at the community level.

- The views of voluntary agencies will be solicited in the establishment of comprehensive and coordinated systems for the delivery of social and nutritional services.
- The Administration on Aging will require state planning groups on aging to include representatives of minority groups on their advisory bodies.

The coordination of existing Federal resources in the field of aging will be pursued with vigor and determination. In view of the large sums of money that are involved, the impact of such an effort will constitute a truly significant response to many of the recommendations of the delegates to the White House Conference on Aging. The President is determined to use the powers of the Presidency in such a manner as to bring about such a result.

It is clear that this report cannot properly be viewed as the end of the process. The work must--and will--go on. It must go on in order, as the President has urged, "to make ours a time of which can be said, 'the glory of the present age is that in it men and women can grow old'--and can do so with grace and pride and dignity, honored and useful citizens of the land they did so much to build."

CHAPTER I:
ASSURING AN ADEQUATE INCOME

SETTING INCOME
GOALS

Summary of Conference Recommendations: The question of an adequate level of retirement income was a paramount concern of a large number of delegates. Two Sections and four Special Concerns Sessions, in proposing a level for an adequate floor of income, agreed with the Income Section which recommended as the minimum standard, the "intermediate" budget for an elderly couple as defined annually by the Bureau of Labor Statistics (BLS). The Section proposed 75 percent of the couple's budget as the minimum standard for a single person. The Aging and Aged Blacks Special Concerns Session recommended a higher standard. The Poor Elderly Concerns Session set as an eventual goal an income floor at the "comfortable" level as established by the BLS.

Several groups set no dollar level, recommending only the establishment of a guaranteed annual income for the elderly. The Nutrition Section coupled its income proposal (BLS intermediate budget as the minimum) with a recommendation for increasing the levels of existing food programs.

A second concern related to income adequacy was reflected by several recommendations that social security benefit levels carry automatic cost of living increases to insure that payments keep up with rising living costs. The Income Section added that adjustments of income level should also include increases on the basis of rising national standards of living.

Administration Response: The Administration is firmly committed to insuring an adequate income for older Americans. This commitment is based on the President's conviction that "the best way to help people in need is not by having Government provide them with a vast array of bureaucratic services, but by providing them money so that they can secure needed services themselves."

While the Administration does not believe that the Nation should settle for the status quo, it does believe that important steps have been taken recently with respect to the area of income for older persons.

The Administration does not concur in the recommendations of the delegates to the Conference that the "intermediate" budget developed by the Bureau of Labor Statistics become the national goal in this area. This budget is only one of three patterns, namely, lower, intermediate and higher, which are illustrative of the way elderly couples could spend their incomes. In developing the three family budget groupings, the Bureau of Labor Statistics studies assume that the elderly couple has the following characteristics: a husband and wife, both age 65 or over, living in their own home, both in reasonably good

SETTING INCOME
GOALS
(Cont'd)

health, and able to take care of themselves. They assume further that a couple with a lower budget relies more heavily on public transportation and free recreational facilities in the community than a family with an intermediate or higher budget. These assumptions permit the Bureau of Labor Statistics to make statistical estimates but do not mirror the actual circumstances of a large number of the elderly.

Therefore, while these studies are interesting and useful in their own right, they provide no basis for knowing whether any particular level of income is "adequate" under varying sets of circumstances.

It is clear from this analysis that further work is required before a satisfactory definition of "adequate" income can be developed. The Department of Health, Education, and Welfare has initiated studies which will be utilized by an interagency task force of the Human Resources Committee of the Domestic Council that will be established immediately to come to grips with this issue.

As we move toward the goal of an adequate income for older Americans, we must endeavor to make sure that older Americans receive a fair share of the benefits which will accrue to our society as a result of increased productivity.

The Summary below identifies the steps that have been taken or recommended in recent years in the income area.

- o Provision has been made for a national income floor for older persons -- an action which the President first recommended to the Congress in 1969.

The Social Security Amendments of 1972 include provisions which will replace the present Old Age Assistance program with a Federally financed program of Supplemental Security Income which will provide a guaranteed minimum monthly income of \$130 for an individual and \$195 a month for a couple. It will dedicate approximately \$2.4 billion of general revenue to assisting those whose income is now below the poverty line. The program, which will benefit an estimated 4.6 million older persons, as contrasted with the 2.13 million who are now under Old Age Assistance, will be administered by the Social Security Administration. (See pages 7, 8 for a detailed description of the program.)

- o Incomes of older persons have been dramatically increased over a three-year period through existing income assistance programs.

By the end of 1972, three major Social Security increases have taken effect since January 1970. Benefit payments as of the end of 1973 will be some \$25 billion more than they were at the end of 1969. The compound effect of the 15, 10, and 20 percent increases approved during this Administration

SETTING INCOME
GOALS (Cont'd)

is a 51.8 percent increase since 1969, representing the greatest rate of increases in Social Security since 1950.

As the President said in his July 1, 1972 statement approving the latest increase, older Americans "both need and deserve a significant increase in Social Security benefits ... It is in consideration of their just requirements ... that I have signed H.R. 15390."

These increases mean that the average annual Social Security benefit for an individual will be nearly \$1,900; for a couple it will be \$3,276. Today, a 65 year old covered retiree -- who during his working years was at the top of the Social Security wage base -- will receive an annual income of \$3,193; for a couple it will be \$4,790. These represent substantial increases over the benefits being paid four years ago. Through these increases, older Americans have shared significantly in the rising national standard of living.

Besides the improvements in Social Security benefits, progress has also been made in improving the income position of retired military pensioned veterans, and retired Federal employees. Retirement benefits of Federal employees have been liberalized and have increased over 26 percent in the last 4 years. For veterans on pensions, increases averaging 16 percent have gone into effect since January 1971. This Administration is also seeking to improve military retirement benefits by re-computing retirement pay, as the retiree reaches normal retirement age, on the basis of January 1971 pay scales.

The compensation and pension programs of the Veterans Administration have a major impact on the economic status of a significant number of the elderly. It is estimated that more than \$2.2 billion will be paid to older veterans and their widows and dependents in 1973. Of this, more than \$1.013 billion will be paid as pensions to older veterans, \$514 million as pensions to widows and children of older veterans, and more than \$364 million as compensation for service incurred disability to older veterans.

- o On July 1, 1972 the President signed legislation to make Social Security benefits "inflation proof" through a cost-of-living escalator.

It is not enough to make periodic changes in benefits to make up for previously inadequate income levels. One of the greatest problems of

SETTING INCOME
GOALS
(Cont'd)

retired couples is that their incomes have been relatively fixed and have failed to keep up with increased living costs.

In the legislation President Nixon submitted to Congress in September 1969, he asked that Social Security payments, for the first time, be automatically protected against inflation. Whenever the Consumer Price Index increased by 3 percent or more, benefits would be increased by an equal amount.

In his message to Congress on the elderly in March 1972, the President said, "Payments that keep pace with the cost of living would thus become a guaranteed right for older Americans -- and not something for which they have to battle again and again, year after year." Congress included this protection against inflation in the new Social Security benefits legislation that President Nixon signed into law on July 1.

In his signing statement, the President said, "This action constitutes a major breakthrough for older Americans, for it says at last that inflation-proof Social Security benefits are theirs as a matter of right, and not as something which must be temporarily won over and over again from each succeeding Congress."

- o On October 30, the President signed H.R. 1 (PL.92-603), a comprehensive Social Security bill containing the following provisions which will have a major impact on the incomes of older Americans.

- An increase in widow's and widower's benefits so that a widow or widower who first becomes entitled to benefits at or after age 65 will receive a benefit equal to 100 percent of his or her deceased spouse's primary insurance amount if the spouse did not receive reduced benefits before death. If he did receive reduced benefits, the widow's benefit can be no more than the amount the spouse would be receiving if he were still alive. (A widow who becomes entitled to benefits at or after age 62 will receive no less than 82.5 percent of the spouse's primary insurance amount.) Benefits for widows or widowers who become entitled to benefits between ages 62 and 65 will be reduced to take account of the longer period over which they are paid, just as a worker's benefit is reduced if he takes benefits before age 65. Benefits will range from 71.5 percent of the deceased spouse's primary insurance amount at age 60 to 100 percent at age 65.
- A liberalization of the earnings test to enable retired persons receiving Social Security to

SETTING INCOME
GOALS
(Cont'd)

earn more money by working without having their retirement benefits reduced. As the President has said, "Those who can work and want to work should not be discouraged from working."

Under prior law, Social Security benefits were not paid in full to people under age 72 who worked and earned more than \$1,680 (the annual exempt amount) in a year. If annual earnings exceeded \$1,680, benefits were reduced by \$1 for each \$2 of earnings between \$1,680 and \$2,880, but above \$2,880, \$1 in benefits was withheld for each \$1 of earnings. Under this provision, some older people chose not to increase their earnings because of the dollar-for-dollar reduction of benefits with respect to earnings over \$2,880.

The President has signed legislation which increases to \$2,100 the amount a Social Security beneficiary can earn in 1973 and later years without having payments reduced. This recent legislation provides that the exempt amount will be automatically increased in the future to keep pace with increases in average wages covered under Social Security. In addition, benefits will be reduced by \$1 for each \$2 earned above \$2,100 no matter how high the earnings might be so that there will be no dollar-for-dollar reduction in benefits as now occurs with respect to earnings above \$2,880. This assures that the more a Social Security beneficiary earns, the more spendable income he will have.

- A delayed retirement credit that provides for increasing a worker's old-age benefit by 1 percent for each year (1/12 of 1 percent for each month) after 1970 for which the worker between age 65 and 72 did not receive benefits because of earnings from work. No increased benefit will be paid under the provision to the worker's dependents or survivors.
- A special minimum monthly benefit equal to \$8.50 multiplied by a worker's number of years of coverage under Social Security in excess of 10 years, up to a maximum of 30 years. The highest minimum benefit under this provision will be \$170 a month for a person (\$255 for a couple) who had 30 or more years of coverage. The special minimum will be paid as an alternative to the regular benefit in cases where a higher benefit results. The special minimum will not be raised under the automatic benefit increase provisions.

SETTING INCOME o
GOALS
(Cont'd)

The Department of Agriculture has expanded the food assistance program and increased benefits available under it.

Reforms have been made in the Food Stamp and Commodity Distribution programs of the Department of Agriculture. National eligibility standards have been set for food stamp eligibility, and benefits have been increased to keep pace with the cost of living.

Since 1969, the average bonus (i.e., benefit) for an elderly couple has increased from \$91.68 to \$196.08 in 1972. The average bonus for a single elderly person has increased from \$79.56 to \$173.56 during the comparable period.

Virtually every county in the Nation now offers either the Food Stamp or the Food Distribution Program; in early 1969, nearly 500 counties offered neither. In all, 2.5 million older Americans benefit from at least one of these programs.

PROVIDING
ADEQUATE BASIC
INCOME: PUBLIC
PROGRAMS

Summary of Conference Recommendations: Some Conference delegates recommended using Federal general revenues as well as Social Security funds to support a national income floor. The Income Section proposed retaining the basic features of the Social Security system, with general revenues supplementing the employer-employee contributions to the Social Security system. The Facilities, Programs, and Services Section, the Employment and Retirement Section, and the Special Concerns Session on the Poor offered similar recommendations. The Income Section suggested that such general revenue financing could be used to lighten the burden of payroll taxes for low income workers.

The Income Section also said there should be a supplementary payment system based on an income test to bring incomes up to the level of the "intermediate" budget, financed entirely from Federal government general revenues and administered by the Social Security Administration. The Sessions on the Poor, and the Aged Blacks called for the merger of the Old Age Assistance Program into the Old Age Insurance Program. The Session on the Poor suggested this merger as one means of achieving immediate coverage by Social Security of all older persons, while the Session on the Aged Blacks looked to the merger to eliminate the stigmatizing effects associated with Old Age Assistance as well.

The Facilities, Programs and Services Section and the Aging and Blindness Session, in effect, recommended retention of the Old Age Assistance Program but urged its federalization. The Facilities, Programs and Services Section went on to recommend the abolition of

PROVIDING
ADEQUATE BASIC
INCOME: PUBLIC
PROGRAMS
(Cont'd)

restrictive features of Federal and State public assistance laws and regulations which have the effect of denying benefits and services to older persons. Actions specifically recommended included simplification of eligibility procedures and abolition of liens and relative responsibility procedures. The Sessions on Elderly Indians, the Poor Elderly, Spanish-Speaking Elderly, and Aged Blacks made similar recommendations.

The Employment Section called for a minimum monthly Old Age Insurance payment of \$150, while the Facilities, Programs, and Services Section recommended that the minimum floor of income in the Old Age Assistance Program be set at the poverty threshold.

The Sessions on the Poor, Aging and Blindness, and the Spanish-Speaking Elderly urged that Old Age Insurance increases not be deducted from Old Age Assistance grants.

Administration Response: The Administration believes that the time has come to assure an income floor for older people. On October 30, 1972, the President signed H.R. 1 (P.L. 92-603) which included provision for an income floor for older persons through a Federal Supplemental Security Income program based on need, which will supplement income from such sources as Social Security, private pensions and employment.

Approximately 85 percent of all Americans over 65 receive regular cash payments under Social Security. Ninety-three percent of those now reaching 65 are eligible to receive such benefits when they or their spouses retire.

The Social Security system is an income program that relates payments to earnings. It is a self-supporting system that is financed by payments made by the employee and the employer. The Administration believes that general revenues should be used to establish a national income floor for the elderly poor. This approach is reflected in the new Federal Supplemental Security Income program, established under the 1972 Social Security amendments, which starting in 1974, will:

- o Establish a national income floor for an estimated 4.6 million older persons. This will be an increase of approximately 2.5 million over those now covered by the Federal-State public assistance program.
- o Apply uniform national eligibility standards.

PROVIDING
ADEQUATE BASIC
INCOME: PUBLIC
PROGRAMS
(Cont'd)

- o Provide for eligibility standards which eliminate the practice of placing liens on homes and provide that eligibility will be determined without regard to the income or assets of relatives.
- o Spend \$2.4 billion a year in general revenues to assure older persons a monthly income of at least \$130 for an individual and at least \$195 for a couple.

The new Federal Supplemental Security Income program will be administered by the Social Security Administration. This will utilize the experience and expertise of the Social Security Administration and will guarantee uniform national treatment of all elderly persons on such matters as eligibility procedures and financial assets. While the new program is designed to assure older persons monthly income of at least \$130, and \$195 for couples, it also is designed to take account of the fact that the great majority of older persons have other income that results from past work -- generally Social Security benefits. In recognition of their past efforts, the program will disregard \$20 of any income per month. Thus, most older people will be assured monthly incomes of \$150 for an individual and \$215 for a couple. The new law also provides that in establishing eligibility, the first \$65 per month of earned income shall be disregarded and, likewise, a half of any earned monthly income over \$65 will be disregarded. In addition, States will be encouraged to supplement Federal payments where necessary to maintain January 1972 payment levels, even if they are higher than the Federal standards, without any additional cost to the States over and above their calendar year 1972 costs.

PROVIDING
ADEQUATE BASIC
INCOME: PRIVATE
PENSIONS

Summary of Conference Recommendations: Delegates recognized private pensions as one of the most important means for augmenting retirement income. They, therefore, urged expansion of coverage and greater Federal regulation of private pension programs and stressed the need to protect the rights of workers who leave or lose their jobs before retirement.

The Income Section framed a comprehensive recommendation for improving private pensions which encompassed those proposed by the Employment and Retirement Section and several of the Special Concerns Sessions. Specified among the requirements, suggested for inclusion in Federal law, were early vesting and/or portability, survivors benefits, and complete disclosure to beneficiaries of eligibility and benefit provisions of the plans. Stressed also was the need for assurance of fiduciary responsibility, minimum funding requirements and protection of promised benefits. In its recommendations concerning private

PROVIDING
ADEQUATE BASIC
INCOME: PRIVATE
PENSIONS
(Cont'd)

pensions, the Employment Section called for a compulsory portability system for workers usually not covered by pension plans and, to spur the growth of pension coverage, for greater tax incentives to employers and employees.

Administration Response: This Administration agrees with the views of delegates to the White House Conference on Aging that private pensions are an important source of income for the elderly and firm action must be taken to assure that private pension plans operate fairly and effectively. In his March 1972 message to Congress the President supported the view of the Conference saying, "the long range answer to adequate income for the elderly does not lie in government programs alone; it also requires expansion and reform of our private pension system."

- o The President has proposed the following five point program for strengthening and encouraging the growth of the private retirement system and protecting the pension rights of workers from loss caused by changing jobs or mismanagement of pension plan funds.

-- Tax deductions to encourage independent savings toward retirement.

Workers not covered by employer financed retirement plans would be permitted to establish their own retirement plans and make tax deductible contributions to them up to an annual limit of 20 percent of earned income or \$1500, whichever is less.

Workers covered by employer financed plans would also be permitted to make tax deductible contributions to their own retirement plans; however, their deductible amount would be reduced to reflect employer contributions made on their behalf. Individuals would also be able to defer taxation on investment earnings on contributions to their own retirement plans.

-- More generous tax deductions for pension contributions by self-employed persons.

The annual limit for deductible contributions to pension plans by the self-employed -- on their own behalf and for those who work for them -- should be raised from \$2,500 to 10 percent of earned income, whichever is less, to the lesser of \$7,500 or 15 percent of earned income.

PROVIDING
ADEQUATE BASIC
INCOME: PRIVATE
PENSIONS (Cont'd)

-- Requiring the vesting of pensions.

Older workers need pension vesting protection because they lack the opportunities of younger people to start new careers and build new sources of retirement income. If the older worker loses his job or wants to move to a new job, he can't afford to lose his accumulated pension rights; but that is what happens unless those pension rights are vested. To change this situation, the President's proposal would establish the Rule of 50 as a Federal standard under which all pensions would become 50 percent vested when an employee's age plus years of participation in a plan total 50, increasing 10 percent for each year of service thereafter until fully vested. Under this proposal, the proportion of participants in private pension plans with vested pensions would rise from 31 percent to 46 percent and among such participants aged 45 and over the increase would be from 60 percent to 92 percent.

o The Employee Benefits Protection Act.

This legislation was first proposed to the Congress in March of 1970; it was strengthened and resubmitted in 1971. It would require that pension funds be administered under strict fiduciary standards and would provide certain Federal remedies when they are not. It would also require that plans provide full information to employees and beneficiaries concerning their rights and benefits.

o A study of pension plan terminations

In his December 1971 message, the President also directed the Departments of Labor and the Treasury to undertake a study concerning the extent of benefit losses which result from the termination of private pension plans. Terminations that occurred during 1972 are now being analyzed and the study will be completed shortly.

PROVIDING
ADEQUATE BASIC
INCOME: EMPLOY-
MENT INCOME

Summary of Conference Recommendations: Conference participants were concerned with a number of matters related to income earned from post-retirement work and jobs for older workers. A major concern was the retirement earnings test whereby Social Security benefits are reduced because of income earned from work. (See "Setting Income Goals", page 1, and "Opportunities for Involvement", page 53.) A number of Conference groups recommended liberalization of the earnings test to permit Social Security beneficiaries to earn more money from work without losing retirement benefits.

PROVIDING
ADEQUATE BASIC
INCOME: EMPLOY-
MENT INCOME
(Cont'd)

A second major concern of Conference delegates was age discrimination in employment. (See "Opportunities for Involvement, page 53.) Participants urged more vigorous enforcement of anti-discrimination laws and extension of coverage of the Age Discrimination in Employment Act of 1967.

In a third job-related area, Conference delegates recommended more efforts to create jobs for elderly people through public service employment and expansion of job recruitment, training, counseling and placement services. (See "Opportunities for Involvement", page 53.)

Administration Response: The Administration fully agrees with delegates to the White House Conference on Aging that post-retirement jobs can be an important source of basic income. It is seeking to remove obstacles to jobs for older workers and to provide employment opportunities in the following ways:

- o The President has signed legislation which liberalizes the earnings test and assures Social Security beneficiaries that the more money they earn, the more spendable income they will have.

Under prior law, Social Security benefits were not paid in full to people under age 72 who worked and earned more than \$1,680 (the annual exempt amount) in a year. If annual earnings exceeded \$1,680, benefits were reduced by \$1 for each \$2 of earnings between \$1,680 and \$2,880, but above \$2,880, \$1 in benefits was withheld for each \$1 of earnings. Under this provision, some older people chose not to increase their earnings because of the dollar-for-dollar reduction of benefits with respect to earnings over \$2,880. The President has signed legislation which increases to \$2,100 the amount a Social Security beneficiary can earn in 1973 and later years without having payments reduced. This recent legislation provides that the exempt amount will be automatically increased in the future to keep pace with increases in average wages covered under Social Security. In addition, only \$1 in benefits will be withheld for each \$2 earned above \$2,100 no matter how high the earnings might be so that there will be no dollar-for-dollar reduction in benefits as now occurs with respect to earnings above \$2,880. This assures that the more a Social Security beneficiary earns, the more spendable income he will have.

- o The Administration has moved to eliminate age discrimination in employment.

The Department of Labor has launched an active program to enforce the Age Discrimination in Employment Act which applies to people who are not yet of retirement age. This enforcement action includes

PROVIDING
ADEQUATE BASIC
INCOME: EMPLOY-
MENT INCOME
(Cont'd)

court action, voluntary compliance agreements, and public information activities. The President directed the Secretary of Labor to submit legislation to extend the Age Discrimination in Employment Act to employees of State and local governments and sent a directive to the heads of all Federal departments and agencies reaffirming the policy against age discrimination in employment.

- o The Administration has taken steps to open up job opportunities for older workers in both the private and public sectors.

During Fiscal Years 1972, 1973, the President doubled funds for manpower programs for older workers. The President also directed the Secretary of Labor to urge States and communities to hire persons over 65 under the Emergency Employment Act and to encourage the State Employment Placement Offices to open up job opportunities for persons over 65 -- especially part-time job opportunities.

- o The Administration supports the use of the Administration on Aging's model project authority to conduct, in conjunction with the Department of Labor, demonstration and model programs in manpower training.

However, while the actions taken above are related to assuring an adequate income for older persons, they also relate to a continuing need to provide opportunities for older workers to remain active and involved. A more detailed response to this problem is presented in "Opportunities for Involvement: (see pages 55, 61).

REDUCING INCOME
DRAINS:
PROPERTY TAXES

Summary of Conference Recommendations: Delegates were aware that, at best, guaranteed income levels would constitute no more than a basic floor of income. They therefore sought ways of further improving the financial security of the elderly by making several recommendations that would, if implemented, reduce some of the financial burdens of older people. Among these recommendations were proposals dealing with property taxes.

The Income Section recommended that States and localities be encouraged to remit all or part of residential property taxes on housing owned or occupied by older people who qualify by virtue of income or assets. A system of Federal and State grants would compensate for reduced property tax

REDUCING INCOME
DRAINS:
PROPERTY TAXES
(Cont'd)

revenues. The Housing Section and Special Concerns Sessions on the Elderly Poor, Rural Older People, Elderly Consumers, and Spanish-Speaking Elderly also made recommendations for property tax relief.

Administration Response: The Administration firmly agrees with Conference delegates that the burden of property taxes must be eased.

The President expressed his agreement in his Special Message on Aging in March 1972:

"Two-thirds of all older citizens -- and 78 percent of older married couples -- own their own homes. For these Americans -- and for many younger Americans as well -- the heavy and growing burden of property taxes constitutes one of the most serious of all income-related problems. Even those who rent their homes often bear an unfair burden since property tax increases are frequently passed along in the form of higher rents. The reason these burdens are so onerous, of course, is that the income from which property taxes must be paid by the elderly is usually going down at the very time the taxes are going up.

"Property taxes in the United States have more than doubled in the last ten years. The problems which this fact implies are felt by Americans of all ages. But elderly Americans have a special stake in their solution."

In October 1972, the President said in a radio address to the Nation:

"One of my highest priority proposals to the new Congress will be property tax relief for older Americans."

In March 1973, the President said in the Human Resources Section of his 1973 State of the Union Message:

"I will submit to the Congress recommendations for alleviating the often crushing burdens which property taxes place upon many older Americans."

- o In response to a recommendation of the President, the Congress passed General Revenue Sharing which provides an additional opportunity to deal with the property tax issue.

REDUCING INCOME
DRAINS: HEALTH
CARE PAYMENTS

Summary of Conference Recommendations: The financing of health care was linked by several Conference groups with recommendations for expansion of health care benefits to reduce the drain on incomes of the elderly. The Income Section stated that, "This Nation can never attain a reasonable goal of income security so long as heavy and unpredictable health costs threaten incomes of the aged."

A divergent set of views developed at the Conference over the matter of financing expanded health care services and the future of Medicare and Medicaid. The majority view in the Physical and Mental Health Section was that, "A comprehensive health care plan for all persons should be legislated and financed through a National Health Plan." This group stressed, however, that until such time as a National Health Plan was implemented, the complete range of health care services should be provided by expanding the legislation and financing of Medicare. This expanded financing would come from a combination of Social Security Trust Funds and greater sums from general revenues.

Two other major portions of this broad recommendation were:

1. Expansion of Medicare should include elimination of deductibles, co-insurance and co-payment.
2. Both the immediate expansion of the current program and a future National Health Plan provide "for a public/private partnership" in the delivery of services. However, the Federal government would be responsible for assuring uniform service benefits and standards of quality.

The Income Section, which shared the majority view of the Health Section, added that national health insurance should be financed through general revenues and payroll taxes and that co-payments, deductibles, or co-insurance should not be required. Several Special Concerns Sessions also supported this position.

Within the Health Section there was a significant minority view supporting expansion of both Medicare and Medicaid (as opposed to expansion of Medicare only) to achieve a comprehensive health care plan. A Section minority report also favored eliminating private insurance carriers as intermediaries in the Medicare program, favoring the view that the Federal Government should administer the fiscal aspects of the program.

The future of Medicare and Medicaid also came up in other group discussions. The Session on the Elderly Poor proposed a merger of the two programs and establishment of a Federally administered system covering all persons 65 and older. A similar view was taken by

REDUCING INCOME
DRAINS: HEALTH
CARE PAYMENTS
(Cont'd)

the Long Term Care for Older People group. In this Session there was also a minority report expressing reservations about the suitability of Medicare as a vehicle of meeting total health care needs for the elderly.

Other groups also proposed important changes in the current financing operations of health programs for the aged. The Session on Aging and Aged Blacks recommended that health care legislation should be uniform and mandatory and not dependent upon matching State funds or voluntary participation of individual States.

The health benefits-income concern of Conference participants resulted in several proposals for financing a major expansion in health care services available to older persons. The Health Section called for coverage of a complete range of health services, but in other groups listings were made of specific benefits they felt should be covered such as out-of-hospital drugs; care for eyes, ears, teeth, and feet; alternatives to institutional care including nutrition services such as nutrition counseling; improved long-term care benefits; comprehensive mental health treatment; protection against catastrophic illness; vocational rehabilitation services; and interpreters for the deaf. The Facilities, Programs, and Services Section called for elimination of retroactive denial of benefits under Medicare.

Attention was also given to eligibility requirements for benefits. For example, delegates in the Sessions on Aging and Aged Blacks and Physical and Vocational Rehabilitation suggested including recipients of Social Security disability benefits in the Medicare program. The Health Section proposed that eligibility for benefits should be expanded by establishing congruent ages for Medicare and Social Security eligibility.

Administration Response: This Administration concurs with the recommendations of Conference delegates that the time has come for a national health insurance program.

- o This Administration vigorously supports a fiscally responsible and administratively workable national health insurance plan.

The President believes that Congress should enact a major, comprehensive program that will improve the health care of all Americans, and that will enable every citizen to get quality health care at reasonable cost regardless of income. At the same time, he believes it should not impose a stunning new financial burden on every American taxpayer that would come if we had the national government take over health care as some have proposed.

REDUCING INCOME
DRAINS: HEALTH
CARE PAYMENTS
(Cont'd)

The Administration proposed a national health insurance plan to the 92nd Congress. This plan is now under review and a new proposal will be submitted to the 93rd Congress.

* * * * *

The Administration has taken the following additional steps to enhance health programs for the elderly.

- o The President signed into law P.L. 92-603 which limits future increases in the premium for supplementary medical insurance under the Medicare program.

The Social Security Amendments of 1972, P.L. 92-603, include a provision which would partially "freeze" the Part B premium. In any given year after 1974, the premium will rise by no more than the percentage by which cash benefits have been increased across the board since the premium was last increased.

- o The Administration has urged Congress to approve a program to aid in the demonstration of Health Maintenance Organizations that would provide comprehensive health care services.

The Health Maintenance Organization concept is a method for financing and providing health care that has won growing respect. HMO's bring into a single organization the physician, the hospital, and the clinic. They are expected to prove an efficient method for providing comprehensive health service in a wide range of settings. The National Health Insurance Partnership Act proposal would give families a choice between this type of organization and the traditional fee-for-service financing.

The Social Security Amendments of 1972, P.L. 92-603, provide that Medicare beneficiaries may choose to have their covered health care provided through a Health Maintenance Organization (a pre-paid group health or other capitation plan that meets prescribed standards). Under this option the choices available to Medicare beneficiaries for securing health care services will be increased and, hopefully, by stimulating competition among various sources of health care, contribute to more efficient and economical delivery of services generally for all patients.

- o P.L. 92-603 included other provisions to extend and liberalize the Medicare program.

REDUCING INCOME
DRAINS: HEALTH
CARE PAYMENTS
(Cont'd)

This legislation contains provisions for extending Medicare protection to the disabled under age 65 who have been receiving Social Security disability benefits for 24 months or longer.

PL 92-603 will broaden the extent of post-hospital care available to older persons under Medicare. Under this legislation a single common definition of care requirements for extended care services under Medicare and skilled nursing services under Medicaid is established as follows:

Skilled nursing care provided directly by or requiring the supervision of skilled nursing personnel, or other skilled rehabilitation services which the patient needs on a daily basis, and which as a practical matter can be provided only in a skilled nursing facility on an in-patient basis.

For Medicare patients, this provision, which somewhat liberalizes the Medicare definition of care for patients entering skilled nursing home facilities following hospitalization, will broaden the coverage to two classes of patients who may not have been covered before:

- (1) The patient who needs a variety of unskilled services on a regular daily basis, if the planning and overseeing of the aggregate of the unskilled services require regular daily involvement of skilled personnel.
- (2) The patient who is in regular need of skilled rehabilitation services (other than nursing) which are essential to his recovery from an in-hospital stay or to prevent his condition from worsening, and which as a practical matter can only be provided in a skilled nursing facility.

As a consequence, some of those patients who formerly would have had to pay for this care themselves will now be entitled to medicare benefits.

This legislation also relieves beneficiaries from liability in certain situations where Medicare claims are disallowed and the beneficiary is without fault, including cases where the disallowance is based on determinations that the services were not medically necessary or did not meet level-of-care requirements. The legislation further provided

REDUCING INCOME
DRAINS: HEALTH
CARE PAYMENTS
(Cont'd)

for advance approval of post hospital extended care and home health care coverage. These provisions should substantially alleviate the hardship of retroactive denial of benefits.

In connection with the development of the National Health Insurance Plan, consideration will be given to coverage issues which are directly applicable to the concerns expressed by the Delegates, relative to areas not now covered by Medicare.

- o The Administration has proposed reform of cost sharing provisions in the Medicare program that will result in significant cost reductions for those with longer term illnesses and provide better designed incentives for appropriate utilization of medical services.

Under the Administration's proposal, the beneficiary would pay a deductible equal to the room and board charge for the first day of hospitalization and, thereafter, 10 percent of the charges incurred for hospital, extended care facilities and home health services covered under hospital insurance. The proposal would impose a limited amount of cost sharing for the 2nd to 60th day of hospitalization when over-utilization is most likely to occur, and relate an individual's co-payments to the services actually used. Cost-sharing for lengthy hospitalization would be substantially reduced, thereby providing increased protection for those with lengthy illnesses who already have high medical expenses. The cost sharing for a person hospitalized 150 days, for example, would be \$2,000 less under the Administration's proposals than under provisions of current law.

There are substantial variations in the use of services in the Medicare program that cannot be justified as medically necessary. For example, in FY 1971, hospital admissions ranged from 239 per 1,000 beneficiaries in the five states with lowest admissions to 412 per 1,000 beneficiaries in

REDUCING INCOME
DRAINS: HEALTH
CARE PAYMENTS
(Cont'a)

states with the highest admission rates. In addition, average lengths of stay for identical diagnosis and procedures averaged nearly 50 percent longer in the Northeast than in the West. Better designed cost-sharing by beneficiaries will curtail such medically inappropriate use of services. Cost-sharing as a means of controlling over-utilization is a principle widely recognized in private health insurance plans.

The Administration also proposes to raise the Supplementary Medical Insurance (SMI) deductible to \$85 and to increase the SMI co-insurance to 25 percent -- a proposal which takes account of both increases in costs of medical services and recent increases in the incomes of beneficiaries.

The Administration's cost-sharing proposals should be considered in the light of two factors. First, Social Security benefits have increased about 70 percent since the beginning of Medicare thus making it practical to establish better designed -- although still limited -- cost sharing features. Second, Medicaid is available to pay the cost sharing for the low income aged and over 50 percent of Medicare beneficiaries carry private insurance policies designed to supplement their benefits under Medicare. Sixty percent with annual incomes between \$3,000 and \$5,000, and 69 percent with annual incomes between \$5,000 and \$10,000 carry such insurance.

- o This Administration is seeking ways to curb inflationary forces that have forced health costs to increase -- thus affecting the income position of many older Americans.

The elderly, like all Americans, have also been hurt by inflation and the rapid rise in medical costs. In the period from 1960 to 1971, national health care expenditures rose from \$23 billion to \$65 billion, an increase of 187 percent. In large part, this enormous increase went not for better health care, but merely to meet price inflation.

Affirmative action has been taken to meet this problem. Research and demonstration is underway on methods and incentives to increase efficiency in medical services delivery systems.

Efforts are also being made to increase the supply of health manpower. In fiscal 1974, nearly \$1.3 billion will be spent for health manpower training and education.

Special attention is being given to halting the rise in health care costs by the Cost of Living Council.

REDUCING INCOME
DRAINS: HEALTH
CARE PAYMENTS
(Cont'd)

Under Phase II, the inflation of medical prices was reduced to about half of the annual rate of increase before the Economic Stabilization Program. As a result, medical bills for the aged in 1972 were over \$200 million less than they would have been if the 1971 inflation rate had been allowed to continue.

In the Human Resources Section of his 1973 State of the Union message, the President observed that, "to build on these gains, controls on the health services industry have been retained and will be strengthened under Phase III of the Economic Stabilization Program."

President Nixon has also called for new research efforts in fields such as heart disease and cancer -- initiatives which hold the promise of reducing health problems and health bills for older persons. Outlays for health research will increase from \$1.5 billion in 1969 to a proposed \$2.1 billion in FY 1974.

INCREASING
INCOME FOR
SPECIAL GROUPS

Summary of Conference Recommendations: Several special groups were perceived by delegates as being disadvantaged in one way or another. In order to compensate for the extraordinary circumstances of these groups, a number of recommendations were addressed to improving their financial situations.

Recommendations clustered mainly around the problems associated with minority groups. The Special Concerns Sessions on Aging and Aged Blacks and on Spanish-Speaking Elderly proposed lowering the age eligibility requirement for Social Security to reflect racial inequities in life expectancy. The Income Section, however, recommended that before any such action was taken, a study should be made to determine whether certain groups might be disadvantaged under present retirement age and benefit standards because of shorter life expectancy due to social-economic conditions or racial discrimination. The Asian American Elderly Special Concerns Session recommended that time spent by Japanese-American elderly in internment camps during World War II be credited toward full Social Security benefits.

Three additional changes in the Social Security system were proposed by the Income Section. The first called for widows' benefits to begin at age 50. The second, supported by the Special Concerns Sessions on Asian American Elderly, Spanish-Speaking Elderly, and Elderly Poor, called for extending special benefits for persons 72 years of age to residents of the Commonwealth of Puerto Rico, Samoa, the Virgin Islands, and Guam. The third, supported by the Session on Blindness, called for establishing a standard of income adequacy for the handicapped that recognizes their special expenses in old age.

INCREASING
INCOME FOR
SPECIAL GROUPS
(Cont'd)

The Facilities, Programs, and Services Section recommended that widows retain full benefits.

Administration Response: The Administration recognizes that special income problems have arisen among disadvantaged groups.

The primary emphasis of Administration policy is to work toward eliminating the root causes of these problems and increasing the health, earning potential, and longevity of those groups which have been specially disadvantaged.

- o Some of the specific recommendations made by minority groups are now being studied by the Social Security Administration as recommended by the delegates to the Income Section.

Recommendations under study include: determining whether members of certain minority groups are being disadvantaged under present retirement age and benefit standards because of shorter life expectancy; changes in age eligibility requirements for widows; and extension of special benefits for persons 72 years and over to residents of the Commonwealth of Puerto Rico, Samoa, the Virgin Islands, and Guam.

- o P.L. 92-603, enacted into law when the President signed H.R. 1, a comprehensive Social Security bill, provides for the following actions designed to improve the income of special groups identified by the Conference delegates.

- Increased widow's benefits. About 58 percent of the population age 65 and over are women, most of whom depend primarily on Social Security benefits earned by their husbands. Under prior law, however, a widow was eligible for only 82 1/2 percent of the amount her deceased husband would receive if his benefits started at or after age 65. Under P.L. 92-603, a widow (or widower) who first becomes entitled to benefits at or after age 65 will receive a benefit equal to 100 percent of her deceased husband's primary insurance amount if he did not receive reduced benefits before his death. If he did receive reduced benefits, the widow's benefit can be no more than the amount her husband would be receiving if he were still alive. (A widow who becomes entitled to benefits at or after age 62 will receive no less than 82.5 percent of her husband's primary insurance amount.) Benefits for widows (or widowers) who become entitled to benefits between ages 62 and 65 will be reduced to take account of the longer period over which they

INCREASING
INCOME FOR
SPECIAL GROUPS
(Cont'd)

are paid, just as a worker's benefit is reduced if he takes benefits before age 65. Benefits will range from 71.5 percent of the deceased husband's primary insurance amount at age 60 to 100 percent at age 65.

- Increased benefits for delayed retirement. Under present law, those who choose not to retire at age 65 forfeit their Social Security benefits for the period between the time they are 65 and the time they finally retire. P.L. 92-603 increases a worker's old-age benefit by 1 percent for each year (1/12 of 1 percent for each month) after 1970 for which the worker between age 65 and 72 does not receive benefits because of earnings from work. No increased benefit will be paid under the provision to the worker's dependents or survivors.
- Non-contributory Social Security wage credits for U.S. citizens of Japanese ancestry for the period they were interned by the U. S. Government during World War II and were aged 18 and over. These credits are intended to provide Social Security credit for such U. S. citizens because they were unable to work and earn Social Security credit during their internment during World War II.
- An income floor of at least \$130 per month for an older individual and at least \$195 per month for an older couple under the new Federal Supplemental Security Income program which will start in 1974 and be paid out of general revenues. (See pp. 7,8).
- o The Veterans Administration is pursuing a policy of income maintenance through its Compensation and Pension Programs of particular interest to the aged blind, deaf and disabled.

The Veterans Administration has constituted a major source of monetary support to the aged blind, deaf, and disabled veterans for the last fifty years. Cost of living increases over that time have been recognized by Congressional action raising benefit payments periodically.

- Total cases of all ages receiving pension or compensation amount to more than 3-1/4 million veterans of whom almost 900,000 are over the age of 65. Total expenditures for this aged group amounts to approximately \$1.25 billion annually.
- Approximately 90,000 aged veterans afflicted with blindness, deafness or major disabling handicaps (such as loss of or loss of use of a limb) are receiving in excess of \$300 million annually.

CHAPTER II:

ASSURING APPROPRIATE LIVING ARRANGEMENTS

PART A: HOUSING-
DEVELOPING
ELDERLY HOUSING

Conference Recommendations: A major concern of the participants in the Housing Section was the need for a commitment on the part of government at all levels which would ensure a steady flow of housing for the elderly, using appropriate incentives as needed.

The Section's lead recommendation, therefore, called for a fixed proportion of all government funds--Federal, State, and local--to be earmarked for housing for the elderly, with a minimum production of 120,000 units a year.

The principle of earmarking funds for elderly housing was extended by the Housing Section and by other groups of Conference participants to include groups with special needs. The Housing Section called for particular attention to the Housing "of all minority groups and the hard-core poor elderly. At least 25 percent of the elderly housing shall be for . . . those with incomes at the poverty level or less . . ." The Housing Section also recognized what it called the "unique needs" of the rural elderly, including those on Indian Reservations, and recommended special Federal funding of housing programs for this group of Older Americans. For the poor elderly and the rural elderly, respectively, similar recommendations for special and expanded Federal housing programs were made by the two Special Concerns Sessions organized around these target groups.

Other Special Concerns Sessions also addressed recommendations to the housing needs of particular segments of the older population. The session on Aging and Aged Blacks recommended that Federal policy require the provision of low and moderate income elderly housing in all new communities, planned unit developments, urban renewal areas, model cities areas and similar Federally funded developments, and to require reports to show that they are serving minority groups. This group proposed, as did the Housing Section and the Elderly Asian Special Concerns Session, more support for minority nonprofit organizations seeking to expand the supply of low and moderate income housing for the elderly. The Special Concerns Sessions on the Spanish-Speaking Elderly, the Asian American Elderly, and the Elderly Indian each proposed that special funds for housing be set aside for these respective minority groups. The Special Concerns Session on Aging and Deafness pointed out the need for greater consideration in meeting the housing requirements of handicapped persons.

PART A: HOUSING-
DEVELOPING
ELDERLY HOUSING
(Cont'd)

The Housing Section expressed a strong preference for the favorable financing aspects and guidelines of Section 202 (Direct Loan Program) of the Housing Act. It strongly recommended that the 202 program be reactivated and expanded by releasing appropriate housing funds now impounded and recirculating the monies received from mortgage payments on 202 projects. The Section did not recommend closing out the 236 program, but did suggest that it be brought under the same Federal management and audit unit as the 202 program. The Section also called for the elimination of red tape and procedural delay in the production of housing for the elderly.

One incentive to increase production suggested by the Housing Section was a subsidy to State and local governments for the exemption from property taxes of voluntary, non-profit housing projects for the elderly.

Administration Response: The Administration is firmly committed to the goal of a decent home and a suitable living environment for every American family, including the elderly.

The President reiterated his support of this goal in his message on Community Development in March 1973: "While we believe that some of our housing programs have failed and should be replaced, we should never waiver in our commitment."

The President also stated: "In pursuing our goal of decent homes for all Americans, we know that better means are needed--that the old and wasteful programs, programs which have already obligated the taxpayer to payments between \$63 billion and \$95 billion during the next 40 years, are not the answer."

"One of my highest domestic priorities this year will be the development of new policies that will provide aid to the genuinely needy families and eliminate waste."

"A major housing study is now underway within the government, under the direction of my Counsellor for Community Development. Within the next six months, I intend to submit to the Congress my policy recommendations in this field, based upon the results of that study."

The special problems and needs of elderly persons will, in the course of this study, be given close consideration.

In addition, in the March message, the President said, "In the near future, I will submit to the Congress the Better Communities Act to provide Revenue Sharing for community development. Beginning July 1, 1974, this

PART A: HOUSING -
DEVELOPING
ELDERLY HOUSING
(Cont'd)

Act would provide \$2.3 billion a year to communities to be spent as they desire to meet their community development needs. In the interim period before the legislation becomes effective, funds already available to the Department of Housing and Urban Development will be used to maintain and support community development."

In the development of the proposal for submission to Congress and in its implementation upon enactment, consideration will be given to the special needs of older persons.

- o Since 1969, the Federal government has approved approximately 250,000 units specifically designed for the elderly, more such units than in the entire 34-year history of our national housing program preceding this Administration.

In Fiscal Year 1972, nearly 68,000 units of subsidized housing specifically designed for the elderly were funded under the Section 236, rent supplement, and low rent public housing programs of the Department of Housing and Urban Development. Additional elderly families will also benefit from 329,000 other general family type units also funded during Fiscal Year 1972. In addition to these units, another 11,781 accommodations, mostly for the elderly, were insured during the past fiscal year under the Department's nursing and intermediate care facility programs.

In connection with the basic review of housing policy, the Federal subsidized housing programs were suspended effective January 5, 1973. During the review, the Federal government will continue to honor commitments already made and the level of subsidized housing starts during calendar year 1973 is expected to exceed the previous year's level.

While the Federal government has been the major source of assistance for elderly housing, the States, as the Conference recognized, play a major role in this area. Many States and localities have created their own housing agencies which provide programs to assist the elderly; decisions on housing location and type are made at the local level.

PART A: HOUSING-
DEVELOPING
ELDERLY HOUSING
(Cont'd)

It is hoped that recently adopted efforts to strengthen Federal interagency cooperation, in support of State planning for aging, will result in more State and local attention to housing for the elderly.

- o The Department of Housing and Urban Development initiated several organizational changes to ensure that its programs were responsive to the needs of older Americans.

At the Federal level, HUD appointed an Assistant to the Secretary for Programs for the Elderly and the Handicapped to assess all programs to ensure that they are fully responsive to the needs of the elderly. In addition, specialists in programs for the elderly were designated in all major program areas in the Department.

On June 26, 1972, the Secretary of Housing and Urban Development directed the Regional Administrators to establish a position of Specialist for Housing for the Elderly and Handicapped. This Specialist was charged with serving as principal advisor within the Regional Office on the production of housing for the elderly and handicapped, maintaining effective liaison with similar Specialists in the Area and Insuring Offices.

These organizational arrangements are being reviewed in connection with the study of housing policy that is taking place to assure that the Federal government most effectively serves the needs of the elderly.

- o The Administration, in administering housing programs, has sought to make Federal housing programs more responsive to the needs of the elderly poor and minority groups in the following ways:

--Federal housing programs have provided subsidies for minority groups and poor elderly in excess of the 25 percent of the total of Federally subsidized units which the Conference recommended.

Almost 90 percent of the Housing and Urban Development assisted units occupied by the elderly have been in public housing which have been targeted toward low income groups. Thirty-five percent of these units are occupied by members of the black community. The median income level of these tenants is \$1,481 for individuals and \$2,767 for families.

PART A: HOUSING-
DEVELOPING
ELDERLY HOUSING
(Cont'd)

This Administration will continue its concern for persons with lower incomes in the development of programs and policies to address housing needs.

- The Administration has actively encouraged the participation of minority sponsors in Federal housing programs.
- The Department of Housing and Urban Development has begun collecting and evaluating data concerning the participation of minority groups in Federally funded programs and the responsiveness of these programs to them.
- o Both the Departments of Agriculture and Housing and Urban Development have worked on meeting the special housing needs of the rural elderly.
- The Administration has provided a large volume of housing under rental programs serving low income older persons in rural areas.

More than 40 percent of the 12,000 Farmers Housing Administration (FHA) rental units financed since 1969 are occupied by persons 62 years and over, most of whom have low incomes.

The Department of Housing and Urban Development has also been active in housing programs in small towns. In low rent public housing there are nearly 230,000 units in communities under 10,000 population. In communities of 5,000 and under there are 156,000 units operated by over 2,000 local housing authorities, including over 100 Indian Housing Authorities providing 29,000 housing units. Many of these are utilized by and also designed for the elderly.

- The Farmers Home Administration has provided loans to older persons who own homes in rural areas.

In Fiscal Year 1971, the Farmers Home Administration made over 4,400 initial individual housing loans totaling \$44 million to persons 62 years of age and older. In fiscal 1972, this increased to 4,700 loans totaling nearly \$56 million. The foregoing amounts include loans made to low income rural families to repair or modernize their homes. In the last four years the low to moderate income housing program has helped nearly 14,000 low income older families in rural areas.

PART A: HOUSING-
CHOICES IN
ELDERLY HOUSING

Conference Recommendations: The concept of housing the elderly has been greatly broadened over time. No longer is it conceived of as providing older persons a quiet place in the country where they can exist out of sight and out of mind.

Today, the effort is to provide a variety of choices from which the older person can select the one most suited to individual needs and preferences. The congregate housing concept is seen as a visible community resource serving not only its residents but, also, as the Section on Housing and several Special Concerns Sessions recommended, it should serve those old people living in adjacent neighborhoods.

In order to maximize the range of housing choices, the Housing Section recommended four categories of residentially-oriented settings which relate to the different service requirements of elderly persons:

- long term care facilities for the sick;
- facilities with limited medical, food, and homemaker services;
- congregate housing which would provide food and personal service, but not medical care services;
- housing for wholly independent living with recreational and activity programs.

The Sections on Housing, and Facilities, Programs, and Services, and other Sections and Special Concerns Sessions recognized that another, and for many, the preferable alternative to any type of congregate living, is for older people to remain in their own homes or to live with their children or relatives. The Housing Section, for example, proposed that financial incentives be made available to families providing housing and related care in their own homes for their relatives. The Special Concerns Session on the Asian American Elderly proposed a substantial tax incentive to the members of the younger generation who can provide housing and/or other supportive care for their elderly relatives. Similar recommendations were offered by three Special Concerns Sessions.

One proposal made by the Housing Section to enable older persons to remain in their own homes was the use by homeowners of the equities in their homes. While the Section did not endorse a particular plan, it did recommend that "ways or mechanisms be researched to enable older homeowners to voluntarily utilize the equities in their homes; to increase their discretionary income while remaining in their own homes."

PART A: HOUSING -
CHOICES IN
ELDERLY HOUSING
(Cont'd)

Property maintenance was another means, Conference delegates felt, of accomplishing the same end. Varied proposals to provide more funds for the maintenance and rehabilitation of owner occupied property were made by the Housing Section and the Special Concerns Session on the Rural Elderly, the Poor Elderly, Spanish-Speaking Elderly, and Youth and Age. The Housing Section proposed a plan for interest-free, nonamortized loans. The amount of the loan would be related to income, with repayment either upon the death of the borrower or the transfer of the property.

As yet another means, increased funding of the rent supplement program was advocated by the Housing Section and the Special Concerns Sessions on Spanish-Speaking Elderly, Asian Elderly, Aging and Deafness, and Poor Elderly.

Administration Response: The Administration accepts the concept recommended by the delegates to the Conference that older persons should have the opportunity of choosing the type of housing that is best suited to their needs, including the opportunity to continue to live in their own homes.

- o This concept will be considered in the review of housing programs and policies now underway.
- o The Administration is undertaking a housing allowance experiment which will evaluate programs which provide recipients with cash to "shop around" for housing, thus enhancing their mobility and free choice.
- o Skilled nursing homes, intermediate care facilities, hospitals, group medical practice facilities, and many varieties of housing combinations are provided under several mortgage insurance programs and are further aided through secondary market activities of the Government National Mortgage Association and the Federal National Mortgage Association.
- o The Administration supports the use of model project funds by the Administration on Aging (in conjunction with the Department of Housing and Urban Development) for demonstration home maintenance programs.

The Farmers Home Administration has provided loans to help low income rural elderly purchase homes as well as make needed repairs on existing homes. The Department of Housing and Urban Development makes insurance of home improvement loans available to home owners.

PART A: HOUSING-
CHOICES IN
ELDERLY HOUSING
(Cont'd)

In addition to programs to preserve and repair the physical housing structure, services are also essential to enable older Americans to live independent and dignified lives in their own homes. (See Services to Maintain Independence)

- o Tax relief is being provided to households taking care of dependent elderly persons who are incapable of taking care of themselves.

Many older persons choose to live with their children or relatives. In some cases, this preference places a financial burden on the families in question. Internal Revenue Service regulations do provide some relief. If, for example, a parent who is incapable of taking care of himself or herself lives with a son or daughter, the son or daughter can deduct up to \$400 a month in expenses to have the parents taken care of in order to permit the taxpayer to be gainfully employed. In the case of disabled persons, deductions are adjusted depending upon outside disability payments from various sources.

PART A: HOUSING -
HOUSING DESIGN
AND STANDARDS

Summary of Conference Recommendations: Several Conference groups dealt with the need for policies to assure quality housing and an appropriate physical and social environment for elderly people. The Housing Section proposed that standards for physical and environmental security be developed and applied as integral and basic elements of all elderly housing projects. The Section further recommended that Federal agencies administering housing programs for the elderly be required to establish multi-disciplinary teams to formulate guidelines for architectural standards based on the needs of the elderly, and to review and approve innovative proposals for elderly housing.

Another recommendation of the Housing Section which would have special value for multi-disciplinary teams, called for a research program to (a) cover the health, physical, psychological and social aspects of the environment in both urban and rural areas; (b) give special attention to the housing problems of the very old and the transient elderly; and (c) study the consequences of different locations and construction types for the elderly.

Recommendations from several Special Concerns Sessions were also addressed to design and standards for elderly housing. The panel on the Older Family proposed that housing and homes for aging persons should be designed to accommodate elderly couples who wish to share private quarters. The Legal Aid and the Urban Aged Sessions focused on the concern

PART A: HOUSING -
HOUSING DESIGN
AND STANDARDS
(Cont'd)

for special security measures, urging the Law Enforcement Assistance Administration, Department of Housing and Urban Development, and other Federal agencies to provide funds for new methods to protect the elderly against crime. The Spanish-Speaking Elderly Session recommended that future housing projects for such persons be constructed with cultural considerations in mind, while the Session on Aging and Deafness called for housing facilities that reflected the needs of handicapped, particularly deaf, persons. The Special Concern Session on Aged and Aging Blacks recommended that Federally approved housing be equipped with those mechanisms that would ease the lives of the residents, including telephone service.

The Special Concerns Session on Youth and Age proposed greater consideration of governmental support for community settings where younger families and older families can live together.

Administration Response: The Administration has committed attention and resources to special housing design needs of older Americans and will maintain its concern in this area.

The elderly have many special problems that do not confront younger age groups. Nowhere is this more clearly seen than in housing for older persons. As people become older they no longer have the physical capacity of earlier years. Climbing stairs becomes more burdensome, hearing becomes less acute, and eyes become less efficient. Crime and personal security are especially serious problems for the older citizen. For these reasons, meeting the housing needs of the elderly takes on many complexities not found within the general housing market.

The Department of Housing and Urban Development has taken the following actions to meet the environmental design and standards needs of housing the elderly.

- o The Department of Housing and Urban Development is revising and improving its standards for the minimum acceptable level of planning, construction and materials for all Departmental insured housing programs.

These proposed revisions have been circulated to many groups and specialists for review and comment. Cultural and ethnic considerations will continue to be part of housing design and environmental development. To better understand these and other varied needs of the elderly, HUD is consulting with groups and individuals encompassing a wide variety of disciplines and is working closely with the Administration on Aging in the area of research.

PART A: HOUSING -
HOUSING DESIGN
AND STANDARDS
(Cont'd)

o The Department of Housing and Urban Development has taken steps to help combat the problem of crime and provide personal security.

The needs of the more vulnerable older person are being emphasized through minimum property standards to meet basic crime insurance regulations, and modernization programs in which lighting and other safeguards against crime are provided.

HUD has encouraged local communities to increase protective services available to local housing authorities and is supporting research by the Law Enforcement Assistance Administration of the Department of Justice in crime prevention in housing areas. HUD and LEAA have set up a multi-agency task force to seek ways of improving security in public housing projects.

- o The recently established National Center for Housing Management will stress training in the management of elderly projects.

The National Center for Housing Management (NCHM) was created in April 1972 and received grants from HUD in order to develop more effective ways to manage public and publicly assisted housing.

While all residents are expected to benefit from this move, special efforts are being made in behalf of older persons. The Administration on Aging has supported the development of a training program by the center that deals with general and unique needs of the elderly. In addition, HUD is using research funds to assist 13 local housing authorities in cooperation with their respective governments, to demonstrate new management approaches.

PART A: HOUSING -
RELOCATION AND
PRESERVATION OF
NEIGHBORHOODS

Summary of Conference Recommendations: Relocation due to highway and urban renewal projects has been a special problem of the elderly in the cities. Consequently, Conference groups made several recommendations to assure that displaced elderly persons receive adequate replacement housing. The Housing Section proposed that adequate replacement units be available before persons are displaced. They proposed that government encourage neighborhood rehabilitation as a means of allowing the elderly to remain in a familiar environment. Renovation instead of demolition was also urged by the Spanish-Speaking Elderly and Poor Elderly Special Concerns Sessions. Similar recommendations were proposed by the Special Concerns Sessions on Asian Elderly and Rural Older People.

PART A: HOUSING-
RELOCATION AND
PRESERVATION OF
NEIGHBORHOODS
(Cont'd)

Administration Response: The Administration recognizes that older persons face particularly severe problems when they are forced to relocate and is responding by ensuring that adequate replacement units will be available before persons are displaced.

The Uniform Relocation and Real Property Acquisitions Policies Act of 1970 makes Federal assistance to State and local projects (including urban renewal and highway projects) contingent on assurances from the state and local agency that "within a reasonable period of time prior to displacement, decent safe, and sanitary replacement dwellings will be available to displaced persons..." In this regard, the Act provides for advance, "seed money," loans to nonprofit and limited dividend sponsors who wish to work with the displacing agency in planning and developing residential units for those about to be displaced. The Department of Housing and Urban Development has recently issued guidelines to implement this provision.

PART A: HOUSING -
ELIGIBILITY FOR
PUBLICLY ASSISTED
HOUSING

Conference Recommendations: The Housing Section recommended that Congress revise the definition of a family in the National Housing Act to make single individuals, 55 years and over, eligible for publicly assisted housing.

Consideration was also given to the eligibility criteria for publicly assisted housing, which have always been related to economic need. The Housing Section proposed a change in this policy. Recognizing that social need does not bear a one-to-one relationship to income, they recommended that the criteria for eligibility be extended to include social need.

Specifically, the Section recommended that eligibility for the benefits of publicly assisted low and moderate income housing and related services shall be based on economic, social and health needs. Recipients having incomes above an established level would be required to pay for benefits on a sliding scale related to their incomes.

PART A: HOUSING -
ELIGIBILITY FOR
PUBLICLY ASSISTED
HOUSING
(Cont'd)

Administration Response: The Administration in its current review of housing policy, will consider a lower age limit of eligibility for public housing as well as the effectiveness of other eligibility criteria.

- o The Department of Housing and Urban Development will encourage local housing authorities to permit older persons to remain in publicly-assisted housing after their income exceeds limits for eligibility.

The National Housing Act presently provides considerations whereby a tenant may remain in residence in public housing even though his income has exceeded eligibility limits. The Department of Housing and Urban Development will continue to encourage housing authorities to retain elderly tenants who might otherwise become ineligible as a result of the recent increase in Social Security income.

The Administration has considered the Conference recommendation that eligibility criteria be extended to include social needs. It recognizes that eligibility criteria for any program participation inevitably will leave out some people who might benefit from public housing. However, it believes that the most reasonable and equitable judgements on eligibility developed to date are related to economic considerations. These considerations are measurable and also tend most frequently to coincide with the social and health needs of families.

PART B:
NURSING HOMES -
QUALITY

Conference Recommendations: The Long-term Care Session made several recommendations related to regulating the quality of nursing home care. In a close vote, (29-26), the Session adopted a recommendation calling upon the Secretary of Health, Education and Welfare to report by December 31, 1972, on the feasibility of health facilities, including nursing homes, becoming public utilities. In a separate recommendation this group expressed the view that patient care could be improved by providing incentives for more frequent visits by a patient's physician. Another proposal was to shift the focus of nursing home inspection from physical plant standards to the quality of direct patient care. In a different recommendation addressed to nursing home inspection, the Elderly Consumer Session proposed that State investigative teams inspecting health facilities include an eligible consumer from the community.

A related recommendation of the Long-term Care Session called for the provision of social services as part of an integrated approach to comprehensive and quality patient care. In much the same vein, the Aging and Aged Blacks Sessions proposed adoption of a new concept of long-term care, a "Socio-Medical approach", which would utilize progressive patient care techniques (intensive, intermediate, minimum care, rehabilitation, resettlement) integrated with a wide variety of community service.

The Aging Black Session also recommended that special attention be given to establishment of nursing homes for blacks that take account of cultural backgrounds and special income problems. In this connection, the Aging Blacks Session voiced a concern that home care is more the rule than the exception for elderly minority persons, and asked that quality institutional care be made available to minority elderly without discrimination.

Another set of recommendations ranged widely over the subject of nursing home care. The Facilities, Programs, and Services Section proposed that a full range of services recognizing cultural differences be made available in institutions. Comparable recommendations were made by the Sessions on Asian American Elderly and on Spanish-Speaking Elderly. The Session on Aging and Deafness suggested that services be offered to meet the special needs imposed by deafness. And, the Spiritual Well-being Section recommended that chaplaincy services be made available to institutional care patients, funded, if need be, from public revenues.

PART B:
NURSING HOMES -
QUALITY (Cont'd)

Administration Response: A major policy of this Administration is to take forceful steps to assure that nursing homes will provide the care and comfort that the patients need and deserve.

Americans pride themselves on their independence and self-reliance. We can strengthen these characteristics for older Americans by securing for them an adequate income and other programs to enhance their independence and dignity. This Administration is committed to taking the steps that will provide the in-home services that will prevent unnecessary institutionalization.

However, some of the elderly cannot be primarily self-reliant. These older men and women require the assistance provided by skilled nursing homes and other long-term care facilities. For them, a dignified existence depends upon the care and concern which are afforded them in such settings. Many nursing homes provide high quality care, but too many fall short of the standards necessary to assure the health and safety of the patients.

The Administration has moved to improve the quality of nursing home care in the following ways:

- o The President has launched and followed-up on a vigorous program to assure that nursing home patients get the kind and quality of care they need and deserve.

In an address to a group of older persons on June 25, 1971, the President stated that Medicare/Medicaid funds should not be used to subsidize substandard nursing homes. At Nashua, New Hampshire, on August 6, 1971, the President announced an eight-point plan aimed at upgrading long-term care facilities throughout the Nation and developing Federal initiative in institutional and non-institutional long-term care.

On July 19, 1972, the President and his Special Consultant on Aging met with officials of the Department of Health, Education and Welfare to receive a report on progress made in implementing this eight-point program. The following can be reported:

--Cut-off of Federal funds to substandard nursing homes. The Department of Health, Education, and Welfare surveyed 47 States, Puerto Rico and District of Columbia Medicaid nursing home standard enforcement programs and found 39 states deficient as of November 30, 1971. States were given until February 1, 1972, to upgrade certification programs, and until July 1, 1972, to act on certification of

PART B: NURSING -
HOMES QUALITY.
(Cont'd)

- all 7,000 Medicaid skilled nursing homes. As of September 1, 1972, of the 7,091 facilities eligible for Medicaid funds, 6,391 had been certified, 360 had been decertified or had withdrawn from the program, and 340 facilities in two States were pending certification because of court action.
- Coordination of Federal enforcement activities. Within the Department of Health, Education and Welfare, an Office of Nursing Home Affairs was created and a Special Assistant for Nursing Home Affairs was appointed. This new office was charged with coordinating enforcement programs of the Social and Rehabilitation Service, Medical Services Administration, Social Security Administration and Health Services and Mental Health Administration.
 - Training of state nursing home inspectors. Four-week, university-based training was provided for 1,000 of the Nation's State health facility surveyors as of March 1, 1973. The remainder are expected to be reached within Fiscal Year 1973.
 - Federal assumption of state Medicaid nursing home inspections costs. The President proposed legislation for Federal assumption of state Medicaid nursing home inspection costs on October 7, 1971. Enacted as part of H.R. 1 (P.L. 92-603) this legislation encourages States to further expand enforcement resources and upgrade health facility survey programs.
 - Expanded resources for Federal nursing home standards enforcement. A staff expansion was requested and authorized by Congress as part of a \$9.6 million Nursing Home Supplemental Appropriation sent to the Congress on October 7, 1971 and signed by the President on December 28, 1971. The new funds enabled deployment of 227 additional enforcement personnel, with most distributed among 10 Department of Health, Education and Welfare regional offices to provide technical assistance to State inspection programs.
 - Training of medical and allied health professionals working in nursing homes. Federally-sponsored programs operated in conjunction with national professional associations and nursing home groups are programmed to reach 20,000 of the Nation's 500,000 long-term care personnel this year, with an additional 20,000 next year. Primary focus is on physicians, nurses, nursing home administrators and patient activity directors.

PART B:
NURSING HOMES--
QUALITY
(Cont'd)

- Assisting states to establish nursing home patient ombudsman units. Five models have been developed for testing this year to assist States in setting up nursing home patient ombudsman units. Contracts with four States and a national organization have been completed. Pending the outcome of field tests, 954 Social Security District Offices were ordered to receive complaints from patients and relatives for forwarding to appropriate state agencies. More than 2,000 complaints have been acted upon to date.
- Review and development of new Federal policy and program proposals.

The Office of Nursing Home Affairs has initiated studies of long-term care in three essential areas: the quality of institutional care, the alternatives to institutional care, and ongoing data collection and analysis. The quality study will focus upon the development, testing, and evaluation of measures of the performance of institutions, and the assessment of the outcome to patients of care within institutions.

The study of alternatives to institutional care will focus upon the appropriate placement of patients, with attention to the delineation and scope of supportive services needed, financing mechanisms, cost of care, and health status. The data collection and analysis study will develop a systematic data/report plan to produce uniform data on nursing homes and intermediate care facilities. The data system will provide comprehensive data on a local, state, regional, and Federal basis.

These studies will last at least two years. Results from these studies combined with consultation from the Long Term Care Review and Research Committee, will enable The Office of Nursing Home Affairs to formulate Federal policy recommendations on a long-term care. The Review and Research Committee is comprised of representatives of governmental agencies and outside experts who make up a coordinated effort to address the issues in long-term care.

- o Proposed regulations governing Intermediate Care Facilities under Medicaid have been published for public comment.

Intermediate Care Facilities provide health related care and services to those who do not need care in skilled nursing homes, but require institutional care beyond room and board.

When the new regulations are promulgated, they will provide Federal standards for care provided for Medicaid patients in Intermediate Care Facilities. The new standards will be a valuable tool in the President's determination to upgrade the quality of long-

PART B:
NURSING HOMES -
QUALITY (Cont'd)

term care. The standards will cover physical facilities, (e.g., Life Safety Code) and certain health and rehabilitative services. In addition, the new regulations will apply to all eligible public institutions for the mentally retarded providing for minimum levels of care and treatment for this population.

- o The Veterans Administration is carrying out a program to improve the quality of nursing home care in the institutions under its control.

Nursing Home quality is a major concern of the Veterans Administration. The VA will provide for about 15,000 nursing home beds, about half of which are contracted for with private nursing homes or are in state programs receiving financial assistance from the VA. To assure the quality of contractual nursing home accommodations, the VA uses a multi-disciplinary inspection team which applies quality standards similar to those of the Medicare and Medicaid programs. An important facet of the VA inspection program is that periodic visits are made by hospital personnel (usually social workers or nurses) to nursing homes under contract to assure that the patient is receiving the care the VA has contracted for and to see that the patient does not deteriorate because of neglect.

The VA has also been attempting to improve the aesthetic quality of its own facilities by incorporating new features into its nursing home construction and operation.

- o Through both the Medicare and the Medicaid programs, steps have been taken to assure adequate medical participation in the care of older persons in nursing homes.

The Conference's concern about physicians' visits to nursing homes must be discussed in terms of differences between Medicare and Medicaid programs. There is no Medicare limitation on the number of medically necessary physician visits the program can pay for in skilled nursing facilities or in nursing homes. These visits may be made as frequently as needed by individual patients. If a Medicare patient is receiving institutional care in a facility below the extended care level and receives more than one visit a month, then the claim must be adequately documented to reflect the medical necessity of the additional visits. Where more visits are needed, reimbursements will be made.

Charge allowances are equated to physicians' charges for office visits under the Medicare program when the physician sees more than one patient during the same trip to a nursing home since (1) the level of services is ordinarily comparable to those furnished in the office setting; and (2) where a large group of patients is seen in the nursing home, the circumstances are much the same as if the nursing home were

PART B:
NURSING HOMES-
QUALITY (Cont'd)

a second office -- the physician realizes savings in time and expense similar to those found in his office setting, by seeing a number of patients in one place, and the physician has the advantage of having available the facilities and personnel of the nursing home. Of course, a higher charge may be allowed where special circumstances or medical complications warrant it.

Under the Medicaid program, the State determines the policy concerning physician reimbursement for nursing home visits not to exceed 75% of customary and prevailing charges.

- o The Department of Health, Education and Welfare is currently financing the training of nursing home personnel to recognize and deal with emotional problems faced by patients in long-term care institutions.

While specific actions are being taken to upgrade the quality of nursing home care through higher standards of care, attention is also being given to developing programs reflecting the total needs of patients.

Some of the funds appropriated for training of nursing home personnel are being used to develop special programs for teaching nursing home personnel to recognize the emotional problems faced by patients who must live in long-term care institutions and to demonstrate to the nursing care staff methods of care to alleviate these problems. These programs to enhance the psychological aspects of patient care are being developed in cooperation with some of the Federally funded community mental health centers as demonstration programs. Five programs of this type are currently being developed. Also regional office staff are encouraging many mental health clinics and programs to increase their services to patients in nursing homes and to participate in inservice education programs.

NURSING HOMES-
FUNDING

Conference Recommendations: Conference groups made a number of recommendations related to the funding and financing of nursing home facilities and services.

In the area of nursing home construction, the Long-Term Care for Older People session recommended that Federal financing of nursing homes (and other health facilities) be available in "the form of a 40-50 year loan with a three to five percent interest rate or a guaranteed loan system." The Aging and Aged Blacks Session also gave recognition to the construction of long-term facilities, especially those owned by black sponsors, and urged that grants and low interest bearing loans be provided for renovation and construction to meet State and Federal standards.

PART B:
NURSING HOMES-
FUNDING (Cont'd)

Several recommendations were proposed which would affect the financing of long-term institutional care. The Long-Term Care group proposed what it termed the "complete federalization" of the long-term institutional care component of the Title XIX (Medicaid) program. Federalization was specified as comprising uniform nationally-set standards and benefit levels, and funding through general revenues. This recommendation, along with one of the Special Concerns Sessions on Aging and Aged Blacks was coupled with the further proposal that payments to providers of long-term care cover actual costs and, in the case of proprietary facilities, allow for a fair return on investment. The Session also recommended that prospective rate setting be encouraged. The Special Concerns Sessions on Aging and the Aged Blacks and the Elderly Poor both sought to extend the period during which coverage under Medicaid-Medicare for long-term care is available. The Session on Aged Blacks also recommended that Medicare coverage should be expanded to cover long-term care and extended care without prior admission to an acute care hospital.

Other recommendations came from the Facilities, Programs and Services Section which urged that adequate resources be made available to assure a wide range of quality institutional care, though it did not specify what form this assistance should take, and the Aging and Aged Blacks session also urged that the money spent annually by the Federal government on private nursing homes should be diverted to non-profit social utilities and homes sponsored by religious or benevolent organizations, or community corporations with joint consumer control and equity by a representative number of the elderly receiving services.

Administration Response: Additional efforts are underway to increase the number of nursing home units available to elderly persons. The Federal emphasis must, however, continue to be one of assisting in financing of services provided in nursing homes through Medicare and National Health Insurance.

- o Nursing home accommodations insured by the Department of Housing and Urban Development have increased.

In Fiscal Year 1972, accommodations for nearly 12,000 people, most of them elderly, were insured under the Department of Housing and Urban Development's nursing home programs and this is projected to increase during the current fiscal year.

PART B:
NURSING HOMES-
FUNDING (Cont'd)

- o President Nixon increased the authorized number of nursing home care beds for the Veterans Administration programs.

Nursing home accommodations of the Veterans Administration are also being expanded. President Nixon increased the authorized number of such nursing home care beds from 6,000 to 8,000. This will permit an increase in the total number of nursing home accommodations available through Veterans Administration programs to about 15,000 in 1973. Four thousand five hundred of these will be contracted with private nursing homes and approximately 3,800 beds will be available through subsidies to State nursing homes providing accommodations for veterans.

- o Federal Medicare and Medicaid funds pay for over \$1.5 billion of services to the elderly in skilled Nursing Home and Intermediate Care Facilities.

In Fiscal Year 1972, Federal Medicare payments for services in skilled nursing facilities amounted to \$180 million, while Medicaid supported \$898 million for services in Skilled Nursing Facilities and \$440 million for patients in Intermediate Care Facilities. The total of the Federal payments was \$1.518 billion in Fiscal Year 1972. It is estimated that these payments will reach \$1.978 billion in Fiscal Year 1974.

- o The Social Security Amendments of 1972, P.L. 92-603, authorized an experiment dealing with the possibility of eliminating or reducing the 3-day-prior-hospitalization requirement.

These experiments will examine the advantages and disadvantages of coverage for direct admissions to long-term and extended care institutions. Plans for use of this authority are now being developed.

- o P.L. 92-603 liberalized the eligibility for nursing home care in Medicare.

The Medicare coverage for services provided in extended care facilities was expanded to include skilled nursing home services.

CHAPTER III:

ASSURING INDEPENDENCE AND DIGNITY

SERVICES TO
 MAINTAIN
 INDEPENDENCE

Summary of Conference Recommendations: A significant number of recommendations, supported by many Sections and Special Concerns Sessions called for expanding or developing the provision of services to make possible independent living for older persons. Such services included home medical care programs, home nutrition education services, visiting nurse programs, homemaker-home-health aid services, outpatient psychiatric services, home delivered meal programs, transportation services and religious and spiritual counseling programs. Delegates to the Conference broadly supported the contention that the Federal government should assume primary responsibility for financing the provision of such services.

The Facilities, Programs and Services Section recommended that the Federal government finance a basic core of such services. Several alternative means were proposed through which this recommendation might be achieved, including: provision of an adequate income to all older persons; continued open-ended funding for the social services provisions of the Social Security Act; coverage of personal care services through social insurance to enable older persons to purchase services independently.

The Special Concerns Session on Aging and Blindness also called for payment of personal care benefits.

The Retirement Roles and Activities and Housing Sections, and the Special Concerns Sessions on the Religious Community and Aging, the Older Family and Asian-American Elderly preferred that families assume responsibility for providing supportive services to the elderly, but the Retirement Roles and Activities Section called for a Federal role in the absence of a family alternative.

Federal support for a family role was called for the Special Concerns Sessions on the Asian-American Elderly, the Older Family and the Religious Community and the Aging, each of which urged tax relief for families that assist older relatives.

Administration Response: The Administration is prepared to work with States, local communities and the private sector in a new effort to bring into existence comprehensive coordinated service programs for older persons at the community level. These programs should be designed to enable older persons to maintain their independence by remaining in their own homes or other places of residence.

SERVICES TO
 MAINTAIN
 INDEPENDENCE
 (Cont'd)

The Administration believes that the Federal, State or local financial resources that are available provide a significant opportunity to increase the number of communities with comprehensive and coordinated service programs for older persons. Federal financing can be made available through a combination of significant programs, namely: (1) the Older Americans Act; (2) the Adult Services provisions of the Social Security Act; (3) General Revenue Sharing. In addition, Allied Services legislation is under consideration in HEW which would assist Governors in developing the capacities in State and local governments, as well as in private non-profit agencies to plan integrated service programs that are more responsive to the needs of families and individuals, including the elderly.

Following is a brief summary of these opportunities.

- o President Nixon has submitted a plan to the Congress for strengthening and expanding service delivery programs under the Older Americans Act.

In December 1971 the President told the delegates to the Conference that:

"We plan to give special emphasis to services that will help people live decent and dignified lives in their own homes--services such as home health aides, home-maker and nutrition services, home-delivered meals and transportation services."

Programs authorized under Title III of the 1965 Older Americans Act are a primary mechanism for services to help the elderly remain in their homes. To strengthen these service programs, the President has:

- Proposed increasing the budget for Federal support of nutrition programs and Title III projects to \$200 million.
- Asked the Congress to extend the Older Americans Act indefinitely.
- Submitted amendments to the Congress to strengthen the older Americans Act in order to further assure the independence of older persons.
- o Under the Adult Services provisions of the Social Security Act, the Federal government, within a ceiling for each State related to an overall national ceiling of \$2.5 billion, provides funds to pay 75 percent of

SERVICES TO
 MAINTAIN
 INDEPENDENCE
 (Cont'd)

the cost of services that enable individuals, including older persons, receiving public assistance to remain in their homes or return to their residence after hospitalization.

- o Under General Revenue Sharing, substantial sums could be used by both State and local governments to support coordinated and comprehensive service programs for older persons.

Federal funds that are made available to the States under this Act can be used for any purposes the State designates. It is assumed that State Offices on Aging, with support of individuals and organizations who are concerned about the initiation or strengthening of these services, will present proposals to the State for the use of some of these Federal funds.

Federal funds that pass through the States to local communities under this act can be spent for programs falling into categories identified in the law. One of these categories is social services for older persons. Here again, this provides an opportunity to initiate or expand community programs for older persons as a result of decisions by local governments to use some of the Federal funds for this purpose.

- o HEW presently has under consideration Allied Services legislation for transmission to Congress. The objective of such legislation would be to assist integrated planning and delivery of human resource programs.

--This legislation would encourage and assist governors in developing the capacity of States and localities to enter into cooperative human resources planning designed to establish and strengthen inter-relationships among the major providers of services and funds for services in the area of human resources.

--The legislation would provide planning and administrative support grants to develop integrated human service programs responsive to clients having more than one service need, such as the elderly.

--The service objectives of the legislation are to prevent and reduce dependency within vulnerable target populations so that they can lead more independent, self-sufficient lives.

SERVICES TO
 MAINTAIN
 INDEPENDENCE
 (Cont'd)

* * * * *

In addition to the opportunities outlined above, the following programs seek to enhance the independence of older Americans:

- o The Social Security Amendments of 1972 included a number of provisions which should contribute substantially to the independence of older persons and to their ability to live in their own homes. Among these are:
- The extension of Medicare coverage, beginning July 1, 1973, to people under 65 who receive Social Security disability benefits because they are disabled, after they have been receiving disability benefits for at least 24 consecutive months. Many disabled beneficiaries are of advancing age (the average age is 57) and the provision also includes disabled widows 50 or older.
 - Medicare coverage is also extended, beginning July 1, 1973, to people under 65 who need dialysis or renal transplantation for chronic renal disease, if they meet certain work requirements under Social Security or are receiving monthly Social Security benefits or are the spouses or dependent children of such persons. While Medicare beneficiaries aged 65 and over have had the benefit of this coverage, its extension to those not yet 65 should enable many more persons to enjoy prolonged life and to undergo renal dialysis at home rather than in a hospital.
 - Coverage is also extended, beginning July 1, 1973, for the services of a licensed, independently practicing physical therapist furnished in his office or in the patient's home under a physician's plan up to \$100 in a year.
 - The law now permits a hospital or skilled nursing facility to provide covered out-patient physical therapy services and out-patient speech pathology services under medical insurance to its own patients, if they have exhausted their in-patient days, or are otherwise not entitled to hospital insurance coverage of their services.
 - The Secretary of Health, Education and Welfare is authorized to conduct a broad range of experiments and demonstration projects including the use of intermediate care and home-maker services as alternatives to post hospital benefits now provided under Medicare; studying whether the services of clinical psychologists might be made more generally available to persons eligible under Medicare; and paying for services furnished by organizations providing comprehensive mental or ambulatory health care services, including ambulatory surgical centers. Plans for use of this authority are now being developed.

SERVICES TO
 MAINTAIN
 INDEPENDENCE
 (Cont'd)

- o The Veterans Administration continues to develop new techniques to help older persons remain independent in their own homes or other places or residence.

The Hospital Based Home Care Program is now deployed at 16 VA Hospitals and will ultimately be deployed at 69 VA Hospitals and will care for about 1700 patients in their own homes.

This program provides care in the beneficial environment of the patient's own home and facilitates rehabilitation and recuperation for patients who no longer require hospitalization and who cannot return to VA clinics for such care on a regular basis because of their disabilities. Physicians, nurses, social workers and physical therapists make house visits, and special medical and nutritional care information is provided to the families of the aged and ill.

To help more mobile citizens remain outside institutions, the Veterans Administration is now providing transportation to and from agency clinics where outpatient care is provided.

Under the Veterans Administration Social Work Service, aged patients with no homes of their own who would otherwise be institutionalized, are found housing in residential locations such as private and foster homes, boarding house and Veteran Administration domiciliaries.

- o A National Health Service Corps has been established which should demonstrate the feasibility of providing health services to the elderly in many inner city and remote rural areas currently lacking professional medical assistance.

The National Health Service Corps, while helping to meet the immediate health care needs of the total population, will devote much attention to the problems of developing outreach systems to provide care to those who need it most. Older persons living in certain urban inner cities, remote rural areas or other locations which have an undersupply of health personnel will benefit from this demonstration program. Corps administrators have selected 143 communities to receive its personnel and are seeking physicians, nurses and other health professionals to assign in order to complete the placement of 407 Corps members.

SERVICES TO
 MAINTAIN
 INDEPENDENCE
 (Cont'd)

- o The Administration has spearheaded a national voluntary effort in a program to help older men and women in 300 communities live dignified lives in the familiar settings of their own homes.

The Administration has supported, through the National Center for Voluntary Action, the establishment of the Steering Committee of National Voluntary Organizations which is seeking to improve homemaker-home-health aides and other in-home services for older persons. This committee is coordinating the creation of similar committees in at least 300 communities which will identify the needs of the elderly population, determine the resources available through existing volunteer channels, and organize them to meet the local needs.

- o The Department of Housing and Urban Development is funding demonstration programs to improve tenant services provided by local communities to residents in public housing, including the elderly.

The upgrading of life for older residents in public housing is a major objective of a demonstration program designed to employ new operating and management techniques in five local housing authorities. These demonstrations include plans for the local housing authority to draw upon resources available in the local community in order to provide extensive support services for low-income elderly public housing residents and the surrounding community.

Tax relief is being provided to households taking care of dependent elderly persons who are incapable of taking care of themselves.

Many older persons choose to live with their children or relatives. In some cases, this preference places a financial burden on the families in question. Internal Revenue Service regulations do provide some relief. If, for example, a parent who is incapable of taking care of himself or herself lives with a son or daughter, the son or daughter can deduct up to \$400 a month in expenses to have the parents taken care of in order to permit the taxpayer to be gainfully employed. In the case of disabled persons, deductions are adjusted depending upon outside disability payments from various sources.

PREPARATION
FOR RETIREMENT

Summary of Conference Recommendations: The need for broad and comprehensive pre-retirement education and counseling was mentioned in the recommendations of four Sections and three Special Concerns Sessions. They noted the need for support of such a program from several sectors including industry, labor, religious institutions, educational institutions, and local, State and Federal government. Each group that dealt with this topic agreed that pre-retirement programs should be available to and appropriate for all people approaching retirement. These programs should include information regarding governmental benefit programs, community informational and recreational facilities, and preventive physical and mental care.

The question of the implementation of a universal pre-retirement program produced substantial differences of opinion. The Section on Education recommended that the primary responsibility ought to rest with the public education system; the Section on Retirement Roles and Activities suggested that employers have a major responsibility for providing preparation for retirement programs and further suggested that the Social Security District Offices should offer individual pre-retirement counseling; the Section on Employment and Retirement saw implementation as a multiple responsibility but stressed the use of adult education agencies and television, and also recommended that each pension plan contain a retirement counselling component subject to approval by the Internal Revenue Service.

Most groups understood that preparation for retirement should be a life-long process. They, nevertheless, recognized that too often planning for retirement is started too late. The Employment/Retirement Section suggested that such programs be started at least five years before the normal retirement age to allow sufficient time "for the acquisition of necessary attitudes, skills, and knowledge" that would assure a rewarding retirement. The Retirement Roles and Activity Section endorsed a program both before and during retirement which would lead to physical fitness in old age.

Administration Response: The Administration believes that pre-retirement education should become an integral part of the personnel policies of employers in both the public and private sectors. Major emphasis should be placed on preparation for continued involvement in the life of society subsequent to retirement.

PREPARATION
FOR RETIREMENT
(Cont'd)

In furtherance of this objective the following steps have been or will be taken:

- o The Departments and agencies of the Federal government will be urged to set an example for other employers by initiating or strengthening pre-retirement programs under the leadership of the U.S. Civil Service Commission.
- o The Administration will support the use of funds by the Administration on Aging to conduct, in coordination with the Office of Education, model projects for pre-retirement education.
- o The Departments of Labor and Commerce will provide leadership designed to add significantly to the numbers of employers who provide pre-retirement education for their employees.
- o The Administration on Aging, in cooperation with the Office of Education, will develop materials designed to identify the roles that educational institutions at all levels are equipped to perform in the field of pre-retirement education.

FLEXIBLE
RETIREMENT
AGE

Summary of Conference Recommendations: Without comment on the probable adverse effect of early retirement upon the level of social security benefits, the Employment and Retirement Section recommended a flexible retirement age policy which would take into consideration possible retirement either before or after age 65. The Section's view was that chronological age should not be the sole criterion for retirement. The Facilities, Programs, and Services Section and the Special Concerns Session on Physical and Vocational Rehabilitation took the same position and agreed that flexibility is needed to take account of the worker's desires and his physical and mental capacity.

Administration Response: The Administration believes that organizations that have retirement policies requiring a worker to leave the job at a specified age should examine them to determine whether they are still serving a useful purpose and should be willing, when found appropriate, to experiment with or adopt alternative arrangements.

FLEXIBLE
RETIREMENT
AGE (Cont'd)

Mandatory retirement policies were often established to assure a worker's right to retirement. Experience under these policies has been mixed. They have the advantage of facilitating retirement planning and they avoid arbitrary application of a policy to individuals within an organization. Some organizations, however, have found it inconvenient to part with still-talented people at the prescribed time; and some workers resent having been forced from the job in accordance with the calendar rather than with their wishes or capacity.

The Federal Civil Service System now incorporates substantial flexibility on retirement age. The System provides for retirement at a variety of combinations of age and service (55 years of age/30 years of service; 60 years of age/20 years of service; 62 years of age/5 years of service; mandatory retirement at age 70 or above in combination with 15 years of service). The practical effect of these provisions is to give many Federal employees a choice of retiring whenever they wish between the ages of 55 and 70; even more have a choice between the ages of 60 and 70; and almost all have a choice between the ages of 62 and 70 or beyond. Moreover, the mandatory retirement provision in the System is considerably more liberal than mandatory retirement provisions in most private systems (typically age 65), or in many other public systems.

Several Departments operate programs of one year trial retirements for those who might like to retire early but lack confidence concerning their ability to make the necessary adjustments. This program aims to keep open the option to return to work should adjustment fail.

OPPORTUNITIES
FOR INVOLVE-
MENT

Summary of Conference Recommendations: The Conferencees stressed their concern for opportunities that would allow older persons to remain active and cited three situations where such opportunities were essential. The first situation concerns those older persons who desire to remain involved primarily to maintain an adequate level of income. A second situation concerns older persons who need part-time income and who also desire to remain active. And a third situation relates to older persons who need the psychic compensation that comes from continued involvement, for example, in community service programs.

Four Sections and four Special Concerns Sessions proposed liberalization of the retirement earnings test whereby Social Security benefits are reduced because of income earned from work. Although all groups recommended liberalization, there was no common recommendation as to the extent of the liberalization.

OPPORTUNITIES
FOR INVOLVE-
MENT (Cont'd)

The Income Section proposed raising the exemption level to \$3000. The Employment and Retirement Section recommended no benefit reductions until social security benefits plus earnings equals \$5000 a year, while the Session on Aging and Aged Blacks set the exemption level at the national median income. The Rural Older People and Physical and Vocational Rehabilitation Special Concerns Sessions specified no particular formula. In three cases -- the Retirement Roles Section, the Facilities, Programs, and Services Section, and the Special Concerns Session on the Elderly Indian -- it was recommended that unlimited earnings be allowed without reduction of social security benefits.

The employment and Retirement Section recommended changes in legislation to eliminate age discrimination in employment. More vigorous enforcement of existing legislation was also urged -- i.e. Federal, State and local government should strictly enforce employment anti-discrimination laws. It was also recommended that the age limit of 65 in the law be eliminated and the Age Discrimination Act of 1967 be expanded to cover all employees in both public and private sectors.

The Physical and Vocational Rehabilitation Special Concerns Session coupled a recommendation to amend current legislation to provide for positive enforcement of existing anti-discrimination legislation with a proposal that public and private hiring practices which bar the older disabled person from employment be altered.

Expansion and provisions of more job recruitment, training, counseling, and placement services were requested for older workers, both urban and rural. It was also recommended that a program be created to assist the middle-aged and older workers during transitions from forced job displacement into suitable jobs or retirement.

Recommendations addressed to improving the employment opportunities of the over 65 workers stressed the importance of categorical programs for which specific sums of money are earmarked and which provide specialized employment services.

Other recommendations called for mechanisms to make job opportunities known to workers. Such mechanisms would include a computerized national "job bank" and local centers for bringing together older workers and potential employers.

OPPORTUNITIES
FOR INVOLVEMENT
(Cont'd)

Beyond manpower policy in general, several groups addressed themselves to the issue of public service employment. There was no single approach to the issue, but the thrust of the recommendations was that the government should become more actively engaged in providing jobs for older workers.

The broadest position was taken by a majority of the Employment and Retirement Section who said the government has the responsibility to become the "employer of last resort" to provide meaningful and socially needed employment opportunities for older workers. A smaller proportion of the Section favored expanded and innovative programs to meet employment needs of older persons, but questioned the concept of the government being an "employer of last resort".

Because older people find it difficult to secure work in the regular job market, several Federally supported categorical programs were recommended. The Special Concerns Session on Aging and Aged Blacks recommended that a community service job program be created in which elderly blacks would receive sufficient consideration. The Rural Older People group agreed on the need for the community service program and called for expansion of such programs as Foster Grandparents, Green Thumb, Extension Service, Homemaker Aides and Senior Aides.

Another specific recommendation from the Poor Elderly Session proposed the enactment of a Senior Emergency Employment Act providing for one million full- and part-time jobs for persons 55 years old and over. It was further recommended by the three Special Concerns Sessions concerned with the disabled elderly that due consideration be given to the special needs of handicapped persons.

Recommendations from five Sections and at least six Special Concerns Sessions stressed that community and civic activities including programs providing services to older persons, be structured in such a way as to make possible the utilization of the skills and experience of older persons in both policy formulation and program implementation activities. A majority of the delegates participating in the Section on Retirement Roles and Activities called on the Federal government to implement social innovations which would provide meaningful participation in a broad range of activities in government, industry, education, recreation and volunteer service.

The Special Concerns Session on Volunteer Roles requested the strengthening of the retired Senior Volunteer Program, and asked that there be developed a workable definition of "Volunteer". Although most delegates

OPPORTUNITIES
FOR INVOLVEMENT
(Cont'd)

to these Sessions and Sections acknowledged the value of social service, some were concerned that such opportunities without financial remuneration would exclude those elderly who could not afford to take advantage of them.

Administration Response: This Administration strongly endorses the conviction of the Conference delegates that opportunities for employment and voluntary service in all sectors of society must be made available to older Americans.

President Nixon, in his Special Message on the Aging, has set the framework for a new attitude on the aging -- especially concerning opportunities for involvement--when he said, "We must fight the many forces which can cause older persons to feel dependent or isolated and provide instead continuing opportunities for them to be self-reliant and involved."

This Administration further believes that Government at all levels, as well as private industry, should facilitate the employment, not only of older workers between the ages of 45 and 65, but also those over 65. In support of this conviction, this Administration has taken the following actions to remove obstacles to employment and create opportunities for involvement in both the private and public sectors.

- o The President has signed P.L.92-603 (H.R.1), as a comprehensive Social Security bill containing provisions which liberalize the earnings test provisions in the Social Security Act.

In his 1968 campaign, President Nixon said he would seek to encourage older citizens to remain active in the economic life of the country. In 1969, he submitted legislation to liberalize the earnings test which limits how much a Social Security beneficiary under age 72 can earn from employment without having some benefits withheld; on October 30, 1972, the President signed legislation which greatly liberalized the test. Under prior law, some older persons chose not to work for additional income because Social Security payments were reduced by \$1 for each, for each \$2 or earnings between \$1,680 and \$2,880 and by \$1 for each \$1 of earnings over \$2,880.

Under the recently enacted legislation, the amount a Social Security beneficiary can earn in 1973 and later years without having payments reduced in \$2,100. This legislation provides that the exempt amount will be automatically increased in the future to keep pace with increases in maximum wages covered under social security. In addition, only \$1 in benefits will be withheld for each \$2 earned above \$2,100 no matter how high the earnings might be so that there will be no dollar-for-dollar reduction in benefits as previously occurred with respect to earnings above \$2,880. This assures that the more a social security beneficiary earns, the more spendable income he will have.

OPPORTUNITIES FOR INVOLVEMENT (Cont'd) ○ This Administration is moving to eliminate age discrimination in employment.

The Age Discrimination in Employment Act (ADEA) of 1967, prohibits discrimination in employment on the basis of age (for those persons between 40 and 65 years of age) in matters of hiring, job retention, compensation, and other terms, conditions, or privileges of employment. In support of the goals of the Act, President Nixon told Congress in March 1972:

"Discrimination based on age -- what some people call "age-ism" -- can be as great an evil in our society as discrimination based on race or religion or any other characteristic which ignores a person's unique status as an individual and treats him or her as a member of some arbitrarily-defined group. Especially in the employment field, discrimination based on age is cruel and self-defeating; it destroys the spirit of those who want to work and it denies the Nation the contribution they could make if they were working."

--The President followed up his commitment to eliminate age discrimination with transmittal by the Secretary of Labor to Congress of legislation to extend the Age Discrimination in Employment Act to employees of State and local governments.

--The President has also taken affirmative action to bar age discrimination in Federal employment. He told the Congress, "I will also send a directive to the heads of all Federal departments and agencies reaffirming and emphasizing our policy that age shall be no bar to a Federal job which an individual is otherwise qualified to perform." This directive has been sent.

--Action has also been taken to end age bias in employment through enforcement activities and conciliation. Where voluntary compliance has not succeeded, enforcement actions have been taken. As a result of formal investigations, the amount of wage underpayments owed because of age bias has doubled over the last two years. The accelerating pace of the enforcement program is further illustrated by the fact that 120 actions have been initiated by the Secretary of Labor under the Act, 66 of which were filed during Fiscal Year 1972.

--As an essential part of The Age Discrimination in Employment Act (ADEA) compliance effort, the CUE (Compliance Utilizing Education) program has been initiated. Under this program, company officials are trained by Employment Standards Administration representatives to assure compliance with applicable laws, including the Age Discrimination in Employment Act (ADEA).

OPPORTUNITIES
FOR INVOLVE-
MENT (Cont'd)

During the past Fiscal Year, press releases and nontechnical bulletins concerning the Age Discrimination in Employment Act (ADEA) were widely distributed. Other Administration activities to combat job bias have included television and radio announcements, production of a half-hour public service film about age discrimination, and sponsorship of a series of age discrimination conferences.

Through these actions, this Administration has thus moved aggressively to end age bias in employment.

- o The Department of Labor is assisting middle-aged and older workers in their transition from forced job displacement into suitable jobs or retirement.

Many persons in these age groups have received a variety of public employment services including unemployment compensation, employment counseling, and referral to training and employment, and will continue to receive them under several Departmental programs.

Each State employment service has a State Supervisor of Services to Older Workers, who is responsible for guiding the program of service to the elderly. And each local office has an individual who is specifically responsible for seeing that older applicants receive needed service and for giving direct assistance to them.

Additionally, the Department of Labor has a contract with the National Council on the Aging to provide technical assistance and training to increase the general knowledge and practical skills of employment service personnel responsible for providing manpower service to older workers.

- o This Administration is opening up employment opportunities for older workers.

The President has a special interest in creating new job opportunities for persons 65 and over. In his Special Message to Congress he said, "It is important...that we help open employment opportunities for persons over 65."

--The President has demonstrated his determination to help those over 65 by doubling the amount of money for manpower programs for older workers.

The President told the Conference delegates that those projects "have demonstrated that older Americans can make valuable contributions in health, education, and community service projects even as they earn additional income."

OPPORTUNITIES
FOR INVOLVE-
MENT (Cont'd)

- The President also directed the Secretary of Labor to urge States and communities to hire persons over 65 under the Emergency Employment Act, a temporary two-year program to hire about 150,000 people each year in public services.
- In addition, the President asked the Labor Department to work with public employment service offices to open job opportunities for those over 65, including part-time job opportunities, both in the public and private sectors.
- The Office of Economic Opportunity, through its Senior Opportunities and Services (SOS) programs also has carried forward a manpower program to enable the elderly to earn more income.

Under the plans developed for the termination of OEO, grants for SOS programs may be extended for one year.

- The Administration on Aging has issued regulations for the new Nutrition for the Elderly Program which provide, as called for in the law, for employment preference for persons 60 and over.
- o This Administration believes that local governments should give full consideration to the use of available Federal funds, e.g., the Older Americans Act, the Adult Services titles of the Social Security Act and General Revenue Sharing to help older persons continue to be involved in society either through employment or voluntary service.

It believes that counseling, training and placement services which will help older persons to continue to be involved in life should be an integral part of these efforts. Special emphasis should be placed on making sure that communities open up opportunities for older persons who are members of minority groups.

- o The Administration supports the use of model project funds by the Administration of Aging (in conjunction with the Department of Labor) for demonstrations of employment services for older persons.

Such demonstrations can help determine what types of jobs meet the needs of older Americans effectively and demonstrate the potential of the manpower resources of persons over 65.

OPPORTUNITIES
FOR INVOLVE-
MENT (Cont'd)

- o The President has markedly expanded volunteer programs for the elderly administered by ACTION.

Not only is the Administration committed to providing employment opportunities for older Americans; it is also committed to involving older citizens actively as volunteers.

It is important that attention be given to the things our Nation should be doing for older Americans, but it is just as important to provide for continued opportunities to enable older Americans to contribute to their country's continued growth. Voluntary social action has long been recognized as one of the great characteristics of America, a force which has helped to unite our diverse people in the pursuit of common goals. And even as the voluntary spirit has helped our country move forward more effectively, it has also provided those who have volunteered for service with a great sense of fulfillment.

At the Conference, the President pledged to move successful volunteer programs from demonstration status to a broader national basis, an expansion effort that is rapidly moving forward.

- Pursuant to the President's request, the Congress voted to double the funding for the Foster Grandparents program.

This program, a part of Action, will enable 10,500 low income older persons to serve as Foster Grandparents to 21,000 children each day -- 50,000 children in all each year -- in some 435 child care institutions.

- At the same time, the President also asked for tripling ACTION agency funds for the Retired Senior Volunteer Program (RSVP) so that as many as 75,000 senior volunteers could be involved in community services. The Congress approved this request.

- In addition, the Administration has asked the Congress to enact legislation which would enable the Action agency to expand the Foster Grandparent Program authority so as to provide opportunities to older volunteers to provide supportive services to persons with exceptional needs in various settings, especially services to other older persons in nursing homes, their own homes, or other community settings.

OPPORTUNITIES
FOR INVOLVE-
MENT (Cont'd)

This expansion would build on the successful experience of the Foster Grandparent Program. Under the Foster Grandparent Program, older Americans, 60 years and older, are helping children with exceptional needs in hospitals, correctional institutions and other residential facilities for needy children. If the legislation proposed by the Administration is enacted, older volunteers could serve children with exceptional needs in other than institutional settings. The proposed legislation also would give older volunteers the opportunity to serve other older persons with special needs.

Another Action volunteer program is the Service Corps of Retired Executives (SCORE) through which business men and women counsel owners of small enterprises on areas such as sales, profits, production and record keeping. These retired volunteers now enrolled in 196 chapters across the Nation also provide management knowhow to non-profit community organizations and minority operations.

Other less fortunate members of society in America and throughout the world are being helped by elderly volunteers in two additional ACTION programs, VISTA and the Peace Corps. Apart from programs enlisting older Americans exclusively -- the Foster Grandparents Program, Retired Senior Volunteer Program, and the Service Corps of Retired Executives -- 10 percent of ACTION's volunteer force is comprised of persons age 60 and over.

- o The Administration is providing volunteer opportunities for Older Americans in other Federally-assisted programs.

Directly funded voluntary programs for older Americans, such as RSVP, Foster Grandparents, and SCORE, are one means of providing opportunities for involvement. A tremendous opportunity also exists to identify and coordinate the service opportunities available in Federally sponsored programs -- particularly in programs that serve older persons. Through proper placement, training and supervision, elderly volunteers render valuable service in Federal programs. They provide an important source of manpower while maintaining purpose and meaning in their lives. The following agencies are opening up opportunities for older persons to serve as volunteers.

--The Social and Rehabilitation Service (SRS) of the Department of Health, Education and Welfare, in cooperation with the American

OPPORTUNITIES
FOR INVOLVE-
MENT (Cont'd)

Nursing Association, is promoting volunteer services for the elderly. SRS is also planning ways in which the aged deaf can be trained for community services to deaf children and adults.

--The Veterans Administration provides volunteer opportunities for the elderly in more than 25 services in its medical program. It is estimated that over 50 percent of a monthly average of over 112,000 volunteers fall into the elderly category. The VA considers them to be the backbone of its volunteer force.

- o The Office of Education and the Inter-Agency Council on the Arts and Crafts are working on a five-year plan to help the elderly fill their leisure time with creative activities.

Under this program, craft centers would be established at State and regional levels where both the young and the elderly could be instructed in traditional arts and crafts. Senior citizens would be employed as teachers, thus assuring not only enrichment of their own lives, but guaranteeing that traditional skills will be passed along to future generations.

Planning is also underway for establishment of a National Academy for the Arts and Crafts where gifted senior craftspeople could instruct youth in the centuries-old skills centered in the Appalachians, as well as in the Spanish and Indian cultures. In addition, State aging agencies are being encouraged to examine resources in the arts available in their communities in order to provide new approaches to reduction of isolation. As a result of an Administration on Aging grant to the National Council on the Aging, a prospectus was developed to provide those working with the elderly, the arts community, and older people themselves with a greater awareness of the potential of arts programs for enriching the lives of the elderly.

- o The Administration has taken steps to improve coordination among the many non-Federal volunteer activities which affect the aging.

The Administration on Aging has enlisted the cooperation of the National Center for Voluntary Action to provide staff assistance to 138 national voluntary organizations committed to improving in-home services for older persons in at least 300 communities. These services can oftentimes be rendered most effectively by older persons.

EDUCATIONAL
OPPORTUNITIES

Summary of Conference Recommendation: The delegates recommended a number of actions be taken in the area of educating the elderly. Their recommendations were directed toward two goals -- education for personal fulfillment and education to meet the needs of later life -- which they saw as goals for all older persons including those who, for a variety of reasons, are less likely to respond voluntarily. To afford such persons educational opportunities, an active outreach campaign was recommended.

The Section on Education and the Section on Retirement Roles and Activities were particularly concerned that older people be instructed about the "worthy use of leisure time." The Special Concerns Sessions on the Elderly Indian and Youth and Age also noted the need for such instruction. Additional Sections felt that education or training for second careers in community service would be useful to both the elderly and to society.

The need for education for the elderly directed toward individual personal fulfillment was expressed more by Special Concerns Sessions than by subject matter sections. It was recommended that opportunities in formal education be made available through programs of continuing education and that these opportunities be accompanied by efforts to eliminate barriers to the availability and accessibility of educational service for older persons, through flexible hours, convenient locations, free tuition, stipends, and subsidized transportation. A majority of the delegates to the Education Section recommended that the public libraries be strengthened and used as a primary community learning resource and that the Library Services and Construction Act be amended to include an additional title to provide library services to older people. Two Sections and one Special Concerns Session noted that such opportunities would present an ideal vehicle to bring the old and the young together to learn with and from each other.

An increase in the educational opportunities for older people will require increased financial support. The majority of the delegates who participated in the Educational Section supported the recommendation that such opportunities be given a high priority throughout all services to older people and that the public sector fund educational opportunities in proportion to the number of elderly in the total population. They additionally asked for Federal, State and local support of bi-lingual/bi-cultural education for non-English speaking elderly.

EDUCATIONAL
OPPORTUNITIES
(Cont'd)

Administration Response: The Administration believes that community level plans to develop comprehensive and coordinated services to older persons should include plans for expanding educational opportunities.

In conformity with this belief the following steps have or will be taken:

- o Guidelines furnished the States under the Older Americans Act will provide that due consideration be given to educational services in the planning of coordinated and comprehensive service programs for older persons.

A portion of these funds for the support of services for older persons can and should be utilized to open up the doors of continuing education for older persons -- doors that are shut in far too many communities of the Nation.

The Administration on Aging has made a start in this direction by making a grant to the Adult Education Association for a comprehensive inventory of opportunities provided for older people by public school, university extensions, agricultural extension, and other adult education agencies. The grant provides, also, for an inventory and evaluation of the literature relative to education for older Americans. It is expected that these activities will stimulate significant expansion of educational programs for middle-aged and older people.

The Adult Education Association will be concerned with pre-retirement, consumer, cultural, health, vocational, and avocational education.

- o The Administration supports the use of the Administration on Aging model project funds to inaugurate, in coordination with the Office of Education, demonstration projects designed to establish continuing education projects for older persons.

These model projects will be designed to show how making educational opportunities available for older persons can result in their being prepared for paid or volunteer services in the community, for a meaningful use of leisure time, and for personal fulfillment. In short, such projects can show how to help older persons achieve their greatest potential. These projects will also be designed to show how educational services can become an integral part of coordinated and comprehensive programs for older persons.

EDUCATIONAL
OPPORTUNITIES
(Cont'd)

- o The Administration will pursue a policy of encouraging States, local school districts and institutions of higher learning, where appropriate, to utilize a larger proportion of Federal funds allocated to them, including vocational and adult education funds, to provide older persons with educational opportunities.

In most Federal educational programs older persons participate to the extent that recipient local school districts or institutions of higher education decide to utilize Federal funds for education of the aging. These decisions have often reflected the same tendency that is manifested in other segments of society, namely, to relegate the older person to an inferior or secondary position. The Federal government can and should provide the leadership which may bring about a change in this attitude. This change can best be encouraged by the development of model projects which work and by intensified communication between Federal and State education agencies to ensure the serious consideration of the needs of older persons in the allocation of educational resources.

- o The Assistant Secretary for Education will personally urge chief State school officers to give more consideration to the needs of older persons in the formulation of programs which utilize Federal resources.
- o The Veterans Administration (VA) is actively engaged in education programs benefiting the elderly.

An estimated 247,000 women, many of them widows over age 65, are eligible for VA educational benefits. Eligibility is for a maximum of 36 months schooling, and is for widows of veterans who died of service connected disabilities or wives of veterans who are permanently and totally disabled from service connected disabilities. Optional vocational and education counselling is provided to help these women choose courses compatible with their abilities and interests, thus making VA schooling a valuable tool for older Americans. One example is a recent VA assisted "graduation class" of 13 women in their 70's and 80's who completed courses in Spanish and current events at a New York City community college.

TRANSPORTATION -
PROVIDING
MOBILITY

Summary of Conference Recommendations:

The delegates to the 1971 White House Conference on Aging emphasized the social, emotional, and physical needs for increased mobility for older people.

Recommendations to improve transportation for the elderly divided into two categories: 1) developing individualized, more flexible forms of transportation which provide increased access to needed services, and 2) making fixed systems more responsive.

With regard to developing more flexible forms, several suggestions were offered:

It was recommended by a majority of those delegates who participated in the Section on Transportation that all "publicly funded programs for the elderly shall be designed so that transportation will be required as an integral part of these programs." The Section on Education, the Section on Nutrition, and nine Special Concerns Sessions expressed the same or similar concerns.

It was recommended by the Transportation Section that all government passenger vehicles in use by Federal, regional, State, county, and city programs be made available interchangeably among agencies to transport all older persons being served by their programs, including members of minority groups, and that local clearinghouses be established for this purpose. This recommendation was echoed by two Special Concerns Sessions.

It was also recommended that incentives be provided individuals to serve as volunteer drivers for older persons, one such incentive being Federal liability insurance for volunteer drivers.

With regard to adapting fixed transportation systems to the needs of the elderly, the Section on Transportation called for architecturally barrier-free transportation systems. To achieve this objective, the Section recommended Federal standards for the design of facilities and equipment to take account of the safety, comfort and convenience requirements of both the handicapped and the elderly. In addition, the Section called for Federal guidelines for the development of improved ancillary services such as centralized transit information and crosswalk markings. The Special

TRANSPORTATION -
 PROVIDING
 MOBILITY
 (Cont'd)

Concerns Session on Aging and the Aged Blacks called for time schedules and routing responsive to the needs of the black aged, while the Session on Spanish-Speaking Elderly called for the expression of transit information in Spanish. The Section on Transportation noted that improved ancillary services are of concern to the elderly not only as users of fixed systems, but also as drivers and pedestrians.

Other recommendations in support of more responsive fixed systems called for coordination of transportation with programs for the elderly. One illustration of such coordination which the Section on Transportation called for is the incorporation of transportation considerations into planning for privately funded housing for the elderly.

The Section on Transportation called for Federal funding to improve transportation services for older persons, services made available both through fixed systems and more individualized systems. A major recommendation urged increased Federal support for public transportation for all users, with special consideration for the transportation of the disadvantaged.

One means of providing increased Federal support recommended by the Transportation Section was the conversion of the Highway Trust Fund into a General Transportation Fund for all modes of transportation, with part of this new Fund set aside for the development of new, and improvement of existing, transportation services for the elderly. Other recommendations set forth the same principle: that the granting of transportation subsidies should be conditioned to accomplish program objectives such as the coordination of all forms of transportation.

Of particular concern was the situation of rural elderly and the extreme situation presented by elderly Indians who reside on reservations. The majority of those delegates who participated in the Transportation Section supported the recommendation that responsibility be specifically assigned within the Department of Transportation for improving rural transportation. The Section also recommended that the Federal government support transportation services where State and local efforts prove unsatisfactory as on Indian Reservations which are not eligible for existing or proposed State funded transportation services. The Section also suggested the possibility of direct subsidies to the elderly who reside in areas inadequately served by

TRANSPORTATION -
PROVIDING
MOBILITY
(Cont'd)

public transportation. Some form of Federal financing to meet the transportation needs of persons residing in rural areas was called for by the Session on the Rural Elderly.

The Section on Transportation and several Special Concerns Sessions recommended the reduction in the fares paid by older persons in some or all modes of transportation.

Administration Response: The Administration has given high priority to developing full access for the elderly to transportation in order to assure that older Americans can participate fully in community life and receive urgently needed services.

As a result of this priority, the following steps have been or will be taken:

- o The President, in keeping with his announcement at the White House Conference on Aging, has directed that all Federal grants which provide services for older persons also "ensure that the transportation needed to take advantage of these services is available."

Consistent with this directive and the law itself the regulations issued by the Administration on Aging under the law establishing the Nutrition Program for the Elderly require that States must plan for a transportation component to assure that older persons have access to food and nutrition programs supported by Federal funds.

The Administration on Aging, the Community Services Administration, and the Rehabilitation Services Administration operate programs for which existing or proposed legislation authorizes the provision of transportation in connection with other services available to older persons.

Federal funds made available to States and communities under General Revenue Sharing can likewise be utilized to provide transportation services.

In brief, the President's directive, plus the availability of the funds identified above, should help to insure the inclusion of transportation as a major component of comprehensive and coordinated service programs for older persons in many communities of the Nation.

- o The Secretary of Health Education and Welfare has directed that guidelines be developed to assure that transportation is included in the State plans that would be required under the proposed amendments to Title III of the Older Americans Act.

These new guidelines would require States to plan for transportation when they use Federal funds to help provide needed services to older persons.

TRANSPORTATION-
PROVIDING
MOBILITY (Cont'd)

- o The Administration on Aging is working with the Department of Transportation to develop joint transportation demonstration projects.
The projects will seek to evaluate alternative means of expanding and adapting transportation to increase older persons' access to community services.
- o The Administration supports the use of Administration on Aging model project funds for the development of methods and programs, in coordination with the Department of Transportation, to determine the most effective ways of increasing the mobility for older persons.
- o The President has proposed that funds now in the Highway Trust Fund be used by States and localities to expand resources in the mass transportation area, a step that could result in the provision of greater mobility for older persons.

The Secretary of Transportation, at the request of the President, proposed legislation to the Congress to realize this end and is prepared to act on this matter once the legislation is enacted.

In his Special Message on Aging, the President, after referring to his request relative to the Highway Trust Fund stated: "I hope that the Congress will give prompt approval to this important plan. The flexibility it provides would allow state and local officials -- who know best the transportation needs of the elderly within their own jurisdictions -- to give special consideration to meeting those needs. I am asking the Secretary of Transportation to develop specific suggestions for assisting the States and localities in these undertakings."

- o The President, in his Special Message on Aging, also stated that the Department of Transportation stood "ready to give priority attention to community requests for helping Older Americans through capital grants from the Urban Mass Transportation fund and is willing to commit significant resources to this end. I urge the State and localities to move immediately to take advantage of the resources."

Subsequent to this action, the Secretary of Transportation sent a letter to all Governors and to the mayors of major cities urging them to take advantage of these available funds.

TRANSPORTATION -
PROVIDING
MOBILITY
(Cont'd)

- o The Urban Mass Transportation Administration within the Department of Transportation has issued new guidelines for applicants for capital grants which require that the transit plan submitted with applications include consideration of the service needs of the elderly.

In order to assist applicants in this regard, the Urban Mass Transportation Administration has also developed a set of simple and inexpensive analytical techniques which can be utilized by local governments in defining the mobility problems of the elderly in a given area and assessing the impact of a proposed capital grant project on them.

- o The Federal Highway Administration is encouraging States to include specific aids for the elderly and handicapped in all rest areas and tourist facilities.

Approximately 330 areas are now operating which are free of physical barriers. Information has been distributed urging the States to provide curb cut ramps at street intersections, where practical, to minimize the mobility problems of handicapped and elderly people.

- o Airlines and operators of air terminals are cooperating with the Federal Aviation Administration to meet the unique problems of the aged in this area of public transportation.

Procedures are being explored to facilitate passenger processing at the terminals. These include automated procedures and directional signs, standardized for easy comprehension, and which are of special benefit to travelers advanced in years or handicapped.

- o The use of volunteers in Drive-to-Serve projects is being encouraged by the Department of Agriculture in its food assistance out-reach efforts.

Through the Expanded Food and Nutrition Program conducted by youths in the cooperative extension programs, package-carrying services for the elderly and handicapped are provided in some urban areas. In some other urban areas, 4-H youth are serving as personal shoppers for the elderly who have food stamps. Providing transportation for the elderly is a volunteer service that many Extension Homemakers Club members provide.

TRANSPORTATION-
LICENSING AND
INSURING

Summary of Conference Recommendations:

It was recommended that the Federal and/or State governments enforce a prohibition against age discrimination in licensing and insuring procedures for private transportation. The delegates additionally asked for legislation to prohibit insurance companies from increasing automobile insurance premiums or cancelling policies on the basis of age alone.

Some controversy surfaced when possibilities for governmental involvement in private transportation insurance were suggested. A majority of the Transportation Section supported exploration of the concept of no-fault insurance, government operated insurance programs, and other experimentation aimed at improved insurance programs. A minority of the Section was opposed to the possibility of government operated insurance programs.

Administration Response: The Administration concurs with the delegates to the White House Conference on Aging that all levels of government must review their laws and policies to prevent application of licensing and insurance procedures in such a manner as to jeopardize the mobility of the elderly.

In support of this goal, the following actions will be or have been taken:

- o The Administration has endorsed no-fault insurance and has urged State -- rather than Federal -- action.

Despite ever-increasing premiums for automobile insurance, the victim of accidents frequently receive inadequate compensation and usually experience harmful delays in the courts. The best-known alternative to this inefficient and inequitable reparation system is the "no-fault" automobile insurance concept -- which provides, in general, that an accident victim's losses are covered by his own insurance company no matter who caused the accident. Direct Federal action in the insurance area has not been encouraged because of the Administration's basic belief that the functions of government should be kept as close to the people as possible.

Partially funded, in part by the Department of Transportation, a special committee of the National Conference of Commissioners on Uniform State Laws drafted a Uniform Motor Vehicle Accident Reparation Act which was recently adopted by the full Conference for promulgation as a uniform law. This measure, a very substantial no-fault automobile insurance law, will, therefore, be placed before the legislatures of all States for consideration by them.

TRANSPORTATION-
LICENSING AND
INSURING (Cont'd)

- o The Administration has initiated action to encourage the use of school buses to transport older persons so that they may take advantage of available community services.

The Secretary of Transportation has held joint discussions with the Office of Management and Budget and the Department of Health, Education and Welfare to explore the problem of liability insurance. Possible courses of actions growing out of these discussions include (1) encouraging the states to help obtain adequate insurance for school buses used to transport the elderly, where bus can be used effectively for this purpose, (2) utilization of HEW programs to assist paying for part or all of these insurance costs where appropriate, (3) development of cooperative HEW-DOT research and demonstration programs to ascertain the limitation of and opportunities provided the elderly by school bus utilization for transportation. Steps are now being taken to develop plans to implement one or more of these possible courses of action.

- o The President has further encouraged the National Highway Traffic Safety Administration to establish drivers license standards which States must adopt to be eligible for Federal funding under the Highway Safety Act of 1966.

These standards do not discriminate against the aged on the basis of age, but require only that certain standards of driving performance are met.

SENIOR
CENTERS

Summary of Conference Recommendations:

The Retirement Roles and Activities Section was supported by the Session on the Asian Elderly in calling upon the Federal government, in cooperation with other levels of government, to fund the construction and operation of multi-purpose senior centers. This section went on to suggest that industry, labor, and voluntary and religious organizations should play a role in the planning and implementation of such centers. The Special Concerns Session on the Poor Elderly spoke of the responsibility of the Federal government to establish a public senior service system for each community.

Other Conference groups that dealt with the need for senior centers focused on the service role that such agencies could play. The Facilities, Programs and Services section saw multi-service centers as neighborhood vehicles 1) for the delivery of supportive, preventive, and protective services and 2) for linking older persons to such services. The Section on Spiritual Well-Being also viewed senior centers as channels for older persons to needed services as well as coordinating agents for all locally available services to older people. Similar views were expressed by the Session on the Religious Community and Aging.

SENIOR
CENTERS
(Cont'd)

Administration Response: The Administration agrees with the conviction of the Conference Delegates that greater emphasis should be given to the establishment of community level facilities to provide services for the elderly.

The Administration believes that local governments should give full consideration to the use of available Federal funds--e.g., the Older Americans Act, the Adult Services titles of the Social Security Act, General Revenue Sharing and the proposed Better Communities Act--to make Senior Centers and the services provided through them available to a greater percentage of older persons.

The HUD community development programs which in the past have supported projects of interest to the elderly -- notably the Neighborhood Facilities Program--are being terminated and will be replaced under a proposed Better Communities Act with a new system of community development revenue sharing. Under this program, communities will be able to carry out all the types of activities previously authorized under the categorical programs, but they will be able to secure funds far more quickly, without Federal red tape or matching requirements, and will be able to use those funds more flexibly in providing a broad range of facilities, including centers for senior citizens. During the transition period, the Federal government will continue to honor commitments already made and activity out of undisbursed obligated balances is expected to remain at least equal to 1972.

CONSUMER
PROTECTION

Summary of Conference Recommendations:

The delegates who participated in the Facilities, Programs and Services Section and the Elderly Consumer Special Session asked for additional regulation of the market place with emphasis on greater action by governmental agencies.

The Facilities Section of the Conference recommended governmental controls through the enactment and enforcement of legislation and that governmental establishment and support of consumer advocate agencies become the primary means of protecting the consumer. It suggested, however, that government controls had to be substantially augmented by the participation of consumers, as well as representatives of industry, business, and the professions.

To fulfill the government's role in consumer protection, the Facilities, Programs and Services Section recommended that a central Federal Consumer agency be established with responsibility of coordinating the efforts of the various Federal agencies engaged in consumer protection. This consumer Session suggested, should have the authority to serve as an advocate of the consumer in both individual and class actions before Federal agencies, Federal officials and Federal courts.

CONSUMER
PROTECTION
(Cont'd)

This session further recommended that a consumer representative be added to the Cabinet Committee on Aging, and that Federal, State and local governmental agencies which deal with consumer affairs should designate a staff member to take particular responsibility for consumer problems of the older people.

The Special Concerns Sessions on Long-Term Care and the Elderly Consumer recommended new legislation in the area of insurance where they called for more stringent regulations regarding private health insurance. The Elderly Consumer Session further endorsed the no-fault type of automobile insurance. The delegates who participated in the Transportation Section also supported this change in auto insurance. In the area of product safety, the Elderly Consumer Session asked for governmental regulations to keep unsafe drugs, goods, cosmetics, and other products off the market. The delegates were further concerned about professional fees, supplying adequate information on all packaging, prescription and over-the-counter drugs, a rejection period for contracts made with door-to-door salesmen, and the dispensing of physical therapeutic devices and appliances. The Housing Section pointed out the need for legislation to safeguard the elderly property owner or purchaser from unscrupulous real estate developers and/or promoters.

Another thrust of the Conference's concern with consumer-protection centered around adequately informing and educating the elderly consumer to the dangers in the marketplace. The Sections on Nutrition and Education and the Sessions on Aging and Aged Blacks, Legal Aid, and the Elderly Consumer strongly recommended such programs, with the latter suggesting that the broadcasting industry should be called upon to air informational and educational programs about consumer needs of the elderly.

Attention was also given to the matter of dietary standards. The Section on Nutrition urged that Federal action be taken to establish and enforce high standards for food and nutritional services provided to the elderly by institutions and agencies benefiting from Federal funds. The Section recommended that standards should be formulated in areas such as quality and nutritional values, special diets, nutritional counseling, food handling, preparation and serving of meals.

The Section further recommended that: the food industry assume responsibility for providing quality food; and the Federal government establish and enforce necessary standards and make support available to States to establish, implement, and monitor standards that meet or exceed Federal standards.

The Elderly Consumer Special Concerns Session said that packaged consumer commodities should be priced on an easily understood per unit basis and that manufacturers should be required to include the appropriate vitamin content, caloric count and ingredient listing on all packaged foods.

CONSUMER
PROTECTION
(Cont'd)

Administration Response: The Administration agrees with the Conference delegates that all levels of governments should expand consumer protection and education -- especially in regard to the unique problems of the elderly.

The Administration has taken and is taking a number of steps, through organizational changes, legislative recommendations, and administrative actions, designed to protect the American consumer in general and the older consumer in particular.

- o The President has strengthened consumer advocacy at the Federal level by:

- Creating an Office of Consumer Affairs in the Department of Health Education and Welfare with a mandate to intensify efforts on behalf of the consumer with special emphasis on programs to assist the older consumer.

The Director of the Office of Consumer Affairs, who also serves as Special Assistant to the President for Consumer Affairs, has in turn appointed a special assistant with primary responsibility for programs concerning the elderly consumer.

- Appointing the Director of the Office of Consumer Affairs to the Domestic Council Committee on Aging.

As a result the interests of the older consumer will be served within the body which advises the President on all matters related to older persons.

- Appointing the Director of the Office of Consumer Affairs a full member of the Cost of Living Council, the cabinet-level body which sets the policies for the wage-price stabilization program.

This assures that consumer's voice is heard at the highest level of decision-making in the crucial efforts to combat inflation.

- o The President has proposed the Medical Device Safety Act which would establish mandatory safety standards for potentially hazardous devices and require those devices used in life-threatening situations to be approved for safety and efficacy before they are marketed.
- o On October 27, 1972 the President signed the "Consumer Product Safety Act" which contained many of the proposals featured in the Administration's bill. This bill will establish a new Consumer Product Safety Commission with authority to ban hazardous consumer products which cannot be made reasonably safe by development of standards.

CONSUMER
PROTECTION
(Cont'd)

- o The President has urged the Office of Consumer Affairs in conjunction with other Federal agencies, to develop programs of special interest to the elderly, including the following:
 - Real property transactions. The President has asked his Special Assistant for Consumer Affairs, in cooperation with the Secretary of Housing and Urban Development, to develop a program for helping to enforce the Interstate Land Sales Full Disclosure Act by fostering greater awareness among older citizens of their legal rights in real property transactions.
 - Consumer education curriculum for the elderly. The Office of Consumer Affairs is publishing guides for the consumer education of adults, with a section directed towards the needs of the elderly. In connection with this project the Department of Health, Education and Welfare is cooperating in developing a program of technical assistance helping the States create consumer education projects specially designed for the older citizens. The Bureau of Adult, Vocational and Technical Education plans to request proposals for curriculum development in consumer education with the aged as a major target group. Consumer and homemaker education courses are now being provided for the elderly on a limited basis at the local level.
 - No-fault insurance. The Office of Consumer Affairs has been one of the leading advocates for state action on no-fault insurance.
 - Cosmetic ingredient labeling. The Office of Consumer Affairs has vigorously advocated voluntary ingredient labeling of cosmetics. Recently, the Food and Drug Administration set forth an approved format for voluntary ingredient labeling. This action has removed a major obstacle cited by the industry, and now a voluntary labeling program by manufacturers is proceeding.
- o A number of Federal departments and agencies produce information guides and literature which can be a considerable help to older persons.
 - The Office of Consumer Affairs publishes a twice-a-month newsletter, Consumer News, which provides notices on hearings, proposed and final rules and orders concerning consumer interests, as well as easily readable "translations" of technical information dealing with Federal agency actions which might affect consumers. This enables the elderly consumer to know exactly what is being proposed and how to make

CONSUMER
PROTECTION
(Cont'd)

his voice heard regarding the proposals. The Office of Consumer Affairs encourages and assists State and local governments in the promotion and protection of consumer interests and has just published State Consumer Action - 71, the first reference book on consumer activities by State and local governments.

- The Food and Drug Administration has published Consumer Guide for Senior Citizens which warns against specific types of deceptive practices in the marketplace.
 - The Federal Trade Commission has available a consumer bulletin entitled Mail Order Insurance that may be of assistance in protecting unwary elderly consumers from victimization by unscrupulous insurance agents.
 - The General Services Administration makes available the Consumer Product Information Index which lists selected Federal publications dealing with how to buy, and use consumer products. It also has issued a publication, Brand Names Identical to Products Purchased and Tested for Use By the Federal Government.
 - The U.S. Department of Agriculture, through its extension home economists tries to reach older Americans before and after retirement with programs about family budget planning. Two Department of Agriculture publications available from the Government Printing Office are A Guide to Budgeting for the Retired Couple (10¢) and Family Food Budgeting (15¢).
- o The Administration has taken several actions to protect elderly consumers in the area of nutrition standards.

Nutrition standards are of special concern to the elderly since an adequate diet is essential to maintaining good health.

The President has signed into law and requested \$100,000,000 to fund the Nutrition Program for the Elderly (Title VII Older Americans Act). The Administration on Aging has developed program guidelines which set forth minimum nutrition standards for local projects sponsored under the program. This is to insure that consumers receive meals that meet their particular dietary needs and meet their nutritional requirements.

CONSUMER
PROTECTION
(Cont'd)

The Community Health Service is working closely with the Social Security Administration to strengthen dietetic service standards for hospitals and extended care facilities under Medicare. The Service is also assisting the Department of Housing and Urban Development draw up dietary guidelines for residents in congregate housing for the elderly, handicapped and ailing.

In order to promote efficiency and effectiveness of nutritional activities, the Center for Disease Control has been given lead agency responsibility for assuring the inclusion of nutritional programs where necessary in medical care programs administered by the Health Service and Mental Health Administration. This agency has been working with the Department of Agriculture in planning better ways to monitor and evaluate the effects of food distribution on health and nutrition.

Various research and demonstration projects underway in the area of nutrition should benefit the aged. To improve nutritional teaching in medical schools the Center for Disease Control is now working on curriculum development with deans of various training institutions.

- o The Office of Consumer Affairs has encouraged food-chain stores to take positive action in the areas of unit pricing, nutritional labeling, and open dating.

Under the direction of the President, the Office of Consumer Affairs has, for many months, been urging food chains to initiate unit pricing in their outlets. It can now be reported that most of the large and medium sized chain food stores have voluntarily adopted unit pricing. Several States and cities have enacted tough legislation in this area.

Likewise, at the urging of the Office of Consumer Affairs, manufacturers and retailers may adopt standard nutritional labeling and open dating (i.e., date when a commodity should no longer be offered for sale). A study on the feasibility of requiring open dating is underway in the Department of Health, Education and Welfare.

LEGAL
PROTECTION

Summary of Conference Recommendations: The recommendations regarding legal protection were of three kinds; recommendations for legal services for the elderly, recommendations for law enforcement protection of the elderly, and recommendations concerning the civil liberties of the elderly.

Three groups spoke of a need for a full range of legal service including advocacy, administrative reform, litigation, and legislation. It was further recommended by each of these three groups that there be a joining of public and private resources in the effort to supply adequate legal services to older people. Two of the three, the Section on Facilities,

Programs and Services and the Special Concerns Session on Legal Aid requested more participation (1) by the Bar Associations in providing legal services to the elderly and (2) by the law schools and research institutes in providing research findings to older people.

Both groups requested programs to train older people to function as lay advocates and legal para-professionals who could perform advocacy roles for older people.

Both groups also strongly recommended that Congress establish an independent legal service corporation which would make legal services available to older people at no cost or at rates that they can afford. They further recommended that older persons have a fair share in the direction of such a corporation.

The Special Concerns Session on Legal Aid and the Urban Aged recommended that all Federal and State programs should be required to notify all elderly persons who have received unfavorable benefit decisions that they have the right to legal representation and that seeking such representation is advisable. It was further recommended that the benefit programs provide for the payment of legal fees in such cases from sources other than from the benefits to which the elderly person is entitled.

Recommendations regarding the protection of the person and property of the elderly were presented by the Section on Facilities, Programs and Services and the Section on Housing and the Special Concerns Sessions on Legal Aid, the Urban Aged, and Aging Blacks. These recommendations dealt with assisting the elderly to participate in the criminal justice system and with the prevention of both white collar crimes such as fraud and the crimes of violence as assault and robbery. These recommendations included: making physical protection and crime prevention an element of the planning of facilities for the elderly; expanding police protection of minority neighborhoods; establishing formal liaison between social service agencies and police departments so that elderly who are victims of crime can obtain all necessary assistance; providing better street lighting; making training grants available to police officers and others to acquaint them with the special situation of the elderly and their special susceptibility to particular types of crime; and granting Federal funds to State and local prosecuting officials and police officers to expand or establish trained fraud units which are well acquainted with schemes used to deceive the elderly.

LEGAL
PROTECTION
(Cont'd)

The delegates in four Sections and six Special Concerns Sessions recognized that the elderly are uniquely subject to infringement on their civil liberties. These groups recommended that protective measures be developed for those persons in the community who are unable to manage their own affairs because of impaired mental and/or physical functioning.

The Sections on Facilities, Programs, and Services Government-Non-Government Organization; and Spiritual Well-Being and several Special Concerns Sessions insisted that the basic rights and freedoms enjoyed by every citizen be ensured for the elderly. They insisted that older persons be free to manage their own affairs; to reject unwanted aid; to participate in government sponsored programs without the threat of discrimination by race, creed, nationality, or age; to associate with whom they please; and to express their thoughts.

Along with the pleas for self-determination for older people, the Section on Spiritual Well-Being and the Special Concerns Session on Youth and Age pointed out the need to establish the individual's legal right to choose to die naturally and with dignity, avoiding prolonged illness, pain, and confinement.

A variety of mechanisms were suggested to provide protection of the basic rights of the elderly. The Section on Physical and Mental Health recommended that Congress appoint a nationwide interdisciplinary committee made up from both the public and private sectors to determine the scope and type of needed intervention procedures and protective services. One possible form of such procedures and services for which the Section recommended more study was the institution of nationwide ombudsman services. The Section on Spiritual Well-Being and the sessions on the Religious Community and the Aged and on the Spanish-Speaking Elderly recommended that religious institutions take a strong and active role in the affirmation and protection of the basic rights of the elderly. The Special Concerns Sessions on Rural Older People and Legal Aid and the Urban Aged proposed that expanded programs to provide legal services, including free attorneys of their own choosing, would offer the necessary safeguards.

Administration Response: The Administration agrees with the delegates to the White House Conference on Aging that the provision of legal services, law enforcement and the protection of the civil rights of the elderly are essential to assuring the independence and dignity of older persons.

LEGAL
PROTECTION
(Cont'd)

This Administration is actively pursuing a number of courses designed to assure that legal protection for the elderly is provided and that the resources of the Federal government dedicated to law enforcement are made available to combat crime which so greatly affects all citizens...especially the elderly.

- o The Administration believes that legal services should be included as part of a comprehensive and coordinated service program for older persons as they are developed at the community level.

As pointed up in other parts of the report, major attention must be focused on the development of comprehensive and coordinated services for older persons at the community level. Such "service packages" can be financed by the use of a combination of funds from both the public and private sectors at the local level, from State funds, and from Federal funds including those under the Older Americans Act, the Adult Services provisions of the Social Security Act and General Revenue Sharing.

It is important that legal services be included in these packages of services. In this manner, help can be given older persons in the protection of person and property to which they are entitled under the laws of the land. Special emphasis can and should be placed on the protection of their civil liberties.

In the development of these legal service programs, consideration should be given to the use of older persons both as lawyers and as assistants to the members of the legal profession.

- o The Administration will shortly propose legislation to establish a legal services corporation.

In his Human Resources Message, of March 1, 1973, the President stated: "The time has come to institutionalize legal services as a permanent, responsible

LEGAL
PROTECTION
(Cont'd)

and responsive component of the American system of justice. I shall soon propose legislation to the Congress to form a Legal Services Corporation constituted so as to permit its attorneys to practice according to the highest professional standards, provided with safeguards against politicization of its activities and held accountable to the people through appropriate monetary and evaluation procedures."

In the development of the proposal for submission to Congress and in its implementation upon enactment, consideration will be given to the needs of older persons.

- o The Administration on Aging made a grant to the National Paralegal Institute of Washington, D.C. for preparing a curriculum to train older persons as paralegal assistants for work in neighborhood legal centers. It is expected that the curriculum will be used in community and junior colleges so that paralegal personnel can be trained throughout the country.
- o The Law Enforcement Assistance Administration is moving to reduce crime -- particularly for residents of public housing and to pinpoint the crimes experienced most often by older persons.
- The Law Enforcement Assistance Administration sponsors a number of programs geared broadly to reduce crime, including block grants to the States, and discretionary and research projects.

This policy is based on the belief that while the special security problems of senior citizens can often be addressed categorically through specific programs, the ultimate safety of the aged from criminal assault can be assured only when all segments of the population are liberated from both the fear and the fact of crime.

- The Law Enforcement Assistance Administration has approved ten discretionary grants to localities totaling more than \$1.1 million in Federal funds to increase internal security in housing projects.

Reduction of crime in elderly housing is one area in which the agency's programs are expected to have a significant impact. The types of projects instituted through these discretionary

LEGAL
PROTECTION
(Cont'd)

grants include special internal police patrols, police-tenant cooperative security programs, resident civilian security patrols, and surveillance and monitoring equipment purchases.

Internal security patrols, integral parts of the programs, provide visible and frequent reminders to the senior citizens that protection and assistance are close at hand. Housing directors report that the psychological value of these patrols is particularly effective in alleviating the fears of elderly tenants.

In addition to general benefits, the elderly Americans in some of the housing projects are receiving special services. In Springfield, Massachusetts, for example, security personnel make twice-a-day door checks for the aged and provide an errand service for disabled senior citizens. Security personnel have discovered a number of elderly tenants who had fallen unconscious and were in need of immediate hospitalization.

- The Law Enforcement Assistance Administration is also sponsoring a number of housing security research projects through the National Institute of Law Enforcement and Criminal Justice.

These studies are aimed at finding better ways of increasing on-grounds security and eliminating crimes committed inside large public housing projects.

- The Law Enforcement Assistance Administration and the Department of Housing and Urban Development are cooperating in an interagency effort to deal with security problems in public housing projects.
- The Law Enforcement Assistance Administration is presently conducting a nationwide survey to pinpoint crimes experienced most often by persons 65 years of age or older.

This information will help law authorities to more accurately gauge the specific needs of the elderly.

LEGAL
PROTECTION
(Cont'd)

--The broad purpose emergency communications system known as "911", serves as an aid to the elderly.

Financed with the help of the Law Enforcement Assistance Administration, the system has been adopted by 185 communities (as of January 1, 1972) and is proving an effective reporting system. In addition, the program provides for automatic switching to other service organizations when a caller needs other than emergency assistance.

INFORMATION
AND REFERRAL

Summary of Conference Recommendations: At least five major Conference Sections presented recommendations regarding the need to educate today's elderly to the programs and facilities available to them, and to help them understand and deal with the changes that are brought on by older age and retirement. The sections on Spiritual Well-Being, Physical and Mental Health, Nutrition, and Education emphasized this need, and suggested that such education could range from informal programs through the mass media to more formalized programs of instruction. It was further suggested by the Sections on Facilities, Programs, and Services, and on Spiritual Well-Being that the Social Security Administration take an active role in disseminating to all elderly information about all services that are available to them.

Administration Response: The Administration has been working to improve communications between the Federal government and older Americans and to alert the government to areas of special need.

The following steps have been taken:

- o The President directed the Social Security Administration offices to expand their information and referral services for the elderly.

Each of the 959 Social Security offices -- constituting the field network distributed throughout the nation -- is required to maintain a resource file of all community services, as well as information about state, county, and Federal programs. The Social Security Administration also has 3,500 sub-district contact stations.

With respect to Federal programs, each Social Security district office has been supplied with the "Catalog of Federal Domestic Assistance", and has been instructed regarding its use.

INFORMATION
AND REFERRAL
(Cont'd)

- o The President directed the Domestic Council Committee on Aging to examine ways in which to use other government offices -- such as the General Services Administration's Federal Information Centers and the Agriculture Cooperative Extension Service's local offices -- in further expanding and improving information and referral services.

The Administration on Aging with the cooperation of the Social Security Administration and Office of Economic Opportunity is conducting a statewide research and demonstration program in Wisconsin to test various information and referral sites, including four Social Security Offices, in terms of their effectiveness in meeting the needs of older persons.

The Office of Education's Bureau of Libraries and Learning Resources has funded research and demonstration projects in two branch libraries in five metropolitan areas--Atlanta, Cleveland, Detroit, Houston, and Queens Borough--to test the relevance of libraries as information centers in neighborhoods. A relationship between the library and statewide research and demonstration programs for interchange of findings has been established.

- o The President launched Project FIND -- a major outreach effort to identify older Americans who are "lost to society".

On August 3, 1972, a brochure describing Federal food assistance programs was mailed to roughly 21 million older persons. Both tapes and scripts of public service announcements were sent out to over 500 TV stations and to 600 radio stations throughout the country. A special Spanish radio announcement was distributed to stations in areas with large Spanish speaking populations. Posters encouraging eligible older Americans to enroll in the food assistance programs were distributed throughout the country for placement in locations frequented by the elderly and the poor. In addition, a nationwide volunteer network sought out these older Americans. (See "Nutrition Assistance", page 88).

MENTAL HEALTH

Summary of Conference Recommendations: Recommendations concerning improvements in the mental health care of older persons centered around three major themes. First, there were recommendations for improvements in the delivery of mental health services to older persons. These recommendations included proposals for the establishment and staffing of community-based mental health programs for the elderly located in a variety of community settings and designed to assure that older persons have ready access to appropriate treatment as they require it; the development of an adequate number of quality residential facilities; the provision of care to older persons suffering from mental illness in their own homes as long as medically possible; and the development of innovative

MENTAL HEALTH
(Cont'd)

therapeutic services to older persons currently institutionalized.

Also, the delegates asked for support for the ideal that the elderly have the right to receive mental health care in whatever form such care is made available to the general population and that care should be provided to all older persons without resort to a means test.

Secondly, proposals were made that social insurance provide the same coverage for mental health service as is provided for other health services. This equalization of coverage was recommended for comprehensive prepaid insurance, as under the Medicare and Medicaid programs.

Thirdly, the need for more Federal attention to the mental health problems of older persons was called for. To provide this attention, it was recommended that a Presidential Commission on Mental Illness and the Elderly be established and charged with implementing Conference recommendations in this area. A related recommendation proposed the establishment of a Center for Mental Health of the Aged within the National Institute of Mental Health.

All of these proposals were set forth by the Special Concerns Session on Mental Health Care Strategies and Aging with portions echoed by the Section on Physical and Mental Health and the Special Concerns Sessions on Long-Term Care for Older People, Aging and Aged Blacks, and Asian-American Elderly.

Administration Response: The Administration is prepared to move on a number of fronts in order to help the Nation achieve the objective of providing effective mental health care for older persons.

The following steps have been or will be taken:

- o The Administration is requesting both the strengthened and expanded Advisory Committee on Older Americans and the new Technical Advisory Committee for Aging Research to give a high priority to the field of mental health with the end in view of recommending strategies to both the private and public sectors designed to bring about a significant improvement in the mental health care of older persons.

These two bodies, made up primarily of persons from outside the Federal government, are being asked to address such issues as: the desirability of including mental health services in a national health insurance program; ways to improve the purchase and provision of mental health care by Federal, State and local governments; the relationship of Medicare

MENTAL HEALTH
(Cont'd)

and Medicaid to mental health programs for older persons; how some of the resources that are currently available for providing services to older persons in their own homes or other places of residence can be utilized for mental health care; how persons preparing for or now participating in the field of mental health can be challenged to obtain the training to care for older persons; what can and should be done to improve the mental health care of older persons living in institutions.

The Administration will make sure that these two Committees, in carrying out this assignment, draw upon the expertise of leaders in the field of mental health for the aging. The Administration views this assignment as a continuous, rather than a one-time, assignment. Recommendations will be continuously evaluated and updated.

- o The Administration will encourage local communities to utilize Federal resources that are now or will be available in such a manner as to include mental health services in coordinated and comprehensive programs for older persons.

Resources that are or will be available under the Older Americans Act, Medicare and Medicaid, and General Revenue Sharing provide opportunities for financing mental health services at the community level as a part of coordinated programs of services for older persons. Mental health services can be included in these packages under some of these Acts. If they are included, it will help to provide services to many older Americans who have experienced difficulties in obtaining mental health services.

- o The Administration supports the objective of enabling older persons to remain in their own homes or other places of residence rather than being placed unnecessarily in mental and other types of institutions.

Specific actions designed to help older Americans remain in their own homes or other places of residence are discussed in other parts of this report. The availability of mental health services for older persons in the home or in community health centers can often be the key to achieving this goal on a broad scale. The number of older persons in mental hospitals can and should be reduced by action from all sectors of society aimed at preventing older persons from entering these hospitals unnecessarily and at making it possible for some who are now in the hospitals to return to their own homes.

MENTAL HEALTH
(Cont'd)

- o More than 400 community mental health centers, with substantial assistance from the Federal government, are offering a variety of out-patient services to citizens of all ages, -- 71 of them offer special geriatric services.

On the basis of the demonstrated effectiveness of these centers, the Administration hopes that additional communities will utilize available Federal, State and local resources, as well as resources from the private sector to establish and operate similar programs. This Administration believes that community mental health centers can play a significant role in the development of comprehensive and coordinated services for older persons at the community level.

- o The National Institute of Mental Health has underway an evaluation study of its research, training and service projects for older persons, with special emphasis on community health center programs.

The objective of this study, which should be completed by the end of the Fiscal Year 1973, is to determine better ways for the delivery of mental health services to older persons at the community level.

NUTRITIONAL
ASSISTANCE

Summary of Conference Recommendations: In a major recommendation, delegates to the Nutrition Section said that the Federal government should assume the responsibility for making adequate nutrition available to all elderly persons in the United States and its possessions. In another recommendation the Section suggested that this responsibility should be fulfilled through the provision of both food and nutrition education.

A major concern of the Nutrition Section dealt with assuring that older persons have access to nutritional meals. It was recommended that the equivalent of the National School Luncheon Program be established for older persons and not be limited to school facilities or for low-income persons. To support such a group feeding program the Federal government was called upon to fund adequate staff, food, supplies, and transportation. The Section further recommended the adoption of a corollary policy which would require food assistance in housing developments to improve group feeding services for tenants and nearby residents.

To complement the group feeding approach, the Section also recommended that the Federal government encourage and support the provision of such core services as food purchase and food preparation, or home delivered meals for eligible persons unable to avail themselves of group feeding.

NUTRITIONAL
ASSISTANCE
(Cont'd)

Recognizing that older persons will often not avail themselves of nutrition services, the Section urged that in such instances skilled professionals should be utilized in an attempt to gain acceptance for the services.

In addition to making recommendations concerning the provision of prepared meals, the Nutrition Section also gave major attention to possible improvements in the Food Assistance Programs of the Department of Agriculture. A number of proposals to expand and liberalize the food stamp program were made. These included use of food stamps to buy meals in restaurants, schools and other group dining settings; structuring the program to conform with the Department of Agriculture's low cost food plan at no increase in the cost of stamps to participants; mailing food stamp applications with Social Security checks or distributing them through some other efficient practical and dignified means; converting approximately 1,000 counties still using the commodity program to stamps by the end of 1972; but, if this is not accomplished, making the commodity program more responsive to the circumstance of the elderly.

The concern of the Nutrition Session for preserving the dignity in the Food Assistance Program was echoed by the Facilities Program and Services Section. The Session on the Elderly Poor urged that older participants in the food assistance programs not lose their eligibility as a consequence of old age insurance increases.

The Sessions on Aged Blacks, the Asian American Elderly and the Spanish-Speaking Elderly recommended improvements in the commodity program including transportation of older persons to and from Commodity Distribution Centers, packaging of commodities in smaller units, and provision of commodities which respond to cultural food preferences. This plea for recognition of cultural differences also applies to the Nutrition Program for the elderly under the Older Americans Act.

Administration Response: The Administration supports the recommendations of the White House Conference on Aging that the Nation marshal its resources to provide adequate nutrition to older Americans.

The first and most essential step towards this goal is the provision of an adequate income--including Social Security, Supplemental Security Income (under the new Federal program provided for in the Social Security Amendments of 1972), and private pension reforms--as discussed earlier.

NUTRITIONAL
ASSISTANCE
(Cont'd)

- o The President asked Congress for the full authorization of \$100 million to implement the Nutritional Program for the Elderly (Title VII of the Older Americans Act.)

The program provides for formula grants to designated State agencies to establish local nutrition programs which provide low cost, nutritious meals daily at least five times a week to older persons 60 years of age or over and their spouses. The Act, and regulations and guidelines pursuant to the Act, place emphasis on the provision of meals to low income and to minority group elderly.

The Nutrition Program emphasizes the provision of group meals at sites preferably within walking distance of the older persons' residences. The law also provides for supporting social services to the elderly participants in the nutrition program. These may include an active outreach program to find the isolated and withdrawn and bring them into the program if they so choose; necessary transportation services where appropriate (this has particular significance for rural areas); escort services; information, referral, counseling; nutrition education; and recreation incidental to the project.

- o The Department of Agriculture revised food stamp eligibility requirements and expanded food assistance programs so that now virtually every county in the Nation offers some form of food assistance to the elderly.

Reforms have been made in the Food Stamp and Commodity Distribution programs of the Department of Agriculture. National eligibility standards have been set for food stamp eligibility, and benefits are increased to keep pace with the cost of living.

In early 1969 the annual bonus for a single person with an income of \$1,200 was \$72 and for an elderly couple with an income of \$1,800 the annual bonus ranged from \$120 to \$144. By 1972 these annual bonus benefits increased to \$216 and \$336 respectively.

Virtually every county in the Nation now offers either the Food Stamp or the Food Distribution Program; in early 1969 nearly 500 counties offered neither. In all, 2.5 million older Americans benefit from at least one of these programs. Recently the Department of Agriculture has sponsored the Drive to Serve Program. There are many elderly persons who are eligible to receive donated foods, but because of illness, disability or transportation problems, they are unable to get to the distribution centers. Through the cooperative efforts of the Department, State and local welfare authorities, and adult and high school volunteers, Drive to Serve provides a delivery system of foods to these senior citizens in many communities.

NUTRITIONAL
ASSISTANCE
(Cont'd)

Home delivered meals (Meals-on-Wheels) may be purchased with Food Stamps by handicapped, elderly persons who are unable to prepare their own meals. Also, donated foods are available to non-profit, tax-exempt institutions which provide home delivered meals to the extent of the needy served who are not using stamps to pay for meals. Also included in the Food Stamp Program are free food stamps for the extremely poor. Several publications have been translated into Spanish for use and distribution by community outreach workers when they meet with potential recipients.

Beginning in January, 1974, the new Supplemental Security Program administered by the Social Security Administration will begin providing cash payments to the low income elderly, to take the place of the welfare check and the food stamps they now receive. In many States, the Federal payment will be higher than the present amount received from a combination welfare and food stamp program, and recipients will have the freedom to choose how much of their income will go to food and how much for other purposes.

States that now provide higher welfare payments than those which will be provided under the new program and choose to supplement under the new payment, may adjust their January, 1974 levels of payment upward to take account of the bonus value of food stamps --- that is the value of the stamps reduced by their cost to the purchaser. States that opt to have the Federal government administer their supplementary payments will be relieved of the administrative cost of making such payments and in addition will be guaranteed by the Federal government that the cost of their supplementary payments (including the bonus value of food stamps, if paid in cash) will be no greater than the amount of their total expenditures for public assistance payments to the aged, blind or disabled during calendar year 1972.

NUTRITIONAL
ASSISTANCE
(Cont'd)

- o The President launched Project FIND to seek out and enroll eligible older Americans in existing food assistance programs.

Along with these efforts, an intensive drive was made to assure that needy elderly would be involved in existing food assistance programs. Last March the President told Congress,

"Many older persons who are entitled to food stamps or to surplus commodities are still not receiving them. Why is this the case? In many instances, older Americans do not realize they are eligible for participation. The agencies which provide assistance are often unaware of older persons who need their services. Some older persons choose not to participate -- out of pride or out of fear that accepting food assistance may subject them to the arbitrary treatment they associate with the present Welfare system. In some cases, older persons want to participate but find that necessary transportation is unavailable."

In keeping with the request of the Conferees for "action now," the President launched Project FIND on August 3, 1972 when brochures were mailed to over 25 million Social Security and Medicare beneficiaries (of which about 21 million were over the age of 60). The brochures described the existing food assistance programs and what actions should be taken in order to enroll. For those individuals who felt they needed special assistance, a prepaid card was enclosed. Similar mailings were made to beneficiaries of the Federal Retirement and Railroad Retirement Systems.

Over 1.4 million cards were received. The American Red Cross organized a nation-wide volunteer effort, with personal contact by over 35,000 volunteers to those individuals who sent in a card.

Prior to mailing, over 1,000 State and local government organizations and private voluntary groups, together with Federal employees and Federally-funded volunteers, were alerted to Project FIND and asked to participate.

Project FIND, working across Department and agency lines, as well as with State and local government agencies -- while enlisting the support of private volunteers -- exemplifies the commitment this Administration has to marshalling all available resources of the Nation in carrying out the recommendations of the Conference delegates.

NUTRITIONAL
ASSISTANCE
(Cont'd)

- o The Veterans Administration and the Department of Agriculture have initiated steps to improve the nutritional information, education and delivery systems.

- The Veterans Administration is testing ways to assure that adequate, nutritional meals are available to the elderly.

The Veterans Administration has been investigating meals-on-wheels type programs and is developing ways in which such programs may be initiated and extended. There is considerable expertise among Veterans Administration professional dietitians who provide dietary assistance to both inpatients and outpatients in agency operations. They also participate in inspection of community nursing homes that are providing accommodations for veterans under contract with the Veterans Administration.

- Extension Service Nutritionists at the Federal and State levels have begun accelerating their consumer nutrition programs, giving special emphasis to the aged consumer.

One section of a nationwide nutritionist workshop conducted in November of 1972 dealt with improving counseling and information for the aged.

- Special informational material on nutrition is being developed for the Spanish speaking community.

Labels for donated foods are now available in Spanish. To assist other ethnic groups, the Department of Agriculture is introducing a new system of label improvements including illustrative mixing instructions, nutritive information and color sketches of container contents. (See also Consumer Protection.)

CHAPTER IV:

ASSURING INSTITUTIONAL RESPONSIVENESS AND
A NEW ATTITUDE TOWARDS AGING

EXECUTIVE BRANCH
OF THE FEDERAL
GOVERNMENT:
CENTRAL UNITS

Summary of Conference Recommendations: Nine Sections out of the fourteen and two Special Concerns Sessions recommended changes that, if effected, would result in the establishment, within the Executive Branch of the Federal government, of a central unit concerned with aging. Many of the groups urged that this be a new unit within the Executive Office of the President with responsibility for coordination, planning and advocacy. The Section on Research recommended that this new unit have the additional responsibility of developing and coordinating the execution of a Federal research strategy on aging; a majority of the Training Section made a similar recommendation with respect to training. The Spiritual Well-Being Section suggested that the responsibility of the unit include evaluation of the extent to which Federal programs were responsive to the needs of the elderly, while the Government-Non-Government Organization Section wanted the unit charged with primary responsibility for policy formulation concerning the elderly. Two Sections recommended that the new unit be required to report to the Congress annually on the progress that the Executive Branch had made in meeting the needs of older persons.

The Retirement Roles and Activities Section recommended that the Administration on Aging be elevated to the status of an independent agency within the Department of Health, Education, and Welfare, and function as the central unit. By implication, the Education Section and a minority of the Training Section would seem to have supported this position. While the Planning Section wanted a new unit created within the Executive Office, it nonetheless supported the restoration of the Administration on Aging to its former status.

The Special Concerns Session on the Deaf Elderly recommended the establishment of a permanent Presidential Commission with appropriate representation of sub-groups of the aged population.

Two Sections recommended that in addition to the central unit, an interdepartment committee of high ranking Federal officials be established. The Government-Non-Government Organization Section recommended that an advisory council of citizens was needed to assist the central unit.

In contrast to the prevailing view that more coordination of Federal programs which affect the

EXECUTIVE BRANCH
OF THE FEDERAL
GOVERNMENT:
CENTRAL UNITS
(Cont'd)

elderly was the direction in which to move, three groups recommended the creation of a separate aging agency to which all such Federal programs could be transferred.

Another common theme was the need for the creation within agencies of positions or units devoted to meeting the concerns of older persons. Such positions or units were recommended for the Departments of Housing and Urban Development, Labor, and Transportation and for the Office of Education and the National Institute of Mental Health within the Department of Health, Education, and Welfare, and the Office of Consumer Affairs within the Executive Office of the President. The Government-Non-Government Organization Section went further and suggested that each cabinet level agency should appoint an Assistant Secretary for Aging.

One group recommended the establishment of a Cabinet Committee on Asian Americans, while another urged the creation of a cabinet-level Department of Family Life. The Section on Employment Retirement called for a National Pension Commission.

Three Sections, Income, Housing and Government-Non-Government Organization, recommended the creation by the House of Representatives of a committee on aging comparable to the Senate Special Committee on Aging.*

Administration Response: The President has made it clear that he agrees with the delegates that "the way in which the Government is organized to deal with the problems of older Americans" is an important concern.

As a result of the President's concurrence in the judgement of the delegates, the following actions have been taken to assure that "the voice of the elderly is heard" at the highest level of government.

- o The President created the Domestic Council Cabinet-level Committee on Aging to respond to the needs of the elderly at the very highest level of government.

*Most of the recommendations dealt with action required of the Federal Executive Branch of the government; responsibility for initiative and action on this particular suggestion obviously rests with the Members of the House of Representatives.

EXECUTIVE BRANCH
OF THE FEDERAL
GOVERNMENT:
CENTRAL UNITS
(Cont'd)

It was specified that this committee should be chaired by the Secretary of Health, Education and Welfare and should be composed of the following:

- Secretary of Health, Education and Welfare,
Chairman
- Secretary of Housing and Urban Development
- Secretary of Agriculture
- Secretary of Transportation
- Secretary of Labor
- Secretary of Commerce
- Director of the Office of Management and
Budget
- Special Consultant to the President on
Aging

The Chairman of the U.S. Civil Service Commission, the Special Assistant to the President on Aging, the Administrator of the Veterans Administration, Directors of ACTION, the Office of Economic Opportunity, and the Office of Consumer Affairs were designated to serve as consultants to the Committee.

This was established as a working committee which, among other duties, was charged with the responsibility of developing government-wide aging policy and making sure that the President's decisions in the field of aging were carried out.

- o The Administration on Aging has been moved to the Office of the Secretary of Health, Education and Welfare within the Office of the Assistant Secretary for Human Development.
- o Upon taking office, the President appointed the Commissioner on Aging to serve as his Special Assistant on Aging.
- o At the White House Conference on Aging, the President announced that he was establishing the position of Special Consultant to the President on Aging.
- o As a result of action suggested by the Domestic Council Committee on Aging, the President will send a memorandum to each Department or Agency with responsibility for programs in the field of aging

EXECUTIVE BRANCH
OF THE FEDERAL
GOVERNMENT:
CENTRAL UNITS
(Cont'd)

calling for the designation of a person to coordinate programs for older persons across departmental lines. This individual will report directly to the Secretary or agency head on these matters.

The Secretary of Housing and Urban Development appointed such an official and, in addition, called for the designation of a similar position in each of the Department's major program areas, and in each of the regional offices.

- o The Secretary of Health, Education and Welfare has taken steps both to expand and to strengthen the Advisory Committee on Older Americans which was established by the Older Americans Act to advise the Secretary on all Departmental matters relating to older persons.

The Secretary has specified that the Commissioner on Aging shall, in his capacity as Chairman of the Committee, report directly to him. In addition, a former Undersecretary of Health, Education and Welfare has been designated as the Executive Vice Chairman of the Committee, and the Committee has been provided with its own staff director and supporting staff.

- o The Undersecretaries' Group, acting on a recommendation of the Cabinet-level Committee on Aging, has specified that each Federal Regional Council should establish a committee on aging in order to accelerate the development of comprehensive and coordinated programs for the delivery of services to older persons at the community level.

These committees will consist of representatives from the appropriate Federal Regional offices. Six out of ten Regional Councils have already initiated action in this direction.

* * *

The above actions reflect the Administration's concurrence with the prevailing view of the delegates to the Conference, namely, that more effective coordination of Federal programs which affect older persons is the direction in which to move. This is preferable to creating a separate aging agency to which all such Federal programs could be transferred.

STRENGTHENING
PLANNING AND
COORDINATION OF
AGING PROGRAMS

Summary of Conference Recommendations: A variety of Sections and Special Concerns Sections made recommendations concerning future directions for agency aging programs. One common concern was the source of authority of the central unit over agency programs. (See previous Section). The Planning Section and Aging and Aged Blacks Session urged that

STRENGTHENING
PLANNING AND
COORDINATION OF
AGING PROGRAMS
(Cont'd)

the agency programs be woven together using the mechanism of a comprehensive plan. The Planning Section saw the central unit shaping the agency program through advocacy, while the Government-Non-Government Organization Section suggested mutual adjustments reflected in joint agreements. Central review of all proposed agency legislative and administrative actions was suggested, as was the issuance of an overriding Federal directive that agencies using the mechanism of State or local planning, include in their guidelines the requirement that the needs of the elderly be addressed in the planning process. The extent to which such planning did take the needs of the elderly into consideration would be made known through agency reports to the central unit which would subsequently make them and its evaluation of them public. The Facilities, Programs and Services Section urged that strong administrative authority, including control over funding, be vested in the central unit. A concern addressed by three Sections was whether new programs to meet the needs of older persons should be established within the Administration on Aging or within functional agencies. All of the Sections opted for the latter.

Three Sections, Government-Non-Government Organization, Planning, and Facilities, Programs and Services recommended that the same type of organized structure, responsibilities, and authority which a majority of commenting groups had urged for the Federal level be paralleled at the State and sub-State levels, except that the Planning Section suggested that at the sub-State level the organizational focus be left to the option of the affected parties. The Planning Section also urged that when possible sub-State aging organization take place at the regional, as distinguished from the local, level.

The Section on Education recommended that State Departments on Education should designate a staff member as responsible for the education of older persons, while the Session on Physical and Vocational Rehabilitation suggested such an assignment in State Rehabilitation Agencies. The Session on the Elderly Consumer called for a comparable designation in all State and local Consumer Protection Agencies.

Two Sections dealt extensively with the issue of what the relationship should be between the central unit at the Federal level and the central units

STRENGTHENING
PLANNING AND
COORDINATION OF
AGING PROGRAMS
(Cont'd)

at the other levels. The Government-Non-Government Organization Section and the Planning Section saw the State and sub-State units receiving a large share of the funding they need to carry out their responsibilities from the Federal government. The Government-Non-Government Organization Section viewed such funding in the Federal interest since it provided an incentive at the other levels to parallel the Federal structure.

The Section also strongly urged the development of greater vertical linkages through such devices as encouraging the participation of the State and sub-State units with (a) forward year financing, (b) the opportunity to comment on new or revised policies before such changes are written in concrete, and (c) advance notice on grant awards.

Concerning the allocation of funds to meet the needs of the elderly, two Sections and one Special Concerns Session explicitly endorsed the concept of earmarking in general. The Planning Section, while noting that earmarking should only take place when attempts to meet the needs of older persons as part of a larger population fail, urged that protections for the elderly comparable to earmarking be built into the concept of general revenue sharing, even before the concept is actualized. Earmarking to benefit the elderly in manpower, housing, legal services, rehabilitation, anti-poverty programs, and law enforcement assistance was also recommended. While not specifically mentioning earmarking, the Education Section called for an expansion of funds for educating the elderly which could in all probability only be accomplished through earmarking.

Related to the concept of earmarking was the question of whether older persons should receive services in multi-generational settings or in settings limited exclusively to the elderly. The Sections on Education, Facilities, Programs and Services, and Spiritual Well-Being all recommended multi-generational settings, but, to varying degrees, all three called for the provision of age segregated alternatives aimed at meeting the distinctive needs of the elderly.

Yet another concern raised by a Section dealt with cost sharing requirements for Federal grants,

STRENGTHENING
PLANNING AND
COORDINATION OF
AGING PROGRAMS
(Cont'd)

a characteristic of most Federally funded programs affecting the elderly. The Education Section recommended that in programs serving the elderly, the matching requirement be deemed to have been met by the contributions to society during their lifetime of the older participants in the program.

If the Federal government funds planning, should it determine priorities? Three Sections urged local determinations, with the majority of one Section suggesting, however, that Federal priorities should be based on and responsive to local wishes, as distinguished from being local wishes.

Corollary to the issue of determination of priorities is the question of who should set standards. Three Sections recommended that the Federal government should set standards. The Special Concerns Session on Aged Blacks recommended that the Federal government set standards (a) for black staffing of State and sub-State units on aging and (b) to assure the accessibility of aged blacks to all Federally funded services.

In a like vein, to ensure that special needs of older persons who belong to a sub-group are not overlooked, the Section on Education recommended that persons who have bi-cultural and/or bi-lingual expertise be employed in program planning, while the Sessions on the Elderly Deaf and Aging and Aged Blacks urged that the deaf and black persons be employed in program administration and services delivery.

Administration Response: This Administration is committed to bringing about more effective planning and coordination of Federal programs in the field of aging and to encouraging the coordination of Federal resources with those made available by State and local governments and by private agencies.

This commitment was stated by the President, when in his Special Message on Aging, he stated "I am asking that the Older Americans Act be amended to strengthen our planning and delivery systems for services to the elderly. Too often in the past, these systems have really been 'non-systems', badly fragmented, poorly planned and insufficiently coordinated. . ."

In light of this commitment, the following actions have been or will be taken:

STRENGTHENING
PLANNING AND
COORDINATION OF
AGING PROGRAMS
(Cont'd)

- o The Administration proposed amendments to Title III of the Older Americans Act which provide additional stimulus to planning and coordination.

Under the proposed amendments, the Administration on Aging would establish general priorities which would serve as guides to activities at the State and local levels. States would establish objectives and create planning and service areas throughout the State within which ongoing program resources could be targeted to meet the service needs of the elderly. Agencies at the State and local levels would then mobilize and coordinate public and private resources to meet the objectives. The Federal government would have the responsibility of approving State plans.

The Federal government would be authorized to fund up to 75 percent of the administrative costs of these planning agencies and up to 90 percent of the cost of the social services provided under the authority of an approved area agency plan. Services in areas not covered by an approved area plan could be funded up to 75 percent. Additional funds would be allocated for special assistance in developing new and innovative approaches and to strengthen particularly promising area plans.

A proposed strategy for implementing the State and Area programs under an amended Older Americans Act is in preparation. The regulations controlling the strategy will be published in the Federal Register later this year after Congress has completed final action on the amendments to the Act.

- o The President directed those agencies whose programs have a major impact on the lives of older persons to provide the Domestic Council Committee on Aging with the amounts they expect to spend during the current fiscal year in their respective programs.

STRENGTHENING
PLANNING AND
COORDINATION OF
AGING PROGRAMS
(Cont'd)

In compliance with the Presidential directive, the departments and agencies have advised that they expect to spend in FY 1973, the sums of money, as shown in Table I (see p. 104), on programs serving the needs of older persons. This table should be read in light of the explanatory material at the bottom of the table. In brief, the estimates included in the table should be regarded as order of magnitude figures. It should also be recognized that they have been developed in consideration of action taken to date by the Congress on appropriation requests for the 1973 Fiscal Year. In view of the fact that actions have not been taken on appropriations for 1974, comparable figures for FY 1974 are not available.

- o The Administration will take steps to improve coordination in the expenditure of funds from these sources.

The President has made clear his intention of utilizing the powers of the Presidency in order to bring about more effective Federal coordination in both the planning and implementation of programs for older Americans.

In furtherance of the coordination process, the Administration on Aging will provide information concerning Federal programs to the States so that it can be utilized in State and local planning. State aging agencies will also be able to transmit their views on proposed Federal programs within their States, thereby furthering the interchange of information and strengthening over all coordination.

RELATIONSHIP
OF GOVERNMENT
TO NON-
GOVERNMENT

Summary of Conference Recommendations: In addition to examining the relationship between the central units at each level and aging programs and between the central units themselves, several Sections looked at the relationship between such units and both groups and individuals outside of government. The Facilities, Programs, and Service Section, the Planning Section, and the Special Concerns Session on the Elderly Poor saw government planning with, and on behalf of, older persons as preeminent over non-governmental efforts, although the Planning Section went on to qualify this view by suggesting that non-government should be involved in decision making, that at the sub-State level where non-government activity in aging was greatest, planning had to result from a partnership between government and non-government, and that governmental planning should be directed at the use of non-governmental resources as well as governmental. The Government-Non-Government Organization Section saw the relationship as one in which the governmental units fostered

TABLE I

Estimated Federal Funds Serving the Needs of Older Persons (65 and over)
(Fiscal Year 1973)

<u>Department / Agency</u>	<u>Total Reported to the Domestic Council Committee on Aging*</u> (in millions)			
	<u>Income</u>		<u>Services</u>	
<u>Trust Fund Financing</u>				
Civil Service Commission Retirement and Health Benefits	2,546			
Health, Education and Welfare Social Security Benefits	40,722			
Labor Unemployment Insurance	282			
Railroad Retirement Board Retirement and Health Benefits	2,054			
	45,604			45,604
<u>General Revenue Financing</u>				
ACTION			40**	
Agriculture	336		76	
Defense	516			
Health, Education, and Welfare Office of Education			2	
Public Health Service			68	
Social and Rehabilitation Service	2,831		460	
Social Security Administration	2,454			
Housing and Urban Development			446	
Labor			20	
Office of Economic Opportunity			101***	
Transportation	10		2	
Veterans Administration	2,263		617	
	8,410		1,832	10,242
TOTAL ESTIMATED FEDERAL FY 1973 FUNDS	54,014		1,832	55,846

* These estimates should be read in the light of the following considerations:
(1) They are based on the best measure of involvement in the field of aging for each individual program. These measures include: budget authority, obligations, outlays, contract commitments, etc. (2) In some cases, they represent an estimated amount of benefit for the aged where the benefit is only a portion of the program or activity. (3) They include benefits provided to the elderly regardless of the reason for providing the benefits. Thus, they are based on a broader definition than other tabulations which are limited to those benefits provided primarily because of the age of the beneficiaries. (4) They are subject to adjustments resulting from final Congressional action on the President's Fiscal Year 1973 budget request.

** Information provided reflects outlays for persons 60 years and over.

*** Information provided reflects outlays for persons 55 years and over.

RELATIONSHIP
OF GOVERNMENT
TO NON-GOVERN-
MENT (Cont'd)

coordination, provided funds, and set standards while the non-government organizations provided services and conducted training.

If the groups which dealt with the issue thought that authority for planning should be a public responsibility, one of the most widely reiterated concerns throughout the Conference was that the activities which go into planning require the participation of a variety of groups. Planning, observed the conferees, requires the input of older persons, non-government organizations, including private enterprise and older persons' membership organizations, professionals, paraprofessionals, representatives of younger age groups, public officials related to the budget process, and both older and younger members of sub-groups such as the handicapped or minorities. In helping plan, older persons should be called upon for advice and should participate, various Sections and Sessions felt, in policy making, standard setting, decision making, and goal setting.

Administration Response: The Administration agrees with the delegates to the White House Conference that the non-government sector should be involved with government in the planning and implementation of programs for older persons.

Consistent with this commitment, the following steps have or will be taken:

- o The Administration has proposed amendments to the Older Americans Act which would actively involve voluntary agencies in the establishment of comprehensive and coordinated systems for the delivery of social and nutritional services.

These amendments also call for special attention to be given to assuring opportunities for the involvement of older persons in the planning of these systems. Guidelines for use by State and sub-State planning agencies will be disseminated to the States once the amendments have been enacted into law.

- o The Secretary of Health, Education and Welfare has issued regulations under the new Nutrition Program for the Elderly which are designed to assure, in accordance with the law, that nutrition projects are established and administered with the advice of persons competent in the field of nutrition,

RELATIONSHIP
OF GOVERNMENT
TO NON-GOVERN-
MENT (Cont'd)

of older persons who themselves will participate in the program, and of persons who are knowledgeable with regard to the needs of older persons.

Under these regulations, each State agency must obtain the views of the recipients of nutrition services in developing and administering the Nutrition Program at the State level. In addition, the sponsor of each nutrition project must obtain the views of potential recipients of nutrition services in developing the project plan. Once the project has been funded, the sponsor is required to establish a Project Council of which half the members must be actual recipients of services. This would include heavy emphasis on minorities and low income elderly. This Council will render advice on all matters related to the conduct of the project and will approve project policy related to menu, fees, decor, and days and hours of operation.

- o Both prior to and since the White House Conference on Aging, the Chairman of the Conference has consulted with the Washington representatives of the national organizations of older persons.

In addition, the Chairman has also met on two occasions with field representatives of these organizations in connection with meetings he has held in the headquarters cities of the ten Federal regions. With a combined membership of over six million older persons, these organizations have had and will have an important impact on new approaches to issues in the field of aging, and on the effective utilization of existing authorities and resources.

- o The Secretary of Health, Education and Welfare has provided for the expansion and strengthening of the Advisory Committee on Older Americans -- a committee which, with the exception of the Chairman and Vice Chairman -- is made up of persons from outside government.

In addition, the Secretary has also appointed a new Technical Advisory Committee for Aging Research. The members of this committee are from the private sector. In order to contribute to both their effectiveness and their independence, the Secretary has provided both of these committees with their own staffs.

- o The President, in submitting the re-organization plan to Congress, which resulted in the creation of ACTION, stated in his Message that the new agency would explore innovative ways of utilizing volunteer services.

RELATIONSHIP
OF GOVERNMENT
TO NON-GOVERNMENT
(Cont'd)

The President recommended doubling the resources of the Foster Grandparents program and broadening its scope. In addition, he recommended tripling the program level of the Retired Senior Volunteers Program.

- o The Administration, through the Administration on Aging, has enlisted the cooperation of the National Center for Voluntary Action to provide staff assistance for the Steering Committee of National Volunteer Organizations.

This Steering Committee, which is composed of members from 138 national volunteer organizations, has developed as its objective the active participation of volunteers in programs of service to older persons in their own homes or other places of residence. Through the Steering Committee, local counterpart committees have been established in 224 communities throughout the Nation. Currently, plans are being developed to expand support to include the possible involvement of another 300 communities, with the ultimate objective being to have a voluntary group in every community in the Nation helping to serve the elderly.

- o The Secretary of Health, Education and Welfare has authorized the implementation of a plan calling for the appointment of a person, within the Office of the Secretary, to look across all Departmental lines to see where the opportunity for greater volunteer involvement can be effected.

This will involve determining how volunteer groups are currently being used in support of existing programs; where legislation authorizes or restricts the use of volunteers; and where planned activities can make better use of volunteers. Following this determination, the Department will then develop a more comprehensive strategy for volunteer involvement.

- o The initiation of Project FIND in the summer of 1972 exemplifies the commitment of the Administration to facilitate the involvement of the non-government sector in programs for older persons.

Project FIND cuts across Department and agency lines to involve the Department of Health, Education and Welfare, the Department of Agriculture, the Department of Treasury, ACTION, the Office of Economic Opportunity, the White House Conference on Aging, and the Domestic Council Committee on Aging. Its effectiveness is dependent on active involvement of a nationwide volunteer network, organized under the direction of the American Red Cross, to seek out and follow-up on older persons who qualify but have not taken advantage of available food assistance programs. Approximately 35,000 volunteers have been recruited by the Red Cross

RELATIONSHIP
OF GOVERNMENT
TO NON-GOVERNMENT
(Cont'd)

through appeals to the general public at large and through communication with organizations primarily concerned with the problems of the aged and with civic groups whose histories have revealed a willingness to get involved when given the opportunity.

REORGANIZATION
FOR BETTER
DELIVERY OF
HEALTH CARE
SERVICES

Summary of Conference Recommendations:

A major concern of the delegates was the improvement of the delivery and organization of health care services. Recommendations by the Income and Mental Health Sections dealt with the appropriate focus of responsibility for initiating such improvements. The Income Section called for the government to assume responsibility. The Physical and Mental Health Section recommended that delivery of health care services result from a public-private partnership. One form such a partnership might take was suggested by the Session on Long-Term Care in its recommendation that the Secretary of Health, Education and Welfare study the feasibility of health facilities becoming public utilities.

Although the Physical and Mental Health Section favored the provision of health service to the elderly as an integral part of a coordinated system providing comprehensive care to all persons, it called for immediate and special attention to meeting the needs of older persons for improved health services.

Considerable attention was focused on the inadequate delivery of services to the poor, the rural, the minority, and the socially isolated aged. A solution proposed by the Special Concerns Session on Aging and Aged Blacks was service delivery through community health corporations; the Special Concerns Session on Asian-American Elderly called for systems that would build on kinship and family ties, and mobile health units with trained staff to relate to the language and culture of Asian ethnic groups; the Special Concerns Session on Spanish-Speaking Elderly recommended that where applicable, representatives of elderly Spanish speaking and migrants be appointed to all bodies concerned with providing comprehensive health service systems; and the Special Concerns Session on Rural Older People called for the consideration of the unique characteristics of rural areas in the design of health service delivery systems.

Administration Response: The Administration has made recommendations to the Congress and has taken administrative actions which are designed to bring about a marked improvement in the delivery of health services to all of our citizens, including older persons.

The following steps have been or will be taken:

REORGANIZATION
FOR BETTER
DELIVERY OF
HEALTH CARE
SERVICES (Cont'd)

- o This Administration is providing assistance for the demonstration of the Health Maintenance Organizations concept.

These organizations would bring together a comprehensive range of medical services in a single organization, thus assuring convenient access to all services, with a plan that allows for the payment for the needed services for a fixed contract fee paid in advance by all subscribers.

- o The President, in order to make available the services of Health Maintenance Organizations to a large number of older persons, recommended to the Congress that Medicare recipients be enabled to join such programs.

This proposal has been enacted as part of H.R. 1 (P.L. 92-603).

- o The Administration, through the National Health Service Corps, has funded projects to demonstrate the feasibility of attracting and retaining health professionals for services with minority groups and in rural areas.

This new program has selected 143 communities to receive Corps assignees, and is currently seeking physicians, nurses and other health staff to complete the placement of 407 positions. The Corps, while helping to meet the immediate health care needs of the total population, will devote much attention to the problem of developing outreach systems to provide care to those who need it most.

- o The Administration on Aging and the Health Services and Mental Health Administration have entered into a formal agreement to improve delivery and coordination of health and social services for older persons.

This agreement provides for joint consultation and sharing of experts, and coordination of planning, funding and implementation of programs.

ORGANIZING TO
MEET THE NEEDS
OF SPECIAL GROUPS

Summary of Conference Recommendations:

Most of the recommendations of the Special Concerns Sessions on Aged Blacks, the Asian Elderly, the Elderly Indian, and the Spanish-Speaking Elderly are addressed elsewhere in this document.

The thrust of the recommendations of these groups is a plea for recognition of the special circumstances unique to each group. Thus, the Spanish-Speaking Elderly request not just more housing but more housing designed according to Spanish cultural traditions; the Asians request that the cultural diversity of this sub-group be recognized; the Indians request that the Older

ORGANIZING TO
MEET THE NEEDS
OF SPECIAL
GROUPS (Cont'd)

Americans Act funds be distributed directly to the tribes, bypassing the State agencies; and the blacks request eligibility for retirement benefits at an earlier age than non-blacks to reflect the high incidence of death at an early age for black men.

There were, however, four types of recommendations which emerged from some, if not all of the Sessions which appropriately deserve separate consideration. First, the groups recommended that members of each of the minority groups be represented on any of the policy making bodies associated with central units and/or on the staffs of such units.

Second, the groups recommended that all Federal programs affecting the elderly evaluate and report back on the responsiveness of those programs to older members of each of the minority groups.

Third, the groups recommended that special data gathering efforts take place so that the extent to which older members of minority groups participate in Federally-financed programs can be effectively measured.

Fourth, the groups recommended that the Federal government provide ongoing financing to the follow-up of the Conference activities of national organizations representing the older members of such minority groups.

The delegates also recommended that public attitudes toward the aged, disabled, blind and deaf must be improved. The Aging and Blindness Session observed that continuing education was required to guarantee inclusion of services for older blind people in general service programs for older people; the Vocational Rehabilitation Session recommended that employers should be educated to see the values of hiring disabled older workers; likewise, the Aging and Deafness Session called for the education of employers to see the values of hiring older deaf workers.

Another common theme emerging from the three sessions was that while the elderly handicapped experience both the problems of being old and being handicapped, it was necessary to perceive the elderly handicapped as, first, handicapped and only then, as old.

While the specific recommendations of the Sessions outline methods of directly assisting older handicapped Americans, the recommendations as a group dramatize the pressing need for immediate attention, separate and distinct from that being given to improving the circumstances of all older people.

A variety of Conference groups expressed the desirability of assuring that Federal programs reach those older persons who need them most. These persons were

ORGANIZING TO
MEET THE NEEDS
OF SPECIAL GROUPS
(Cont'd)

alternately described as the poor, members of racial and/or ethnic minorities, the adversely circumstanced, the isolated, the disabled, the disadvantaged, and those less likely to avail themselves voluntarily of programs. The recommendations generally stated that special attention should be devoted to these groups. While sharing this regard for disadvantaged older persons, the Government-Non-Government Organization Section recommended that services for the elderly be available to all older persons who wish to take advantage of them.

A number of groups recommended that Federal policies and programs applicable to older persons residing in the fifty States and the District of Columbia apply equally to older persons residing in Puerto Rico and the territorial possessions of the United States. Several groups also suggested that special attention be devoted to improving the circumstances of older persons in the Trust Territories.

Administration Response: The Administration believes that programs in the field of aging must take into account the special circumstances that are unique to each minority group and the handicapped.

Meeting the Special Needs of Minorities:

- o On the recommendation of the Cabinet-level Committee on Aging, the Administration on Aging will require State planning groups on aging to include representatives of minority groups on their advisory bodies.

The proposed amendments to the Older Americans Act require the development of State plans for the use of Federal funds. If these amendments are enacted, the Administration on Aging will ask that each State establish an advisory body to review and comment on these plans. These advisory bodies should include adequate and appropriate representation of minority groups.

- o The Cabinet-level Committee on Aging has recommended to the President that he direct the Federal agencies in the field of aging to develop provisions comparable to those contained in the Nutrition Program for the Elderly under the Older Americans Act which provide that, to the extent feasible, grants serving and operated by minority groups will be awarded in proportion to their relative numbers in the states.

The Administration on Aging has recently developed operational guidelines for the new nutrition programs for the elderly to enforce that provision of the program which states that: "Preference shall be given in

ORGANIZING TO
MEET THE NEEDS
OF SPECIAL GROUPS
(Cont'd)

awarding grants to carry out the purposes of this title to projects serving primarily low-income individuals and provide assurances that, to the extent feasible, grants will be awarded to projects operated by and serving the needs of the minority, Indian, and limited English-speaking eligible individuals in proportion to their numbers in the State."

By requiring the other Federal agencies to develop comparable guidelines for grant programs that serve the elderly, the special needs of minority groups should be better met.

- o The Administration has taken several steps to ensure that Federal, regional and area offices are staffed with persons sensitive to the problems of minority groups.

The General Services Administration has determined that the ethnic and racial mix of the staff members of its Federal Information Center is a prime consideration in ensuring that the elderly can feel free to express their needs. Where the need is apparent, staff members with linguistic ability have been employed to ensure adequate communication with the public, e.g., thirteen Federal Information Centers have members of their staff who speak Spanish and seven have staff members with another language facility such as Japanese. This process has proven to be a very positive way to improve communication, particularly with the older members of ethnic and minority groups.

In addition, the Administration has expanded its commitment to the interests of minority groups by directing other government agencies, especially those with primary responsibility for dealing with the elderly, e.g., Social and Rehabilitation Service, Social Security Administration, U.S. Department of Agriculture and the Office of Economic Opportunity, to make certain that the regional and district offices are staffed with individuals sensitive to minority group problems, and who possess the language ability to deal effectively with the problems of the elderly from minority groups within their specific areas.

- o Minority groups are represented on the Post-Conference Board of the White House Conference on Aging.

At the White House Conference on Aging, the President directed that a Post-Conference Board be created to follow-up on the recommendations of the conferees. This group has one hundred and five members made up of former delegates, members of the

ORGANIZING TO
MEET THE NEEDS
OF SPECIAL
GROUPS (Cont'd)

study groups in the pre-planning for the conference, expert consultants from the field of aging and from private organizations representing the elderly. Of the total membership, twenty percent are members of racial and ethnic minorities.

- o The Cabinet-level Committee on Aging has recommended to the President that he direct all Departments and agencies to collect and evaluate data concerning the participation of minority groups in Federally funded programs for the aging.
- o Other recommendations made by the delegates designed to deal with special circumstances unique to a particular minority group will be the subject of special studies by the appropriate Departments or agencies.

Recommendations growing out of these studies will be discussed by the Administration with representatives of the minority group in question who have served on the Post Conference Board.

- o The Office of Management and Budget devotes considerable time and effort to making sure that Federal programs in aging are reaching all Americans -- including minorities -- in an equitable fashion.

This agency, in the Executive Office of the President, is currently studying ways to introduce Federal domestic assistance program beneficiary data, broken down by race and ethnic group, into the budget formulation and program analysis process.

Meeting the Special Needs of the Handicapped:

- o The Administration will encourage local communities to include in their plans for coordinated services for older persons programs designed: (1) to assist in the rehabilitation of the elderly handicapped; (2) to help the elderly handicapped remain in their own homes or other places of residence; and, (3) to provide the elderly handicapped with opportunities for continued involvement in life through full-time or part-time employment or through volunteer activities.

Federal, State and local funds that can be used to develop "service packages" for older persons at the community level--such as funds under the Older Americans Act, the Adult Services titles of the Social Security Act, and General Revenue Sharing--can be used to meet the unique needs of handicapped older persons.

- o The Rehabilitation Services Administration has funded projects designed to rehabilitate elderly disabled poor and to place them in remunerative employment.

ORGANIZING TO
MEET THE NEEDS
OF SPECIAL GROUPS
(Cont'd)

It is hoped that these research and demonstration projects will demonstrate methods and techniques which can be utilized by State rehabilitation agencies in order to strengthen and expand their programs for the rehabilitation of older handicapped persons.

- o The Rehabilitation Services Administration is making it possible for persons in private and public agencies working with the handicapped to participate in short-term training courses -- courses which are focusing on the implementation of recommendations made by the delegates to the White House Conference.
- o The Department of Health, Education and Welfare, consumer organizations, and related professional associations have initiated a program designed to focus appropriate resources on dealing with the health, education and welfare problems associated with deafness -- including the problems of aged deaf persons.

This project is spearheaded by the Rehabilitation Services Administration of the Social and Rehabilitation Service and is being carried on in cooperation with Gallaudet College, 37 bureaus of the Department of Health, Education and Welfare, and consumer and professional organizations.

- o The Rehabilitation Services Administration is funding demonstration projects to staff special rehabilitation adjustment centers for the geriatric blind.
- o The Veterans Administration is engaged in a wide variety of programs to assist aging patients who are blind or have a severe visual impairment.

There are three basic program elements in the Blind Rehabilitation Program of the Veterans Administration's Department of Medicine and Surgery. They are:

ORGANIZING TO
MEET THE NEEDS
OF SPECIAL GROUPS
(Cont'd)

Visual Impairment Services Teams, Blind Rehabilitation Centers, and Psychiatric-Blind Rehabilitation Clinics. All VA hospitals and outpatient clinics provide services which blinded veterans need. The Blind Rehabilitation programs give categorical services to blinded veterans no matter where they might reside.

- Visual Impairment Services Teams are outpatient functions with continuing evaluative and service responsibilities for blinded veterans who have service connected conditions. The latest fully compiled report on this program shows that in a three month period 1,232 veterans were scheduled for the yearly review of their circumstances and service needs. Of these 1,232 blind veterans, 224 were between 55 and 64 years of age, 109 were 65 to 74, 126 75 to 84, and 14 were 85 years of age or older. This means that when considering the entire eligible group of 5,529 blind veterans who are served on a yearly basis, approximately 34% are over 55 years of age. All of the 1,232 blinded veterans were invited to the outpatient clinics for a review, but some could not come.
- Psychiatric-Blind Rehabilitation Clinics. Three are in existence and two others are planned for the foreseeable future. These Clinics accept any blind and psychiatrically ill veteran who is in position to benefit significantly from categorical services for blindness. During Fiscal Year 1972, 67 veterans were given the services of these clinics. Of those, 28 were above the age of sixty. The oldest veteran served was 81. An example of the success of this program is that quite a number of veterans who had been hospitalized for many years are now performing outside any hospital or in a hospital where they require much less care.
- Blind Rehabilitation Centers. Veterans go to these three Blind Centers to learn how to live much better lives out in the community and assume the responsibilities which they should. In Fiscal Year 1972, the three Centers served 270 veterans. Of these, 37 were sixty or older, with a number of others very near to that age. The VA is upgrading its programs of unusual optical aids for veterans with very low vision. Blind Centers are deeply involved now and satellite clinics are planned. Since sight loss occurs much more often in persons above 60, these aids will be of much value in restoring reading abilities to older veterans.

ORGANIZING TO
MEET THE NEEDS
OF SPECIAL GROUPS
(Cont'd)

The Veterans Administration is expanding its facilities to care for speech and language disorders.

The elderly patient is far more likely to experience disordered communication than is true of a young patient. Speech and language disorders rise from 2 percent of the young adult population to as high as 45 percent of the elderly. Since language and communication are man's most uniquely human attributes, it is of crucial importance that attention be directed to overcoming significant disturbances. Cancer of the larynx may result in removal of the organ that produces voice. Approximately 50 percent of stroke patients are left with brain damage that interferes with their ability to understand language and to express their thoughts (aphasia).

--Speech Pathology services have been established at 80 hospitals. Patient care, training and research are primarily concerned with the disorders that are most frequently found in the older patient.

--Elderly veterans with aphasia totaled approximately 55,000 patient visits in the past fiscal year. During that same period there were approximately 12,000 patient visits for the older patient who had experienced surgery of the larynx. Efforts also are made to counsel the families of veterans with speech and language disturbances.

o The Veterans Administration is working to help overcome the problem of hearing impairment.

Loss of hearing is a serious condition that afflicts all age groups but especially the elderly. Under 25 years of age, only 1 percent have hearing loss. Between ages 65 and 74, the number rises to 13 percent. Over 75 years, 26 percent have deficient hearing. Among the elderly, in addition to loss of acuity, there frequently is a form of degeneration that adversely affects understanding of speech.

The Veterans Administration is providing programs designed to help veterans overcome the handicaps of defective hearing.

--Audiology Centers have been established at 34 VA hospitals with specialized equipment and highly trained personnel.

--Elderly veterans were aided by the completion of approximately 28,000 diagnostic examinations of hearing in Fiscal Year 1972.

ORGANIZING TO
MEET THE NEEDS
OF SPECIAL GROUPS
(Cont'd)

--Aging veterans benefited from the approximately 5,000 patient visits for aural rehabilitation in the past fiscal year. These visits include instruction in lip reading and orientation to hearing aid usage.

--Hearing aids are evaluated for VA by the National Bureau of Standards (NBS) and the findings are made available to the general public. In Fiscal Year 1972, approximately 2,500 elderly veterans were provided with hearing aids. The NBS testing enables us to procure hearing aids with the most favorable performance characteristics. After a medical examination, the audiologist helps in the selection of a particular hearing aid for each eligible veteran who requires one.

RESEARCH AND
TRAINING

Summary of Conference Recommendations:

The recommendations of the Conference concerning research and training are treated together because, in a sense, both activities form a continuum. Research begins with the preparation of manpower capable of performing research. To prepare manpower adequately requires the constant expansion of knowledge which is accomplished through research.

Five Sections recommended that in expanding Federal support for services to the elderly the Federal government also expand support for training and research. The Training Section went even further in recommending that a portion of all services resources be earmarked for training while the Research Section recommended that 3.5 percent of all Federal resources appropriated from general revenues for meeting the needs of older persons be devoted to research or training.

An opposite view seems to have been suggested by the Section on Education which recommended that a higher priority for the use of additional resources for adult education was expansion of existing services over against more research.

Five groups called for increased funding either for aging research or training of manpower to work in aging or both. The Training Section indicated that this increase should occur at all levels of government, not just the Federal, and in the private sector. A corollary concern expressed by two groups was that any funds appropriated by Congress for supporting aging research and training should be utilized by the Executive Branch with dispatch.

Three Sections recommended the creation of a National Institute on Aging to further support aging research and training. Two called for the Institute to conduct and support research and training, while the other called for it to coordinate Federally supported research and training. The Training Section called for the earmarking by the Institute of funds for training.

RESEARCH AND
TRAINING
(Cont'd)

The expansion of Federal support for the preparation of health manpower was also recommended. The Income Section recommended that the Federal government assume responsibility for the preparation of an adequate supply of health manpower.

The Conferees indicated research and training should not be exclusively conducted by institutions of higher learning. Within academic institutions, they should be conducted both within traditional disciplinary arrangements (e.g., psychology) as well as interdisciplinary arrangements (e.g., institutes).

The Sections on Education and Health and the Special Concerns Session on Aged Blacks recommended that within disciplines specialists on aging be trained. The preparation of specialists in the spiritual well-being of older persons, housing for the elderly, problems of the aged deaf, and rehabilitation of the disabled elderly was recommended. In-service training on aging was recommended as was the certificate training of paraprofessional personnel. Along these lines, the training of older persons as nutrition aides, legal aides, and as classroom lecturers about the circumstances of older persons was also recommended.

The Sections on Training and Retirement Roles recommended that more material on aging be inserted into the curricula of all pre- and post-professional training, while the Section on Health and the Session on the Religious Community made the same recommendations with regard to the training of health and religious personnel. On the issue of what the content of training on aging should include, it was recommended that more material be developed on nutrition, the interface between improving the circumstances of the elderly and their sense of spiritual well-being, the problems of the aged deaf, and the special circumstances of being old and a member of a minority group.

The following areas of concern were also noted as being worthy of more research: the social impact on older persons of various living arrangements; the impact of attempts to improve the circumstances of the elderly on their sense of spiritual well-being; eye disease of the elderly; consumer problems of the elderly; problems of disabled older persons; the application of modern technology to alleviate the problems of the elderly; the influence of nutrition on the aging process; continuing evaluation of the nutritional status of older persons; problems of the elderly deaf; the needs of older persons for opportunities for recreation; alternatives for financing a comprehensive package of

RESEARCH AND
TRAINING
(Cont'd.)

services for older persons; data gathering on aged blacks; differences between the life expectancy of minorities and the rest of the population; and the special circumstances of the Asian and Spanish-Speaking elderly.

Recommendations were also made concerning making better use of the findings and experiences of research and demonstration projects. The Session on Aged Blacks called for independent evaluation of all demonstrations to determine the extent to which findings warranted incorporation into ongoing methods of service delivery. The Sections on Research and Retirement Roles called for the development of mechanisms to assure that successful demonstration projects are assured continued funding after the period of demonstration is completed. Another related concern expressed by the Sections on Research and Training and three other groups was that research and demonstration findings be more widely and efficiently disseminated.

A major thrust in the Conference deliberations which dealt with aging research and the training of manpower to work on aging was the attention by researchers to minority groups. The Section on Research, suggested that such attention should be assured by allocating a proportion of total Federal expenditures for aging research, including the training of researchers, for minority groups based on their share of total U.S. population. A recommendation of the Session on Aging and Aged Blacks asked that 30 percent of the funds of the proposed National Institute on Aging be devoted to problems of the black aged or in the absence of such an Institute for a similar share of existing Federal support for aging research.

The Research and Training Sections and the four Sessions on the minority elderly recommended special efforts for recruitment of minority groups, including the offering of incentives and the earmarking of training funds. The Session on Blacks recommended that 12 percent of Federal training funds in aging be allocated for blacks. However, the Session recommended against offering a priority to low income students from minority groups and urged instead that funds go to minority students with the highest potential, regardless of income. The Session went on to make four specific recommendations on how, in its view, Federal funds allocated to the training in aging of blacks could be best spent.

RESEARCH AND
TRAINING
(Cont'd)

Finally, conferees expressed three miscellaneous concerns about research and manpower preparation. The Training Section recommended that decision making concerning the development and execution of policy on manpower preparation should involve the participation of training institutions, providers of services, and older persons. The Research Section recommended that special efforts be made to involve women for such purposes. The Retirement Roles Section, suggesting that the shortage of trained manpower could be ameliorated through the use of retired professionals, urged that a system be developed by which States to which such persons moved in retirement licensed them to practice using reciprocity instead of an examination as the basis for licensing.

Administration Response: The Administration will provide support for research, demonstration and training in the field of aging in a manner that is consistent with the overall policies which it has developed for Federal involvement in these activities.

- o In the field of research the Administration is committed to a sharpening up of the Federal government's objectives in particular fields and then coordinating and focusing Federal resources on the achievement of these objectives.

The President set forth his convictions relative to the importance of research in the field of aging in his Message on Aging on March 23, 1972 when he said:

"It is important that the same scientific resources which have helped more people live longer lives now be applied to the challenge of making those lives full and rewarding for more Americans. Only through a wise investment in research now, can we be sure that our medical triumphs of the past will not lead to social tragedies in the future."

"What we need is a comprehensive, coordinated research program, one which includes disciplines ranging from biomedical research to transportation systems analysis, from psychology and sociology to management science and economics."

- o The Administration will take steps to insure that the Federal departments and agencies that have resources available for research in aging work as a team in order to achieve the comprehensive, coordinated program referred to by the President in his message. The specific steps that will be taken to achieve this objective will be announced shortly.

RESEARCH AND
TRAINING
(Cont'd)

There is in existence a Technical Advisory Committee on Aging Research. This Committee, made up of outstanding leaders from outside government, will make recommendations to the Administration directed toward the development of a meaningful program of research in aging.

The Administration believes that the most effective means for the Federal government to advance research in the field of aging is to tap all of the Federal government's resources and relate them to agreed-upon objectives. This process will result in the involvement of more leaders in more disciplines and the commitment of more resources than would be the case if an Institute on Research in Aging were to be located in just one of the many departments and agencies involved in research in aging. If an Institute should be created there would be a natural tendency for other departments and agencies to feel that they had been relieved, at least partially, from some of their responsibilities. The Administration plans to move in just the opposite direction and take action which will impress on these agencies the importance of their responsibilities in the area of aging research.

- o Some of the agencies that will be involved in the development of the comprehensive and coordinated research program called for by the President will be the following:

--The National Institutes of Health. More than \$1 billion is spent annually by the National Institutes of Health on research involving many diseases which affect older persons.

The National Institutes of Health is the agency which the Congress of the United States has charged with the responsibility for research on disease and aging processes. It has an annual budget of about \$1.9 billion of which over \$1.0 billion goes for research important to older persons.

For example, arteriosclerosis leading to the obstruction of the vessels supplying blood to the heart, brain and legs is particularly important to those over 65 years of age, causing much suffering and more than half of the mortality in that age group. The National Heart and Lung Institute supports a large research effort directed at arteriosclerosis.

The second major cause of death in older persons is cancer. The National Cancer Institute supports a massive program of research on the cause, prevention, and treatment of various types of cancer.

RESEARCH AND
TRAINING
(Cont'd)

Every one of the ten Institutes that make up NIH supports research efforts that improve our chances of preventing and treating the diseases of older persons.

In order to increase the effectiveness of the NIH activities in this area, the decision has been made to create a Center for Aging Research within the National Institute for Child and Health and Human Development. This center will coordinate the activities of the Gerontology Research Center, a research facility for Government scientists conducting aging research, and the Adult Development and Aging Branch through which funds pass to support non-Governmental scientists working on aging. The combined total of their expenditures is over \$12 million per year.

The National Institute of Child Health and Human Development studies the biological, psychological, and social aspects of aging as well as the general medical aspects of aging. The NICHD is concerned with developmental and deteriorative changes across the entire span of life from conception to death. The research on aging supported by NICHD deals with the general deteriorative processes which gradually transform a young person into an old one, more than with specific disease entities. These changes occur in all the systems of the body and cause the gradual losses in functional ability that, while they may be severe, do not ordinarily have names attached to them as do the specific diseases. They include changes in endocrine function, immunological competence, mental function, and a host of other deteriorative processes. Study of these changes will form the new frontier of medicine as the current major causes of death--vascular disease and cancer--are brought under control.

--The National Institute of Mental Health. The Institute conducts a wide range of research projects on psychological, social and emotional aspects of aging. Examples include:

- a. Ohio State University researchers are exploring the social and personal relationships involved in the decision-making when an elderly person or couple moves into a retirement or nursing home.
- b. Another study, conducted by Boston University, is studying the social factors which facilitate paid and unpaid work and second careers for the elderly.
- c. The Harvard University Medical School is studying suicide and suicide prevention in the elderly. This is a large scale interview study which focuses on depression, attitudes toward death, suicidal impulses, the extent of current life stresses, and general morale

- The National Center for Health Services Research and Development. This center is engaged in a wide range of research concerning older persons. For example, special research efforts by the Center, in conjunction with the National Center for Health Statistics, and the Community Health Service, will be geared towards defining quality of care in nursing homes, monitoring nursing home utilization, and measuring the effectiveness of alternatives to institutional care.
- The Administration on Aging. Seven million dollars is slated to be spent in Fiscal Year 1974 on a wide range of high-impact projects which promise short-term results. The purpose of this activity is to:
- a. Provide a reliable knowledge base for the development and refinement of National, State and community programs for older persons;
 - b. Demonstrate how this knowledge can be used effectively by public and private agencies; and,
 - c. Provide linkage of research to practical outcomes.

Current emphasis is on identifying:

1. Impediments to independent living which result in institutionalization;
2. Costs of community care and in-home care in comparison with the costs of institutional care for different sub-groups within the target population.
3. Structural or institutional changes required to increase the options for independent living.

During the past several years, emphasis was placed on:

1. Developing and refining a system to advance research utilization which assures that relevant research findings are known and used by those responsible for the delivery of services, planning the methods of service delivery and policy making.
2. Continuing the development of a system of social indicators to assess the needs and attitudes of the elderly so that States can use the resulting data for a State-wide planning base;
3. Developing a model for a State-wide information and referral system which links services to clients.
4. Studying ways and means of improving nutrition services for the elderly; and,

RESEARCH AND
TRAINING
(Cont'd)

5. Examining the extent to which inadequate public transportation or personal difficulties lead to reduced mobility and, thereby, the isolation of older persons.

--The Social Security Administration. SSA is conducting hundreds of research projects which deal with the well being of older Americans.

- a. In the income area, these efforts include large scale surveys of the income status of the elderly, the adequacy of earnings replacement and benefits under private and public employee retirement systems.
- b. In the area of Medicare, several projects are studying the utilization of medical facilities by Medicare patients, the benefits of new methods of health services delivery, the interaction between private health insurance and Medicare coverage, and the advantages and disadvantages of extending coverage to new cost areas, such as prescription drugs.
- c. In addition, the Social Security Administration will mount a national evaluation of the effect of Supplementary Security Income on the economic status and general well-being of the low-income elderly.

--The Veterans Administration. The hospitals and clinics of the Veterans Administration are conducting hundreds of research projects into the aging processes and chronic diseases. Of special concern to older persons are the agency's investigations in diabetes and diabetic retinopathy, endocrinology of the aging and aging bone metabolism. During 1972, the Veterans Administration obligated over \$4.6 million for research projects in aging.

--Department of Housing and Urban Development. The Department of Housing and Urban Development is supporting significant research related to the needs of older persons. Some illustrations of research underway, or completed in 1972 are as follows:

- a. Operation BREAKTHROUGH is a major research and demonstration project in the field of housing. In the project, demonstration housing was designed specifically for older persons under the elderly housing provisions of the low rent public housing programs located in Memphis, Kalamazoo and Sacramento. The units include experimental safety features such as smoke detectors, personal silent alarms, and shower stalls instead of bathtubs. Operation BREAKTHROUGH programs also developed innovative site planning and unit designs which result in more accessible dwellings and community facilities.

RESEARCH AND
TRAINING
(Cont'd)

- b. The Housing Allowance Experimental Program was begun in 1972 to evaluate housing allowances as an alternative to other concepts for housing assistance. Rent allowances are provided directly to the individual or family to make up the difference between his rent paying ability (25% of income) and the rent of available housing units. Residents find and select their own dwellings within certain cost limits.
- c. The Public Housing Management Improvement Program is a major effort to demonstrate and evaluate improved methods of operation and management of public housing. HUD provides research and technology funds to local housing authorities who, together with local governments, are responsible for the design and implementation of the approaches taken. In five cities, New Haven and Hartford, Connecticut, San Juan, Puerto Rico, Greensboro, North Carolina, and Atlanta, Georgia, the program contains service components specifically developed to meet the needs of older residents.
- d. HUD negotiated a contract with the Law Enforcement Assistance Administration designed to investigate the problems of residential security faced by older persons.
- e. The Brown Engineering Company Home Accident Study delineated the cause of home accidents by age groups and reveals the relationships of certain home features that have proved dangerous to elderly residents. Findings of this study will be reflected in the Minimum Property Standards or the Manual of Acceptable Practices now under revision.
- f. An evaluation of the Fall River, Massachusetts Housing for the Handicapped Study was completed in 1972 and the full report will be published by HUD in 1973. The majority of the residents of this project were elderly as well as handicapped. Findings will provide data that may be used for forestall premature reliance on costly medical institutions rather than continuing in a more normal living environment.
- g. The Fisk University Mobility Study provides data related to relocation programs for the elderly, and the effect of mobility on the availability or lack of public transportation and on the health, income and service needs of the elderly. The study, completed in 1972, was conducted in Nashville, Tennessee. The results have particular significance for minority elderly and policies and programs related to them.
- h. The Housing Annuities for the Elderly Study was conducted some time ago by Professor Yung Ping Chen of the University of California and is now in the process of being published. The study was done among homeowners

RESEARCH AND
TRAINING
(Cont'd)

aged 55 to 75 in Los Angeles County to measure their attitude toward the idea of converting the homeowners equity into a flow of monthly income for life.

- i. Forecasting International, working under a HUD contract completed a state of the art study and bibliography on housing for the elderly with special emphasis on the problems of management in such housing.

--Department of Transportation. As part of its overall effort to improve transportation for all citizens, the Department of Transportation has conducted and currently has underway a number of research projects designed to enhance the mobility of the nation's older citizens. Examples of this activity are:

- a. A dial-a-ride demonstration project in Haddonfield, New Jersey.
- b. Special service demonstration projects designed to demonstrate innovative services and equipment to serve the special transportation needs of the elderly in communities in Connecticut, Montana, Florida, Oregon and Rhode Island.
- c. An analysis of the transit needs of the elderly in four diverse cities.
- d. A TRANSBUS Program in which special buses are being developed and designed to ease the accessibility of bus transit for wheel chair passengers.
- e. Two new state-of-the-art vehicles that accommodate wheel chairs, currently being tested at DOT's test center in Colorado.
- f. A preliminary design for a specification development effort to insure that new rapid rail transit passenger carriers will address the problems of the handicapped and elderly.
- g. Demonstration planning grant, awarded in Orlando, Florida, which supports the design of a transportation demonstration program aimed at testing innovative transportation services for all elderly.
- h. A study sponsored by the Metropolitan Washington Council of Governments that includes an analysis of transit service for the handicapped and elderly.

--Department of Labor. The Department of Labor has conducted a number of research studies that concern older persons. Several of the Department's important age-related studies include:

RESEARCH AND
TRAINING
(Cont'd)

- a. A landmark study, "The National Longitudinal Studies of Labor Force Behavior" conducted by the Ohio State University has been following a group of about 5,000 men, 45 to 59, since 1966 through annual surveys conducted by the Bureau of the Census. Comprehensive information has been collected on employment and unemployment experience, occupation, income, education and training, family background, health, work attitudes, etc., for the primary purpose of explaining labor force experience and behavior, particularly the problems encountered as men near retirement age.
- b. The U.S. Bureau of Labor Statistics has conducted periodic surveys of pension plan documents filed with the U.S. Department of Labor under the provisions of the Welfare and Pension Plans Disclosure Act. The BLS recently entered into a contract with the Manpower Administration to study pension plan provisions that may give rise to involuntary retirement. The survey is based on a sample of approximately 1,600 plans. Data on the number of active employees covered by the relevant provisions of pension plan contracts in 1967 and 1971 are now being analyzed. Findings from this survey will be published in the Monthly Labor Review early in 1973. In addition, data from a follow-up survey on retired employees' experiences are expected to be available in 1973.
- c. A report is currently being prepared by the Economic Statistics Administration (ESA) based on National Longitudinal Survey data having to do with involuntary retirement. The ESA is planning (1) a study of other Federal agency survey findings, including the survey of Newly Entitled Beneficiaries and the Retirement History Survey by the Social Security Administration and (2) an employer survey on involuntary retirement to be conducted by the Bureau of Labor Statistics.

--Atomic Energy Commission. Current research by the Atomic Energy Commission is directed toward the goal of obtaining a better understanding of effects of radiation on the body over time, including the relationship to the degenerative processes responsible for senescence. Information of this sort is essential to the formulation of radiation protection guides and the estimation of biological costs of nuclear energy activities. Data obtained may also contribute toward the more effective use of radiation in therapy. Data on the clinical and epidemiological aspects of aging are valuable, in turn as part of the total body of knowledge needed to understand the consequence in a man of chronic, low-level radiation stress, such as may occur in certain occupational situations. The projected level of funding in Fiscal Year 1973 for the support of research on aging at AEC-owned (on-site) laboratories and off-site contractor facilities is \$4.5 million.

RESEARCH AND
TRAINING
(Cont'd)

--National Science Foundation. The National Science Foundation is supporting research on the societal impacts of a changing age structure in the United States population and on assessing programs and institutions necessary to meet the changing needs of the aged.

--National Aeronautics and Space Administration. This agency is seeking to determine ways in which the benefits of their general research can be made applicable to older Americans.

Three of NASA's "application teams" are working in the area of medical equipment improvements, a subject of vital concern to the elderly. The agency's technology has developed several switching devices enabling bed-ridden patients or paralyzed persons to operate appliances or send signals by using limited motions such as eye movements. A new plastic foam has been adapted as a superior padding material for wheel chair cushions or bed pads. A major development is a compact mobile electrocardiograph machine which can be attached to a walking patient. Less expensive home-type tape recorders for transmitting EKG signals to hospitals and clinics may in the future help to eliminate costly hospital visits and enable patients to be treated at home.

--The Law Enforcement Assistance Administration. The Law Enforcement Assistance Administration is conducting a major nationwide victimization study designed to determine the incidence of crime experienced by older persons aged 65 and older. Data obtained from the study will show the types of crimes experienced by older persons, the relative possibility of them being victims, and the attitudes of older persons toward crime. With the information, it is hoped that more will be known about the specific needs of older persons concerning crime and personal security.

- o Administration policies in the following areas will help institutions of higher learning to initiate, strengthen and expand programs designed to attract persons to and prepare them for careers in the field of aging:
 1. Providing financial assistance for students in higher education with the understanding that they will then be free to use this assistance in order to pursue any specialized program they desire to pursue.
 2. Providing central coordination for the Federal government's programs of research in aging so that the large investment of resources in this area will be related to agreed-upon objectives.

3. Using Federal dollars to encourage the development of comprehensive and coordinated service programs for older persons at the community level.

The discussion that follows relates each one of the basic policies identified above to training in the field of aging.

- o. Institutions of higher education will be helped in attracting persons to and preparing them for careers in aging through the policy of providing financial assistance for students in higher education with the understanding that they will then be free to use this assistance in order to pursue any specialized program they desire to pursue.

Consistent with this policy, the President's 1974 Budget includes full funding for a new program of basic opportunity grants for undergraduate education authorized by the Education Amendments of 1972. In addition, work-study funds and guaranteed and subsidized student loans will be available for both undergraduate and graduate training.

It is estimated that 1.5 million undergraduate students will receive \$959 million under the basic opportunity grants program; that 1,673,000 undergraduate and graduate students will obtain guaranteed student loans with many of the undergraduates in this group also receiving basic opportunity grants; that 545,000 undergraduate and graduate students will be employed in work-study programs; and, that colleges and universities will be in a position to make direct loans to approximately 259,000 undergraduate and graduate students. These Federal programs will be supplemented by public and private scholarship and loan programs.

Support for students already enrolled in specialized training programs, including those in the field of aging, has been provided for the academic year 1973-74. New students pursuing specialized training, including the field of aging, during that academic year and both new and continuing students beginning academic year 1974-75 and thereafter, will receive financial assistance from the Federal government if they qualify for the general student assistance program outlined above.

It is the Administration's belief that the Federal government's general student assistance program, public and private scholarship and loan programs, family savings and income from work will together remove the financial problem as a barrier to higher education.

RESEARCH AND
TRAINING
(Cont'd)

It is also the Administration's belief that the rapidly unfolding and attractive career opportunities in the field of aging, the need for trained personnel, and the increasing number of persons who have developed a strong desire to participate in the field of aging will all combine to increase substantially the number of undergraduate and graduate students, for whom financial barriers have been removed, who will decide to participate in higher education training programs in the field of aging. In most instances these decisions will be based on a strong commitment to the field of aging rather than on the conclusion that the financial assistance for a training program in aging is more attractive than a training program in some other area.

This trend can be accelerated by developing and making available to both undergraduate and graduate students better information on career opportunities in aging and better supply-demand data. The trend can and will be accelerated also as a result of the continuing implementation of the two Federal policies discussed below.

- o Institutions of higher learning will be helped in attracting persons to and preparing them for careers in aging by the policy of providing central coordination of the Federal government's program of research in aging so that the large investment of resources in this area will be related to agreed-upon objectives.

The President's directive to develop a comprehensive and coordinated research and demonstration program for the field of aging will have the following results for colleges and universities.

- It will provide them with a clear picture of the Federal government's objectives
- It will make clear how each Federal department and agency fits into these objectives
- It will identify the sums available to the Federal departments and agencies for research and demonstration programs in aging
- It will spell out the procedures to be followed by the colleges and universities that have the competency and the desire to participate in the programs of one or more of the agencies.

If a college or university receives grants for participation in one or more of the Federal government's research programs it will have the following results in the area of training for work in the field of aging:

RESEARCH AND
TRAINING
(Cont'd)

- The meaningful involvement of the college or university in this aspect of the field of aging-- with financial support from the Federal government-- will capture the attention of both undergraduate and graduate students and will help to attract them to the field of aging.
- The budgets on which the grants will be based will provide for compensating faculty members for that portion of their time spent on the project or projects and will help, therefore, to attract and retain scholars in the field of gerontology.
- The budgets on which the grants will be based will provide for involving and compensating both undergraduate and graduate students for participation in the projects and will help, therefore, to provide them with worthwhile learning experiences and additional financial resources.

- o Institutions of higher learning will be helped in attracting persons to and preparing them for careers in aging by the policy of using Federal dollars to encourage the development of comprehensive and coordinated service programs for older persons.

The initiation, strengthening and expansion of such programs in many communities will have the following results for colleges and universities:

- It will provide them the opportunity to become involved in State, area and community planning for the coordinated delivery of essential services to older persons.
- It will provide them the opportunity to offer courses for older persons as a part of the comprehensive service programs.
- It will provide them the opportunity to offer both short-term and long-term programs to train or update the training of persons who operate the service programs for older persons.

If a college or university decides to take advantage of the opportunities for service to the field of aging provided by the development of these comprehensive community-based service programs for older persons, it will have the following results in the area of training for work in the field of aging:

- The meaningful involvement of the college or university in these community-based service programs will capture the attention of both undergraduate and graduate students and will help to attract them to the field of aging.

RESEARCH AND
TRAINING
(Cont'd)

- Undergraduate and graduate students will have opportunities for being involved in both the planning and operation of these programs and, as a result, will learn by doing and, at the same time, add to their financial resources.
- Fees paid for participation in courses for older persons and in short-term and long-term training programs for those who are recruited to operate the service programs for older persons will help to strengthen the financial base of the institution's total program in the field of gerontology.
- o Colleges and universities will from time to time have the opportunity to participate in training programs designed to meet the specific needs of Federal departments and agencies for trained personnel in aging.

The Department of Health, Education and Welfare helped to establish a nationwide network of training programs designed to increase the knowledge and to improve the skills of personnel engaged in providing patient care in nursing homes. Training for 40,000 nursing home staff members is programmed for completion by July of 1974. In addition, university-based training for State nursing home surveyors has been completed for 1,000 surveyors.

Under the Federal Employees Training Act, to take another example, Federal agencies can finance the cost of making it possible for personnel working in the field of aging to obtain necessary specialized training in aging from colleges and universities.
- o The Administration will provide a focal point within the governmental structure for those colleges and universities that have made or will make a commitment to the field of aging.

The purpose of providing this focal point is to assist such institutions in working with the Federal departments and agencies that:

 - are capable of providing information relative to opportunities for careers in aging, both inside and outside of their departments;
 - are deeply involved in research and demonstration programs in the field of aging;
 - are responsible for taking the lead in persuading and helping states and communities to expand comprehensive and coordinated service programs for older persons, and
 - are in need of assistance from colleges and universities in order to meet their own specific needs for trained personnel in the field of aging.

RESEARCH AND
TRAINING
(Cont'd)

In this manner, coupled with the general student assistance program, the Administration believes that the Federal government can help colleges and universities sponsor significant scholarly activities in gerontology and, at the same time, play a major role in responding to manpower demands as they develop in the field of aging.

A NEW ATTITUDE
TOWARDS AGING

Summary of Conference Recommendations:

Many of the Conference delegates, representing a number of Sections and Special Concerns Session, pointed out the need for a new national attitude toward the elderly that would recognize their strengths, limitations, untapped potential, and inner resources. Principal among the suggestions for achieving such a new attitude were efforts to remedy the lack of public understanding of the conditions of old age. Six groups suggested one or the other or both of two possible solutions: (1) a fairly broad public education campaign using a variety of media and (2) the introduction into the elementary and secondary curriculum throughout the Nation of age-graded material descriptive of the phenomena associated with growing old. The Section on Education urged that all resources of the educational community be utilized to this end.

The Special Concerns Session on Youth and Age and the Section on Facilities, Programs, and Services recommending yet another means of changing attitudes said that educational institutions provided a ready setting for personal interaction between young and old, and indicated the advantages of supporting opportunities for such interaction. Suggesting that the lack of involvement in society and the lack of employment opportunities, among other problems, were shared by both young and aged, delegates noted that elderly could profit from the vitality and mobility of the young. In turn, the young could gain in knowledge and experience from association with the old and come to understand and appreciate the potential of the elderly for a unique contribution to society.

Several groups suggested that central to the development of a new national attitude on aging was the assumption by older persons of responsibility for serving as their own advocates. The Sections on Education and on Retirement Roles and the Session on the Elderly Poor offered recommendations which urged the involvement of older persons in civic affairs, which encouraged their education toward understanding the issues which affect them, and which suggested that they engage in social action and political organization.

By directly expressing themselves, the elderly would, it was implied, cast a less dependent image.

A NEW ATTITUDE
TOWARDS AGING
(Cont'd)

One subject for such direct expression, if the Conference recommendations are an accurate gauge, would be the granting of preferential considerations and the elimination of penalties. Protection was recommended against age discrimination in employment, mandatory retirement, automatic relicensing requirements, higher automobile premiums or loss of insurance, loss of credit privileges, and denial of opportunities for rehabilitation. Preferential treatment was asked for transit fares and property tax relief.

Administration Response: Consistent with the resources that may be available at any given period of time the Administration will work with State and local governments and the private sector in order to facilitate progress in the following areas of activity -- areas which can contribute to the change in attitude called for by the President in his address to the delegates of the White House Conference on Aging.

- o Focusing attention on the needs of older persons.

The President provided visible evidence of his commitment to give special consideration to the needs of the elderly by establishing a Cabinet-level Committee on Aging and by appointing a Special Consultant on Aging. Steps are being taken to provide for similar positions in the Departments and agencies of the Federal government that have responsibility for programs in the field of aging.

- o Developing a better understanding of aging and the aged by preparing materials for the media and including appropriate materials in the curriculum at all levels of education.

Older persons are the victims of a lack of understanding of both aging and the aged. They will continue to be the victims of "ageism" until this situation is corrected. Both the communications and educational communities can help improve understanding. This Administration plans to consult and work with leaders in the communications and educational fields in an effort to transform talk into action.

- o Providing opportunities for interaction between the young and older adults.

Both the religious and educational communities are in a position to open up far more opportunities for interaction than are currently available. It has been demonstrated that when such opportunities are opened up, young persons very quickly adopt new attitudes toward older persons and despair in the lives of older persons is often replaced with hope.

A NEW ATTITUDE
TOWARDS AGING
(Cont'd)

The Federal government is taking action in this area by:

- Encouraging, through the Extension Service Offices of the Department of Agriculture, the strengthening of programs to recruit and train both young and older volunteers for service to older persons and to provide companionship.
 - Exploring, with the National Center for Voluntary Action, ways to expand "Adopt a Grandparent" programs at the local level.
 - Strengthening and enlarging programs such as the Foster Grandparents and the Retired Senior Volunteers. Similar emphasis is being placed on opening up opportunities for interaction between the young and old in programs such as Vista and the Peace Corps.
- o Involving an increasing number of volunteers from the private sector in providing services for older persons.

The work of the National Steering Committee of National Voluntary Organizations in endeavoring to provide support for programs in at least 300 communities for services to older persons in their own homes or other places of residence is an illustration of what is being done in this area.

Project FIND, as described in an earlier part of this report, will make it possible for thousands of volunteers to begin the process of becoming acquainted with the world of the older person.

- o Opening up increased opportunities for older persons to become involved in community service programs both on a paid and on a volunteer basis.

The Nation will come to have an understanding and an appreciation of the contributions that the older persons can make to society only if we overcome the prejudices that now stand in the way of providing them with the opportunity of making these contributions. As indicated in another portion of this report, manpower programs for older workers are proving to be of real assistance, not only to the older persons, but to the communities where they operate. They are demonstrating that it is possible to overcome "ageism".

A NEW ATTITUDE
TOWARDS AGING
(Cont'd)

- o Endeavoring to obtain a wider acceptance of the belief that no age limits should be attached to the concept of the dignity and worth of each human being.

The religious community, both by its teachings and its deeds, is in a position to make significant contributions to the achievement of this objective. If this is done, an increasing number of persons will refuse to tolerate policies that put older persons in an inferior or secondary position. There will then be, in the President's words, a "new National attitude toward aging in this country -- one which fully recognizes what America must do for its older citizens and one which fully appreciates what our older citizens can do for America."

CONFERENCE
FOLLOW-UP

Summary of Conference Recommendations: Several groups made recommendations which reflected their desire that the momentum achieved through the Conference process not be lost. Three groups recommended some form of organization for following up to see that action had taken place on recommendations or to provoke such action. One of these, the Session on Aged Blacks, recommended that the Federal government underwrite the cost of participation in a follow-up mechanism. Two groups recommended periodic reporting back to delegates on what progress has occurred.

The Employment and Retirement Section recommended that a Conference be held once every four years, eighteen months before each Presidential election. Another recommended that in the next Conference one Section be set aside for an unfettered, free-wheeling examination of the assumptions which underlie aging in this culture, while another requested that the idea of separate conference components for consideration of problems of minorities be built into all follow-up State Conferences as well as the next National Conference on Aging.

Finally one group recommended that each State retain its delegates as an advisory board.

Administration Response: This Administration shares the concern of the delegates that the momentum achieved through the conference process should be maintained.

The following steps have been or will be taken:

- o As directed by the President, a Post Conference Board of the White House Conference on Aging has been created.

CONFERENCE
FOLLOW-UP
(Cont'd)

One hundred and five persons accepted invitations to serve on the Board under the leadership of the Chairman of the White House Conference on Aging. The Board includes many of those persons who served on the Pre-Conference Board, who were delegates to the Conference, who are expert consultants, and who served as leaders of the subject matter Sections that were established at the Conference. Twenty percent of the membership of this Board is made up of minority group persons.

- o At its first meeting, the Post Conference Board adopted a resolution to create a series of study panels paralleling the major topics discussed at the Conference.

Each study panel was directed to include as participants the Co-chairman of the appropriate Conference Section; the chairman or a representative of the related Special Concerns Session; a representative of the National Association of State Units on Aging; representatives of youth, minority groups, and national organizations concerned with the elderly; persons from rural and metropolitan areas; and experts in the particular areas of concern.

These study panels are now at work studying the actions taken by the Federal government, State and local governments, and private organizations to implement the Conference recommendations. Reports from the study panels, analyzing action taken to date and offering strategies designed to bring about further action will be considered by the full Board at a meeting on April 27 and 28, 1973, and the results of their deliberations will be issued as soon thereafter as possible.

APPENDIX: SPECIAL MESSAGE ON AGING

APPENDIX: SPECIAL MESSAGE ON AGING

THE WHITE HOUSE

TO THE CONGRESS OF THE UNITED STATES:

When I addressed the White House Conference on Aging last December, I pledged that I would do all I could to make 1972 a year of action on behalf of older Americans. This message to the Congress represents an important step in fulfilling that promise.

Many of the actions which are outlined in this message have grown out of concerns expressed at the White House Conference and at related meetings across the country. The message also discusses a number of steps that have already been taken or that were announced at an earlier date. All of these actions are part of our comprehensive strategy for helping older Americans.

The momentum which has been generated by all these steps -- old and new -- will move us toward the great national objectives which the White House Conference set forth. I pledge that this momentum will be sustained as we follow through on these initiatives and as we keep other recommendations of the White House Conference at the top of our agenda, under continuing review.

This message, then, does not represent the last word I will have to say on this important subject. It does, however, identify those administrative steps which we are taking immediately to help older Americans, along with a number of legislative initiatives which should be of highest priority on this year's Congressional agenda.

We often hear these days about the "impatience of youth." But if we stop to think about the matter, it is the elderly who have the best reason to be impatient. As so many older Americans have candidly told me, "We simply do not have time to wait while the Government procrastinates. For us, the future is now." I believe this same sense of urgency should characterize the Government's response to the concerns of the elderly. I hope and trust that the Congress will join me in moving forward in that spirit.

A COMPREHENSIVE STRATEGY FOR
MEETING COMPLEX PROBLEMS

The role of older people in American life has changed dramatically in recent decades. For one thing, the number of Americans 65 and over is more than six times as great today as it was in 1900 -- compared to less than a 3-fold increase in the population under 65. In 1900, one out of every 25 Americans was 65 or over; today one in ten has reached his 65th birthday.

While the number of older Americans has been growing so rapidly, their traditional pattern of living has been severely disrupted. In an earlier era, the typical American family was multigenerational -- grandparents and even great-grandparents lived in the same household with their children and grandchildren, or at least lived nearby. In recent years, however, the ties of family and of place have been loosened -- with the result that more and more of our older citizens must live apart or alone. The rapid increase in mandatory retirement provisions has compounded this trend toward isolation.

Under such conditions, other problems of older persons such as ill health and low income have become even more burdensome. And all of these difficulties are intensified, of course, for members of minority groups and for those who are blind or deaf or otherwise handicapped.

The sense of separation which has characterized the lives of many older Americans represents a great tragedy for our country. In the first place, it denies many older citizens the sense of fulfillment and satisfaction they deserve for the contributions they have made throughout their lifetimes. Secondly, it denies the country the full value of the skills and insights and moral force which the older generation is uniquely capable of offering.

The major challenge which confronts us, then, as we address the problems of older Americans is the new generation gap which has emerged in this country in recent decades between those who are over 65 and those who are younger. The way to bridge this gap, in my judgment, is to stop treating older Americans as a burden and to start treating them as a resource. We must fight the many forces which can cause older persons to feel dependent or isolated and provide instead continuing opportunities for them to be self-reliant and involved.

If we can accomplish this goal, our entire Nation will reap immense benefits. As I put it in my speech to the White House Conference on Aging, "...any action which enhances the dignity of older Americans enhances the dignity of all Americans, for unless the American dream comes true for our older generation, it cannot be complete for any generation."

From its very beginnings, this Administration has worked diligently to achieve this central objective. To assist me in this effort, I established a special task force on aging in 1969. In that same year, I elevated the Commissioner on Aging, John Martin, to the position of Special Assistant to the President on Aging, the first such position in history. Later, I created a new Cabinet-level Committee on Aging, under the leadership of the Secretary of Health, Education, and Welfare, to ensure that the concerns of the aging were regularly and thoroughly considered by this Administration and that our policies to help older persons were effectively carried out. To provide greater opportunity for older Americans to express their own concerns and to recommend new policies, I convened the White House Conference on Aging -- which met last December and which was preceded and followed by many other meetings at the grassroots level. I asked the Cabinet-level Committee on Aging to place the recommendations of the Conference at the top of its agenda. And I also asked the Chairman of the Conference, Arthur Flemming, to stay on as the first Special Consultant to the President on Aging, so that the voice of older Americans would continue to be heard at the very highest levels of the Government.

One dimension of our efforts over the last three years is evident when we look at the Federal budget. If our budget proposals are accepted, overall Federal spending for the elderly in fiscal year 1973 will be \$50 billion, nearly 150 percent of what it was when this Administration took office. One particularly important example of increased concern for the elderly is the fact that overall Federal spending under the Older Americans Act alone has grown from \$32 million in fiscal year 1969 to a proposed \$257 million in fiscal year 1973 -- an eight-fold increase. This figure includes the \$157 million I originally requested in my 1973 budget, plus an additional \$100 million which I am requesting in this message for nutrition and related services.

How much money we spend on aging programs is only one part of the story, however. How we spend it is an equally important question. It is my conviction that the complex, interwoven problems of older Americans demand, above all else, a comprehensive response, one which attacks on a variety of fronts and meets a variety of problems.

This message outlines the comprehensive strategy which this Administration had developed for bridging the new generation gap and enhancing the dignity and independence of older Americans. That strategy has five major elements:

1. Protecting the income position of the elderly;
2. Upgrading the quality of nursing home care;
3. Helping older persons live dignified, independent lives in their own homes or residences -- by expanding and reforming service programs,
4. Expanding opportunities for older people to continue their involvement in the life of the country; and
5. Reorganizing the Federal Government to better meet the changing needs of older Americans.

A SUMMARY OF MAJOR INITIATIVES

In addition to discussing important actions which have been taken in the past or are now underway, this message focuses attention on the following major items of new and pending business.

1. To protect the income position of older Americans,

The Congress should:

-- enact H.R. 1 as soon as possible, thus providing older Americans with \$5-1/2 billion of additional annual income. H.R. 1 would increase social security benefits by 5 percent, make social security inflation-proof, increase widow, widower and delayed retirement benefits, liberalize earnings tests, and establish a floor under the income of older Americans for the first time;

-- repeal the requirement that participants in part B of Medicare must pay a monthly premium which is scheduled to reach \$5.80 this July. This step would make available to older persons an additional \$1.5 billion -- the equivalent of roughly another 4 percent increase in social security benefits for persons 65 and over;

-- strengthen the role played by private pension plans by providing tax deductions to encourage their expansion, requiring the vesting of pensions, and protecting the investments which have been made in these funds;

-- enact revenue sharing proposals designed to provide the opportunity for significant property tax relief; and

-- enact my proposed consumer protection legislation which deals with problems which are especially acute for older citizens.

The Administration will:

-- continue its investigation of alternative methods for financing public education in such a manner as to relieve the present heavy reliance on property taxes;

-- propose major improvements in the military retirement system, including a one-time recomputation of retired pay;

-- continue the battle against price inflation, with special emphasis in the health care field;

-- develop a program to foster greater awareness among older citizens of their legal rights under the Interstate Land Sales Full Disclosure Act; and

-- develop a program designed to help each State create consumer education programs for older citizens.

2. To upgrade the quality of nursing home care,

The Congress should:

-- make it possible for the Federal Government to assume the entire cost of State inspection of homes receiving payments under the Medicaid program; and

-- approve my request for additional funds for training nursing home personnel.

The Administration will:

-- continue to strengthen and expedite other portions of my 8-point program for upgrading nursing homes, including my commitment to withdraw Federal funds from those homes that refuse to meet standards and to make adequate alternative arrangements for those who are displaced from sub-standard homes; and

-- develop proposals for protecting older persons in the purchase of nursing home services.

3. To help older persons live dignified, independent lives in their own homes or residences,

The Congress should:

-- appropriate the \$100 million I requested for the Administration on Aging in my 1973 budget;

-- appropriate an additional \$100 million for nutritional and related purposes;

-- appropriate \$57 million for other programs under the Older Americans Act, bringing total spending under this act to \$257 million -- an eight-fold increase over fiscal year 1969;

-- renew and strengthen the Older Americans Act, which so many older persons rightly regard as landmark legislation in the field of aging -- extending it for an indefinite period rather than for a specified period of years;

-- create a new, coordinated system for service delivery under this act, so that the Administration on Aging can help develop goals for such services, while State and area agencies create specific plans for achieving these goals; and

-- allow States and localities to use some of the funds now in the Highway Trust Fund to finance their mass transit programs, including special programs to help the elderly.

The Administration will:

-- ensure that Departments and agencies involved in the field of aging identify the portion of their total resources that are available for older persons and ensure that use of these resources is effectively coordinated all across the Government;

-- strengthen the role already played by local officials of the Social Security Administration and other agencies in providing information about Federal services to older persons and in receiving their complaints,

-- launch this summer a new Project FIND -- a program which will enlist the services of Government workers at the grassroots level in an outreach effort to locate older persons who are not involved in Federal nutrition programs and who should be;

-- step up efforts to meet the special transportation needs of older Americans, giving priority to community requests for capital grants that aid the elderly from the Urban Mass Transportation Fund;

-- provide more and better housing for older Americans by issuing new guidelines for two HUD programs to make them more readily applicable to the elderly, by extending the mortgage maturity for the FHA-insured nursing home program, by drawing upon research of the Law Enforcement Assistance Administration to reduce crime, by encouraging the provisions of more space for senior centers within housing projects for the elderly, and by developing training programs in the management of housing for older persons.

4. To expand opportunities for older persons to continue their involvement in the life of our country,

The Congress should:

-- appropriate the funds I have requested for such action programs as Retired Senior Volunteers and Foster Grandparents;

-- authorize the ACTION agency to expand person-to-person volunteer service programs, helping more older Americans to work both with children and with older persons who need their help; and

-- broaden the Age Discrimination in Employment Act of 1967 to include State and local governments.

The Administration will:

-- work with 130 national voluntary groups across the country in a special program to stimulate volunteer action; and

-- develop a national program to expand employment opportunities for persons over 65, through programs such as Senior Aides and Green Thumb, by urging State and local governments to make job opportunities available under the Emergency Employment Act of 1971, by working through the public employment offices to open part-time job opportunities in both the public and private sector, and by reaffirming Federal policy against age discrimination in appointment to Federal jobs.

5. To improve Federal organization for future efforts,

The Administration will:

-- strengthen the Secretary of Health, Education,

and Welfare's Advisory Committee on Older Americans -- providing it with permanent staff capability to support its increased responsibilities;

-- arrange for the Commissioner of Aging, in his capacity as Chairman of the Advisory Committee on Aging, to report directly to the Secretary of Health, Education, and Welfare;

-- create a Technical Advisory Committee on Aging Research in the Office of the Secretary of Health, Education, and Welfare to develop a comprehensive plan for economic, social, psychological, health and education research on aging.

PROTECTING THE INCOME POSITION OF OLDER AMERICANS

Perhaps the most striking change in the lives of most Americans when they turn 65 is the sudden loss of earned income which comes with retirement. The most important thing we can do to enhance the independence and self-reliance of older Americans is to help them protect their income position. I have long been convinced that the best way to help people in need is not by having Government provide them with a vast array of bureaucratic services but by giving them money so that they can secure needed services for themselves. This understanding is fundamental to my approach to the problems of the aging.

The success of this income-oriented strategy depends in turn on giving effective attention to two factors: first, where older Americans' money comes from and second, what it is used for.

Where the Money Comes From: Reforming and Expanding Government Income Programs

The most important income source for most older Americans is social security. Accordingly, improvements in social security have been the centerpiece of this Administration's efforts to assist the elderly. Today, approximately 85 percent of all Americans over 65 receive regular cash benefits from social security, while 93 percent of those now reaching age 65 are eligible to receive such benefits when they or their spouses retire.

Since 1969, social security cash benefits have been increased twice -- a fifteen percent increase in January of 1970 and another ten percent increase one year later. These increases represent a \$10 billion annual increase in cash income for social security beneficiaries. As I suggested, however, in my 1969 message to the Congress concerning social security reform, bringing benefit payments up to date alone is not enough. We must also make sure that benefit payments stay up to date and that all recipients are treated fairly.

My specific proposals for achieving these ends are presently contained in the bill known as H.R. 1 -- legislation which is of overwhelming importance for older Americans. This bill passed the House of Representatives in the first session of the 92nd Congress and is presently pending before the Senate Finance Committee. I continue to believe firmly that H.R. 1 is the single most significant piece of social legislation to come before the Congress in many decades.

Let us consider the several ways in which this legislation would help the elderly:

1. An Additional Increase in Social Security. Under H.R. 1, social security benefits would be increased by an additional 5 percent effective in June of 1972. This increase would provide \$2.1 billion in additional income for older Americans during the first full year that it is effective. It would mean that social security benefits would be one-third higher after this June than they were just 2-1/2 years ago. This represents the most rapid rate of increase in the history of the social security program.
2. Making Social Security "Inflation Proof." Under H.R. 1, social security payments would, for the first time, be automatically protected against inflation. Whenever the Consumer Price Index increased by 3 percent or more, benefits would be increased by an equal amount. Payments that keep pace with the cost of living would thus become a guaranteed right for older Americans -- and not something for which they have to battle again and again, year after year.
3. Increased Widows' Benefits. About 58 percent of the population age 65 and over are women, most of whom depend primarily on social security benefits earned by their husbands. Under the present law, however, widows are eligible for only 82-1/2 percent of the retirement benefits which would be paid to their late husbands if they were still alive. H.R. 1 would correct this situation by increasing widows' benefits to 100 percent of the benefits payable to their late husbands. It would similarly expand the eligibility of a widower for benefits payable to his late wife. Altogether, this provision would mean that about 3.4 million widows and widowers would receive increased benefits totaling almost three quarters of a billion dollars in the first full year.
4. Increased Benefits for Delayed Retirement. Under present law, those who choose not to retire at age 65 forfeit their social security benefits for the period between the time they are 65 and the time they finally retire. H.R. 1 would allow retirees to make up a portion of these lost benefits through higher payments after retirement. Benefits would increase by one percent for each year that a person had worked between the ages of 65 and 72.
5. Liberalized Earnings Tests. Like the increased benefit for delayed retirement, the liberalized earnings tests contained in H.R. 1 would encourage more of our older citizens to remain active in the economic life of our country. This is a step which I promised to take in the 1968 campaign and for which I have been working ever since.

It is high time this step was taken. Those who can work and want to work should not be discouraged from working -- as they often are under the present law. By reducing the barriers to work, we can increase the sense of participation among older citizens and at the same time tap their energies and experience more effectively.

Under H.R. 1, the amount that a beneficiary could earn without losing any social security would be increased from \$1,680 a year to \$2,000 a year. That ceiling, in turn, would be automatically increased each time there was a cost of living benefit increase in social security. In addition, for those who earn in excess of \$2,000, the potential

reduction in social security payments would also be lessened. Under the present law, benefits are reduced by \$1 for each \$2 of extra earnings, but this rate applies only to the first \$1,200 earned above the exempt amount. Additional earnings beyond that level now cause benefits to be reduced on a \$1 for \$1 basis. Under H.R. 1, benefits would be reduced on a \$1 for \$2 basis for all earnings above \$2,000 -- no matter how much more a person earned.

6. Adult Assistance Reform. One of the most important elements of H.R. 1 -- and one of the most under-publicized -- is its provision to place a national floor under the income of every older American. H.R. 1 would replace the present Old Age Assistance program with a single, federally-financed program which would provide a monthly income of \$150 for an individual and \$200 for a couple when fully effective.

This program would assist 4.5 million elderly persons instead of the 2.1 million currently reached. It would also eliminate the practice of placing liens on homes as a condition of eligibility. Eligibility for assistance would be determined on the basis of need without regard to the income or assets of relatives. Relative-responsibility rules would not be a part of this new program.

I believe this reform is particularly important since it channels massive resources -- some \$2.8 billion in additional annual benefits -- to those whose needs are greatest.

7. Special Minimum Benefits. H.R. 1 would also provide special minimum benefits for people who have worked for 15 years or more under social security. The guaranteed minimum benefit would range from \$75 a month for a person who had worked 15 years under social security to \$150 a month for a person with 30 years of such work experience. At maturity, this provision would increase overall benefit payments to \$600 million.

H.R. 1: The Need for Prompt Action

In addition to all of these benefits for older people, H.R. 1 would have enormous benefits for many younger Americans as well. Clearly the passage of this bill is a matter of the very highest priority. I have made that statement repeatedly since I first proposed this far-reaching program in 1969. As I make that statement again today, I do so with the conviction that further delay is absolutely inexcusable. To delay these reforms by even one more year would mean a loss for older Americans alone of more than \$5 billion.

It is my profound hope that the Senate will now carry forward the momentum which has been generated by the passage of H.R. 1 in the House of Representatives, thus seizing an historic opportunity -- and meeting an historic obligation.

Where the Money Comes From: Military, Veterans and Federal Employee Benefits

We are also making significant progress toward improving the retirement income of career military personnel, veterans and Federal employees.

1. To improve military benefits, I will soon submit legislation to the Congress for recomputing retirement pay on the basis of January 1, 1971 pay scales, thus liberalizing annuities for current retirees. I will also submit legislation to provide -- for the first time -- full annuities for retired reservists at an earlier age, and to revise benefit

payments so that retirees receive their full annuities when they are most needed, at the conventional age of full retirement. I hope these proposals will receive favorable consideration.

In addition, I support legislation to provide military retirees with a less expensive survivor annuity plan -- one which is similar to that now provided to retired civil servants.

2. Benefits for veterans are also improving. Our efforts to improve both the quality of care and the number of patients treated in Veterans Administration hospitals will have a major impact on older veterans, since more than one-fourth of all VA patients are over 65. The staff to patient ratio at VA hospitals will be increased to 1.5 to 1, an all-time high, if our budget proposals are accepted.

The fiscal year 1973 budget also provides for further increases in nursing home care with the result that the authorized number of VA-operated nursing beds will have doubled since 1969 and the number of community contract beds and State home beds built and operated with VA subsidies will have increased by one-third over the same period.

In addition, I have signed into law significant improvements in pensions for elderly veterans which relate benefits more closely to need and protect recipients from income loss because of increases in the cost of living. In January of 1971, pensions were increased by an average of 9.6 percent. One year later, they went up an additional 6.5 percent and a new formula was adopted relating benefits more closely to need for the first time.

3. Federal Employee Benefits are also up. Retirement benefits for Federal employees have been liberalized in several instances, and -- under a more generous formula for determining cost of living increases -- annuities have gone up nearly 16 percent in the last 2-1/2 years. In addition, the Government's contribution to Federal health benefit premiums of current and retired employees has been substantially increased.

Where the Money Comes From: Reforming the Private Pension System

Only 21 percent of couples now on our social security rolls and only 8 percent of non-married beneficiaries are also receiving private pensions. While this picture will improve somewhat as workers who are now younger reach retirement, nevertheless -- despite the best efforts of labor and management -- only half the work force is presently covered by private pension plans. As the White House Conference on Aging pointed out, the long-range answer to adequate income for the elderly does not lie in Government programs alone; it also requires expansion and reform of our private pension system.

Late last year, I submitted to the Congress a five-point program to achieve this goal. It includes the following items:

1. Tax deductions to encourage independent savings toward retirement. Individual contributions to group or individual pension plans should be made tax deductible up to the level of \$1500 per year or 20 percent of earned income, whichever is less. Individuals should also be able to defer taxation of investment earnings on these contributions.

2. More generous tax deductions for pension contributions by self-employed persons. The annual limit for deductible contributions to pension plans by the self-employed -- on their own behalf and for those who work for them -- should be raised from \$2,500 or 10 percent of earned income, whichever is less, to the lesser of \$7,500 or 15 percent of earned income.

3. Requiring the vesting of pensions. Persons who have worked for an employer for a significant period should be able to retain their pension rights even if they leave or lose their jobs before retirement. Unfortunately, many workers do not now have this assurance -- their pensions are not vested. To change this situation, I have proposed a new law under which all pensions would become vested as an employee's age and seniority increased. Under this law, the share of participants in private pension plans with vested pensions would rise from 31 percent to 47 percent and the overall number of employees with vested rights would increase by 3.6 million. Most importantly, among participants age 45 and older, the percentage with vested pensions would rise from 60 percent to 92 percent.

4. The Employee Benefits Protection Act. This legislation was first proposed to the Congress in March of 1970; it was strengthened and resubmitted in 1971. It would require that pension funds be administered under strict fiduciary standards and would provide certain Federal remedies when they are not. It would also require that plans provide full information to employees and beneficiaries concerning their rights and benefits.

5. A study of pension plan terminations. In my December message, I also directed the Departments of Labor and the Treasury to undertake a one-year study concerning the extent of benefit losses which result from the termination of private pension plans. This study will provide the information we need in order to make solid recommendations in this field, providing needed protection without reducing benefits because of increased costs.

Where the Money Goes: The Burden of Health Costs

Growing old often means both declining income and declining health. And declining health, in turn, means rising expenditures for health care. Per capita health expenditures in fiscal year 1971 were \$861 for persons 65 and older, but only \$250 for persons under 65. In short, older Americans often find that they must pay their highest medical bills at the very time in their lives when they are least able to afford them.

Medicare, of course, is now providing significant assistance in meeting this problem for most older Americans. In fiscal year 1971, this program accounted for 62 percent of their expenditures for hospital and physicians services and 42 percent of their total health payments. In addition, an estimated 40 percent of Medicaid expenditures go to support the health costs of the elderly, while other programs provide significant additional assistance.

But serious problems still remain. Accordingly, this Administration has been working in a number of ways to provide even more help for the elderly in the health-care field. One of our most important proposals is now pending before the Congress. I refer to the recommendation I made more than a year ago that the Congress combine part B of Medicare -- the supplementary medical insurance program, with part A -- the hospital insurance program, thus eliminating the special monthly premium which older persons

must pay to participate in part B -- a premium which will reach \$5.80 per month by July. I have reaffirmed my commitment to this important initiative on other occasions and today I affirm it once again. Elimination of the premium payment alone would augment the annual income of the elderly by approximately \$1.5 billion, the equivalent, on the average, of almost a 4 percent increase in social security for persons 65 and over. I hope the Congress will delay no longer in approving this important proposal.

Our concern with health costs for older Americans provides additional reasons for the prompt approval of H.R. 1. Under that bill:

-- Provision is made for extending Medicare to many of the disabled (about 60 percent of whom are age 55 and over) who are drawing social security benefits and who have had to give up work before reaching regular retirement age;

-- Medicare beneficiaries would have the opportunity to enroll in Health Maintenance Organizations -- organizations which I strongly endorsed in my special message on health policy because of my conviction that they help to prevent serious illness and also help to make the delivery of health care more efficient;

-- Provision is made for removing the uncertainties relative to coverage under Medicare when a person needs to use extended care facilities after hospitalization.

In my recent message to Congress on health policy, I indicated a number of other measures which will help reduce the cost of health care. I spoke, for example, of the special attention we have been giving under Phase II of our New Economic Policy to the problem of sky-rocketing health costs, through the special Health Services Industry Committee of the Cost of Living Council. I indicated that a number of cost control features would be introduced into the Medicare and Medicaid reimbursement processes -- with the overall effect of reducing health costs. I have also called for new research efforts in fields such as heart disease, cancer, and accident prevention -- initiatives which also promise to reduce health problems -- and health bills -- for older persons.

Where the Money Goes: Inflation

Inadequate retirement incomes are strained even further when inflation forces older persons to stretch them to meet rising costs. Because older persons are uniquely dependent on relatively fixed incomes, they are uniquely victimized by the ravages of inflation. While my proposals for making social security benefits inflation-proof will provide significant help in defending the elderly against this menace, it is also important that we take on this enemy directly -- that we curb inflationary pressures.

This goal has been a central one of this Administration. When I came to office this country was suffering from a massive wave of price inflation -- one which had resulted in large measure from the methods chosen to finance the Vietnam War. The problem of reversing this wave by conventional methods was a more stubborn problem, frankly, than I expected it to be when I took office. By the summer of 1971, it became clear that additional tools were needed if inflation was to be quickly and responsibly controlled. Accordingly, I announced last August a New Economic Policy -- one which has received the strong support of the Congress and the American people.

I have been especially gratified that older Americans -- whose stake in the battle against inflation is so high -- have rallied to support this new economic program. With their continued support -- and that of all the American people -- we can carry this battle forward and win a decisive victory.

One key element in that battle, of course, is to be sure that Government spending programs, including those which help the elderly, are responsibly financed. If they are not, then inflation will merely be reignited and Government policy will merely be robbing older Americans with one hand of the aid it gives them with the other.

Where the Money Goes: Property Taxes

Two-thirds of all older citizens -- and 78 percent of older married couples -- own their own homes. For these Americans -- and for many younger Americans as well -- the heavy and growing burden of property taxes constitutes one of the most serious of all income-related problems. Even those who rent their homes often bear an unfair burden since property tax increases are frequently passed along in the form of higher rents. The reason these burdens are so onerous, of course, is that the income from which property taxes must be paid by the elderly is usually going down at the very time the taxes are going up.

Property taxes in the United States have more than doubled in the last ten years. The problems which this fact implies are felt by Americans of all ages. But elderly Americans have a special stake in their solution.

I am committed to doing all I can to relieve the crushing burden of property taxes. I have been proceeding toward this end in two ways. First, I am continuing to push for passage of our General and Special Revenue-Sharing proposals, legislation which would channel some \$17 billion into State and local budgets and thus provide a significant opportunity for property tax relief. At the same time, as I indicated in my recent State of the Union Address, I am also moving to change the system through which we finance public education. In developing a new approach, I will draw on the recommendations of the President's Commission on School Finance, the Advisory Commission on Inter-governmental Relations, and other analyses such as those which are being performed under the direction of the Secretaries of the Treasury, and of Health, Education, and Welfare. The purpose of this intensive investigation is to develop ways of putting this Nation's educational system on a sounder financial footing while helping to relieve the enormous burden of school property taxes.

Reducing Income Tax Burdens

Recently approved and pending changes in the income tax laws also provide special help to older persons. Under these provisions, a single person age 65 or over would be able to receive up to \$5,100 of income without paying any Federal income taxes, while a married couple with both husband and wife 65 or over would be able to receive up to \$8,000 of such tax-free income.

Where the Money Goes: Protecting Elderly Consumers

The quality of life for older Americans depends to a large extent upon the responsiveness of the marketplace to their special needs. It is estimated that elderly persons now spend over \$60 billion for goods and services every year -- and they will be able to spend billions more if my proposals for increasing their income are enacted. Our economy should be responsive to the needs of older Americans; they have a high stake in advancing consumer protection.

Through organizational changes, administrative actions and legislative recommendations, this Administration has been working to provide needed protection for the American consumer in general -- and for the older consumer in particular. The several pieces of consumer legislation which I have submitted to the Congress are designed to reduce dangers which are especially acute for older consumers -- and I again urge their enactment.

In addition, I am asking my Special Assistant for Consumer Affairs, in cooperation with the Secretary of Housing and Urban Development, to develop a program for helping to enforce the Interstate Land Sales Full Disclosure Act by fostering greater awareness among older citizens of their legal rights under this legislation.

Recognizing that the complexity of today's marketplace demands great sophistication by the individual consumer, our primary and secondary schools have stepped up their programs for consumer education. Unfortunately, many older Americans have never had the opportunity to benefit from such programs. The Office of Consumer Affairs is therefore developing guidelines for adult consumer education programs with particular emphasis on the needs of the elderly. To carry out these guidelines, I am asking my Special Assistant for Consumer Affairs, working in cooperation with the Secretary of Health, Education, and Welfare, to develop a program of technical assistance to help the States create consumer education programs specifically designed for older citizens.

A Comprehensive Effort for Improving Income

The key characteristic of my strategy for protecting the income position of older Americans is its comprehensiveness. For it would help to augment and protect the income older persons derive from social security, adult assistance, Federal military, veterans and civilian benefits, and private pensions, while at the same time curbing the cruel drain on those incomes from rising health costs, inflation, taxes and unwise consumer spending. I hope now that the Congress will respond promptly and favorably to these proposals. If it does, then the purchasing power of the elderly can be enhanced by billions of dollars a year -- an achievement which could do more than anything else to transform the quality of life for Americans over 65.

UPGRADING THE QUALITY OF NURSING HOME CARE

Income related measures can help more older Americans to help themselves; they build on the strong desire for independence and self-reliance which characterizes the older generation. We must recognize, however, that some older Americans -- approximately five percent by recent estimates -- cannot be primarily self-reliant. These older men and women require the assistance provided by skilled nursing homes and other long-term care facilities. For them, a dignified existence depends upon the care and concern which are afforded them in such settings.

In June of 1971, at a regional convention of the National Retired Teachers Association and the American Association of Retired Persons, I pledged to meet the challenge of upgrading nursing home care in America. I expressed my determination that nursing homes, for those who need them, should be shining symbols of comfort and concern. I noted that many such facilities provide high quality care, but that many others fall woefully short of this standard. I observed

that those who must live in such facilities are virtual prisoners in an atmosphere of neglect and degradation.

Following that speech, I directed the development of an action plan to improve nursing home care and I announced that 8-point plan in August of 1971. I am pleased to be able to report that we have made significant progress in carrying out that plan. We have delivered on all of the eight promises implied in that program. Let us look at each of them:

1. Training State Nursing Home Inspectors - Through February of 1972, almost 450 surveyors had been trained in federally-sponsored programs at three universities. Contract negotiations are underway to continue ongoing programs and to establish new ones at two university training centers.

2. Complete Federal Support of State Inspections Under Medicaid - Legislation to raise the level of financial participation by the Federal Government in this activity to 100 percent was submitted to the Congress on October 7, 1971, as an amendment to H.R. 1. This proposal is awaiting Congressional action.

3. Consolidation of Enforcement Activities - A new Office of Nursing Home Affairs has been established in the Office of the Secretary of Health, Education, and Welfare. This unit is directly responsible for coordinating all efforts to meet our July 1, 1972, deadline for inspections of skilled nursing homes and for certification of these facilities in accordance with proper procedures.

4. Strengthening Federal Enforcement - 142 new positions have been allocated to the Medical Services Administration to enforce Medicaid standards and regulations. Added emphasis is being placed on the audit process as a tool for enforcement; 34 additional positions are being added in HEW's Audit Agency to perform audits of nursing home operations.

5. Short-term Training for Professional and Para-professional Nursing Home Personnel - This program is currently funded at the \$2.4 million level and is scheduled to train 20,000 persons. The fiscal year 1973 budget which I submitted to the Congress contains \$3 million to train an additional 21,000 persons.

6. Assistance for State Investigative Units - A program to develop and test investigative-ombudsman units to respond to individual complaints and to other problems in the nursing home area has also been initiated. As an interim mechanism, nearly 900 social security district and branch offices have been designated as listening posts to receive and investigate complaints and suggestions about nursing home conditions.

7. Comprehensive Review of Long-term Care - The Office of Nursing Home Affairs is now carrying out a comprehensive analysis of issues related to long-term care.

8. Cracking Down on Substandard Nursing Homes - Progress is also being made on this important front. Last December I signed legislation which, among other things, authorizes Federal quality standards for intermediate care facilities, thus giving us additional authority to guarantee a decent environment for those who live in long-term care facilities.

Every State providing nursing home care under the Medicare and Medicaid programs has now installed systems for surveying and certifying nursing homes. In the area of fire-safety and other safety guidelines, a coordinated set of standards for homes providing care under these programs is being put into effect.

Medicaid compliance activities have also been stepped up. Onsite Federal reviews of State Medicaid certification procedures have been carried out. Deficiencies in those procedures were found in 39 States. These deficiencies were publicly announced by the Secretary of Health, Education, and Welfare on November 30, 1971, along with a timetable for correcting them. Since that time, 38 of the 39 States have made the necessary corrections. We have determined that every facility receiving Medicaid funds must have been inspected and correctly certified by July 1, 1972.

While we prefer to upgrade substandard homes rather than shut them down, we will not hesitate to cut off money when that is necessary. As of February 11, 1972, in fact, 13 extended care facilities had been decertified for participation in Medicare. In such cases, as I have often pledged before, we are firmly committed to seeing that adequate alternative arrangements are made for those who are displaced.

In fiscal year 1971, the Federal Government contributed \$1.2 billion to the cost of nursing home care. We should also remember, however, that more than 40 percent of the annual expenditure for nursing homes is borne by private sources. In addition to seeing that Federal tax dollars are properly spent in this area, it is also important that private individuals are protected when they purchase nursing home services. I have asked the Secretary of Health, Education, and Welfare to develop proposals to deal with this dimension of the nursing home challenge.

SPECIAL SERVICES TO FOSTER INDEPENDENCE

Improving the income position of older Americans and upgrading nursing homes -- these are two concerns which have been of highest priority for this Administration in the past and which will continue to be central in the future. As we work to develop a truly comprehensive strategy, however, other agenda items have also been emerging as areas of special emphasis, particularly those involving public and private services which can help older persons live dignified, independent lives in their own homes for as long as possible.

Increased Resources for the Administration on Aging

Since the passage of the Older Americans Act in 1965, the Administration on Aging has had the lead Federal role in developing and coordinating such services. While that office has accomplished many significant things, the importance and urgency of its mission have outstripped its financial resources.

It was to help remedy this situation that I announced at the White House Conference on Aging last December that I would call for a five-fold increase in the budget of the Administration on Aging -- from \$21 million to \$100 million. As I will discuss below in greater detail, I am now requesting an additional \$100 million for nutritional and related purposes, money which would also be spent through the Administration on Aging.

With this substantial increase in funds, we would be able to step up significantly our efforts to develop and coordinate a wide range of social and nutritional services for older Americans. Our central aim in all of these activities will be to prevent unnecessary institutionalization -- and to lessen the isolation of the elderly wherever possible.

Extending the Older Americans Act

Since its passage in 1965, the Older Americans Act has served as an important charter for Federal service programs for the elderly. Unless the act is promptly extended, however, the grant programs it authorizes will expire on June 30th. This must not happen. I therefore urge that this landmark legislation be extended -- and that the extension be indefinite, rather than limited to a specific period of time.

Strengthening the Planning and Delivery of Services

In addition, I am asking that the Older Americans Act be amended to strengthen our planning and delivery systems for services to the elderly. Too often in the past, these "systems" have really been "non-systems," badly fragmented, poorly planned and insufficiently coordinated. My proposed amendments are designed to remedy these deficiencies.

We should begin by helping to develop and strengthen the planning capacities of the State agencies on aging and of new area agencies on aging which would be established within each State. Up to 75 percent of the administrative costs of these new area planning agencies would be funded by the Administration on Aging, which would also establish general goals to which activities at the State and local levels would be directed. One of the major priorities would be to enhance and maintain the independence of older citizens.

The State and area planning agencies would plan for the mobilization and coordination of a wide range of resources -- public and private -- to meet such goals. The Administration on Aging would be authorized to fund up to 90 percent of the cost of social and nutritional services provided under plans developed by the area planning agencies. In fiscal year 1973, \$160 million would be allocated in formula grants for nutritional and social services. An additional \$40 million would be allocated in special project assistance to develop new and innovative approaches and to strengthen particularly promising area plans.

By establishing overall objectives and by providing both money and mechanisms for a stronger planning and coordination effort, we can ensure that resources and energies which are now widely scattered and fragmented can be pulled together in ways which will notably increase their impact.

Coordinating Federal Efforts

Even as we strengthen coordination at grassroots levels, so we must do a better job of coordinating Federal programs. As this message makes clear, efforts are being made all across our Government to help older citizens. But if there was one clear message at the White House Conference on Aging, it was that this wide range of Federal resources must be better coordinated. To help achieve this important objective, I have directed my Special Consultant on Aging to work with all these agencies in an intense new effort to develop coordinated services.

As the first step in this effort, I have directed those agencies whose programs have a major impact on the lives of older persons to provide the Cabinet-level Committee on Aging, within sixty days, with the amounts they identify as serving the needs of the elderly. In addition, I am directing that each agency identify, within the total amount it expects to spend for its aging programs, a sum that will be available to the States and localities for purposes related to the Older Americans Act. The Administration on Aging will then provide

this information to the States so that it can be utilized in the State and local planning process. State aging agencies will also be able to transmit their views on proposed Federal programs, thereby furthering the interchange of information and strengthening overall coordination.

Under these procedures, we can ensure that all resources for helping the elderly are fully marshalled and coordinated, in a way which is responsive to the special needs of every State and locality in our land.

Establishing Information and Complaint Centers

We must also work to improve communications between the Federal Government and older Americans and to alert the Government to areas of special need. Because older persons often have some difficulty moving about conveniently, and because services are often fragmented and channeled through complex bureaucratic mechanisms, it is especially important that the elderly have one place to turn where they can obtain needed information and let their views be heard.

As I have already noted, we have been moving in this direction under my program to upgrade the quality of nursing home care. Following the directive which I announced at the White House Conference on Aging, Social Security offices have also been expanding their information and referral services for the elderly. District and branch offices are now handling more than 200,000 such inquiries each month -- and that number is expected to increase. A task force is now at work within the Social Security Administration to examine ways of improving this service.

As another step in this direction, I have directed the Cabinet-level Committee on Aging to examine ways in which we can use other Government offices -- such as the General Services Administration's Federal Information Centers and the Agricultural Extension Service's local offices -- in further expanding and improving our information and complaint services.

Fighting Hunger and Malnutrition

In addition to our overall funding and coordination proposals concerning Federal services, we are also moving ahead in a variety of specific service areas. One of the most important is the fight against hunger and malnutrition among the elderly.

The thought that any older citizens -- after a lifetime of service to their communities and country -- may suffer from hunger or malnutrition is intolerable. Happily, since I submitted my message on hunger and nutrition to the Congress in May of 1969, we have made significant strides toward eliminating this problem among all age groups in America. Our efforts to increase incomes have been central to this endeavor, of course. But our special food assistance programs have also been substantially augmented.

If my budget proposals for fiscal year 1973 are accepted, overall spending for food stamps will have increased nine-fold since 1969. In the coming fiscal year, an estimated 2 million elderly participants in the Food Stamp Program will receive benefits of \$343.5 million, compared with only \$45.8 million in fiscal year 1969. Virtually every county in the Nation now offers either the Food Stamp or the Food Distribution Program; in early 1969, nearly 500 counties offered neither. In all, 2.5 million older Americans benefit from at least one of these programs.

Food assistance is important to the elderly. They benefit not only from nutritious food but also from the activity of preparing meals and sharing mealtimes with others. To maximize these benefits, the Department of Agriculture in January revised its regulations to improve the nutrition program and expand participation.

But more needs to be done. Many older persons who are entitled to food stamps or to surplus commodities are still not receiving them. Why is this the case? In many instances, older Americans do not realize they are eligible for participation. The agencies which provide assistance are often unaware of older persons who need their services. Some older persons choose not to participate -- out of pride or out of fear that accepting food assistance may subject them to the arbitrary treatment they associate with the present welfare system. In some cases, older persons want to participate but find that necessary transportation is unavailable.

To overcome the barriers which keep older Americans from full participation in food assistance programs, we are launching this year a major outreach campaign called Project FIND. This campaign will be conducted through a senior citizen awareness network made up of federally operated or funded field offices and outreach workers. It is my hope that Federally-supported personnel will be augmented in this effort by volunteers from State local government offices and from the private sector. For ninety days, all these workers will go out across our country to find those who should be participating in nutrition programs but who are not yet involved.

Last night, I signed into law S. 1163, a new national nutrition program for the elderly. This program will provide prepared meals in a group setting and delivered meals for those who are confined to their homes. I welcome this effort. Because of my strong feeling that this area should be one of priority action, I will submit to the Congress -- as I suggested above -- an amendment to my 1973 budget to provide an additional \$100 million for nutritional and related services. My proposed amendments to the Older Americans Act would further strengthen this effort by ensuring that the Food Stamp Program is planned as part of a more comprehensive service effort.

Other steps will also be taken in this area. In some areas, for example, space at federally-assisted housing projects will be utilized for feeding older persons. The support of State and local governments, of civic and religious organizations and of the food services industry will also be solicited. Maximum use will be made of existing technical resources, including skilled personnel who have worked with the school lunch program and other special programs of the Department of Agriculture. The time has come for marshalling all of our resources in a comprehensive campaign to meet the nutrition needs of older Americans.

Providing Better Transportation for the Elderly

For many older Americans, lack of mobility means poor access to friends and relatives, to government services and to meaningful participation in the community. Unless we meet the challenge of providing better transportation for older persons, our efforts in other fields will not be as effective as they should be. This is why I told the delegates to the White House Conference on Aging that I would, by administrative action, require that Federal grants which provide services for older persons also ensure that the transportation needed to take advantage of these services is available.

In addition, the Department of Transportation is significantly increasing its program for developing new ways to meet the public transportation needs of older persons. The approaches which are being tested include special new transportation services to take elderly citizens from housing projects and other residential areas to hospitals, senior citizen centers, social service agencies, employment opportunities and the like; and demand-responsive services whereby the elderly are picked up at their doorsteps and taken to specific desired destinations.

Once new ways have been developed for meeting the transportation needs of the elderly, we must also make them generally available. One proposal which could help significantly in this effort is the recommendation recently submitted to the Congress by the Secretary of Transportation under which some of the funds now in the Highway Trust Fund could be used by States and localities to augment resources in the mass transportation area.

I hope the Congress will give prompt approval to this important plan. The flexibility it provides would allow State and local officials -- who know best the transportation needs of the elderly within their own jurisdictions -- to give special consideration to meeting those needs. I am asking the Secretary of Transportation to develop specific suggestions for assisting the States and localities in these undertakings.

In addition, the Department of Transportation is ready to give priority attention to community requests for helping older Americans through capital grants from the Urban Mass Transportation Fund and is willing to commit significant resources to this end. I urge the States and localities to move immediately to take advantage of these resources.

Meeting the Housing Needs of Older Citizens

This Administration has also worked hard to respond to the very special housing needs of older Americans. It is expected, for example, that an all-time record in producing subsidized and insured housing and nursing homes for the elderly will be achieved this year by the Department of Housing and Urban Development. In the current fiscal year, nearly 66,000 units of subsidized housing for the elderly will be funded under HUD's housing assistance programs -- a figure which should rise to over 82,000 in fiscal year 1973. In addition, accommodations for over 14,000 people, mostly elderly, will be provided this fiscal year under HUD's nursing and intermediate care facility programs -- and nearly 18,000 such accommodations will be provided next year. Finally, a large number of elderly citizens will benefit from other housing funded by this year's record number of nearly 600,000 subsidized housing unit reservations. Clearly, we are making substantial progress in this important area.

A number of other administrative steps have also been taken to ensure that this new housing is responsive to the special needs of the elderly. For example, Secretary Romney recently announced new guidelines for the Section 236 subsidized rental program for lower income elderly tenants. These guidelines will help ensure greater variety in building types, including highrise structures, and more flexibility in their locations. As a result of these guidelines, older persons will find such housing arrangements even better suited to their particular needs.

The Department of Housing and Urban Development has also issued initial guidelines for the new Section 106 (a) program which will provide technical assistance to non-profit

sponsors of low and moderate income housing -- including housing which is specially designed for the elderly.

In addition, the Department will extend the mortgage maturity for its Federal Housing Administration insured nursing home program up to a maximum of 40 years. This decision will not only reduce monthly occupancy charges to patients, but it will also enable sponsors of residential housing to "package" residential and nursing home complexes more easily. The proximity of these facilities will permit elderly persons temporarily to vacate their residential units for short term nursing care -- and at the same time remain close to family, friends, and the environment to which they are accustomed.

I have also directed the Secretary of Housing and Urban Development to work with the Administration on Aging in developing training programs dealing with the management of housing for the elderly.

The Law Enforcement Assistance Administration has undertaken an intensive research effort to determine factors which encourage or inhibit crime in residential settings and to develop total security systems to reduce crime in housing projects. The Department of Housing and Urban Development plans to use the results of this effort in its housing programs. I have also made grant funds available through the Law Enforcement Assistance Administration for reducing crime in areas housing older persons. Already, in two cities, funds have been granted specifically for this purpose.

Crime is an especially serious problem for our older citizens. Through these and other measures, we will continue our strong effort to meet this challenge.

Two years ago my task force on aging observed that "older persons would make greater use of many of the services society intends them to receive if these services were made more accessible to them. One reason that the number of senior centers has increased so fast is because centers facilitate the packaging, marketing, and delivery of services." The task force also noted that, "although the number of senior centers has rapidly grown in recent years, centers are still too limited in number to reach more than a fraction of the older population." In my judgement, a natural location for a senior center is a housing facility occupied primarily by older persons.

The Department of Housing and Urban Development administers two housing programs under which such facilities can be made available to older persons living in the project and in the surrounding neighborhood: the Section 236 Program and the Public Housing Program. Both of these programs provide specially designed housing for lower income older persons. The law under which these programs are administered contains language which allows the financing of facilities designed primarily for use by older persons including "cafeteria or dining halls, community rooms, workshops, infirmaries, ... and other essential service facilities."

To increase the supply of well located senior centers, I have instructed the Department of Housing and Urban Development to encourage greater provision of community space for senior centers within subsidized housing projects for the elderly. The Department will consider the community's overall need for these centers in determining the appropriate scale of centers within such housing projects.

On other fronts, the Farmers Home Administration in the Department of Agriculture is taking steps to meet the housing needs of elderly persons who live in rural areas. Under the Section 502 program, for example, thousands of elderly families have received millions of dollars in loans for home ownership and repair. The Section 515 program, which provides favorable interest loans with repayment periods of up to 50 years to stimulate the development of rental housing in rural areas, has also moved forward. Rental units financed under this program have tripled from 1969 to 1973.

EXPANDING OPPORTUNITIES FOR INVOLVEMENT

It is important that we give sufficient attention to the things our Nation should be doing for older Americans. But it is just as important that we remember how much older Americans can do for their Nation. For above all else, what our older citizens want from their country is a chance to be a part of it, a chance to be involved, a chance to contribute.

I am determined that they will have that chance. For as I told the White House Conference, "we cannot be at our best if we keep our most experienced players on the bench." This Administration is deeply committed to involving older citizens as actively as possible in the life of our Nation -- by enhancing their opportunities both for voluntary service and for regular employment.

Improving Voluntary Service Programs

Voluntary social action has long been recognized as one of the great distinguishing characteristics of America, a force which has helped to unite and focus our diverse people in the pursuit of common goals. And even as the voluntary spirit has helped our country move forward more effectively, it has also provided those who have volunteered for service with a greater sense of fulfillment.

The voluntary spirit is particularly relevant to the lives of older Americans. The White House Conference on Aging, for example, called attention to "ways in which older Americans could fulfill themselves by giving service to one another and to their communities." Delegates to the Conference called for "a national policy...to encourage older adults to volunteer," and urged "that existing national older adult voluntary programs should be expanded and funded at adequate levels in order to serve extensive numbers of volunteers." They urged a mobilization of public and private organizations to strengthen the volunteer movement.

I agree completely with these judgments. That is why, at the time of the White House Conference, I pledged to move successful voluntary programs from demonstration status to full operation on the national level, an expansion effort that is rapidly moving forward.

I requested, for example, that the Foster Grandparent program be doubled to \$25 million, providing for 11,500 foster grandparents to serve 23,000 children each day -- 50,000 children in all each year -- in some 450 child care institutions throughout the country. I also asked that ACTION's Retired Senior Volunteer Program (RSVP) be tripled to \$15 million so that as many as 75,000 senior volunteers could be involved in community services.

When the RSVP program has developed to the full extent permitted by the new appropriations, as many as 11,000 volunteers will be serving older persons in nursing homes and other extended care facilities, bringing companionship and personal assistance to some 45,000 residents who might otherwise be lonely and isolated. At the same time, as many as 13,000 part-time RSVP volunteers will be serving as homemaker and health aids, enabling thousands of older persons to continue to live in their own homes. By using senior volunteers in a variety of programs, we can foster that human contact which brightens the lives both of those who are served and those who volunteer.

But other new steps are also needed in this area.

As one such step, the Congress should enact legislation which would enable the ACTION agency to expand person-to-person volunteer service programs for older Americans. These efforts would build on the successful experience of the Foster Grandparent program. One important characteristic of such programs is that so much good can be accomplished, so many people helped, for a relatively small dollar investment. It would indeed be tragic if we did not capitalize on this opportunity.

Measures are also needed to improve coordination among the many Federal and non-Federal volunteer activities which affect the aging. As one important step in this direction, the Administration on Aging and the National Center for Voluntary Action have enlisted the cooperation of 130 national voluntary organizations in a program to help older men and women in 300 communities live dignified lives in the familiar settings of their own homes. Too often, older Americans are displaced from such settings simply because small problems such as simple home repairs, shopping and trips to obtain health care have become too difficult. And yet, with only minimal assistance from volunteers, these problems could easily be met.

I have directed the ACTION agency to work in every possible way to help provide such assistance. Already, the RSVP program is moving forward in this area. I am confident that other ACTION program volunteers can also make a major impact in this field. It is my hope, too, that communities will consider the elderly residents of federally assisted housing projects as a source of volunteer manpower for serving other older persons.

As we move ahead with this entire program, we should take encouragement from successes of the past. One which is particularly noteworthy is the program in Mount Vernon and Edmonds, Washington, where local citizens have designed a unique bridge across the generation gap called STEP -- Service To Elderly Persons. Under this program, volunteers from the local high schools have undertaken, on a regular basis, to assist elderly persons in performing small tasks, while at the same time providing them with companionship and renewed hope. Everyone gains from a program of this sort. If leaders at every level are alert to such possibilities, our progress can be enormous.

Often in quiet ways, the people of the United States have been responding to the challenges of our society with compassion and resourcefulness. Now it is for those of us who have the responsibility for national leadership to provide the Federal assistance which can help such voluntary efforts go even further and accomplish even more.

Employment Opportunities for Older Citizens

Discrimination based on age -- what some people call "age-ism" -- can be as great an evil in our society as discrimination based on race or religion or any other characteristic which ignores a person's unique status as an individual and treats him or her as a member of some arbitrarily-defined group. Especially in the employment field, discrimination based on age is cruel and self-defeating; it destroys the spirit of those who want to work and it denies the Nation the contribution they could make if they were working.

We are responding to this problem in a number of ways. The Department of Labor, for example, has filed over 80 suits under the Age Discrimination in Employment Act of 1967 -- 30 of which have been successfully concluded. I will soon propose to the Congress that this act be broadened to include what is perhaps the fastest growing area of employment in our economy -- the State and local governments. I will also send a directive to the heads of all Federal departments and agencies reaffirming and emphasizing our policy that age shall be no bar to a Federal job which an individual is otherwise qualified to perform.

The Age Discrimination in Employment Act relates to persons between the ages of 45 and 65. I recognize that persons falling within this age group are confronted with special problems in the employment area and that we should do everything we can to resolve these problems. It is also important, however, that we help open employment opportunities for persons over 65. To this end, I have requested the Secretary of Labor to urge the States and local communities to include older persons in the opportunities provided by the Emergency Employment Act of 1971, and to work with our public employment offices so that they will be in a position to help open job opportunities for the over 65 group, including opportunities for part-time employment in both the public and private sectors.

I also asked last fall that funds be doubled for special Operation Mainstream projects for low-income older workers -- such as Green Thumb and Senior Aides. This measure can mean that as many as 10,000 older persons will be employed in activities that provide useful community service.

ORGANIZING FOR FUTURE ACTION

One of the important concerns of the White House Conference on Aging was the way in which the Government is organized to deal with the problems of older Americans. It was because I share this concern that I established my original task force on aging, appointed the first Special Assistant to the President on Aging and the first Special Consultant to the President on Aging, set up a new Cabinet-level Committee on Aging and called the White House Conference.

In a similar manner, the Secretary of Health, Education, and Welfare has taken steps to ensure that the voice of older Americans speaks loud and clear within that Department. He has informed me that he will strengthen the Department's Advisory Committee on Older Americans and provide it with staff capability to support its increased responsibilities. The Commissioner of Aging, in his capacity as Chairman of the Advisory Committee, will report directly to the Secretary.

Another important organizational concern involves Government research activities which concern the process and problems of aging. It is important that the same scientific resources which have helped more people live longer lives now be applied to the challenge of making those lives full and rewarding for more Americans. Only through a wise investment in research now, can we be sure that our medical triumphs of the past will not lead to social tragedies in the future.

What we need is a comprehensive, coordinated research program, one which includes disciplines ranging from biomedical research to transportation systems analysis, from psychology and sociology to management science and economics. To coordinate the development of such a program, a new Technical Advisory Committee for Aging Research will be created in the office of the Secretary of Health, Education, and Welfare.

A GENERATION NO LONGER FORGOTTEN

We all grow old; the younger generation today will be the older generation tomorrow. As we address the needs of older Americans, therefore, we are truly acting in the best interest of all Americans. The actions and proposals which have been outlined in this message are designed to address those needs and meet those interests.

When I spoke about the problems of the elderly back in 1968, I described our older citizens as "an entire generation of forgotten Americans." But since that time, as this message clearly demonstrates, that situation has sharply changed. Today, it can truly be said that at all levels of Government and in all parts of the country, "the aging have come of age." Much work still remains, to be sure, but we can conclude with assurance that the aging are forgotten no longer.

Just before the First World War, one of the brilliant young writers of that day penned a line which has since become a hallmark of the period: "It is the glory of the present age," he wrote, "that in it one can be young."

Since that time, the generation of which he wrote has come through a troubled and challenging time -- through two World Wars and a Great Depression, through the difficult experiences of Korea and Vietnam. The members of that same generation have led this country through a time of social and economic change unparalleled in world history. And they have come through all of these challenges "with colors flying." Because of their success, we now have the opportunity to complete their quest for peace and justice at home and around the world.

At such a moment, one obligation should be very high on our list of priorities: our obligation to this older generation. Let us work to make ours a time of which it can be said, "the glory of the present age is that in it men and women can grow old" -- and can do so with grace and pride and dignity, honored and useful citizens of the land they did so much to build.

RICHARD NIXON

THE WHITE HOUSE,

March 23, 1972.

#####

TOPICAL INDEX TO
CONFERENCE RECOMMENDATIONS

ABOUT THE INDEX

This index has been developed to provide the reader with a fuller understanding of the extent and variety of recommendations resulting from the White House Conference on Aging. This index categorically groups the recommendations of the Conference around the major topical issues which are of interest and concern to older Americans.

The index lists the recommendations of the Sections and Special Concerns Sessions which address the major topical issues as reflected in the Table of Contents. The index also cross refers the reader to the appropriate page in Volume II of the Conference final report, entitled TOWARD A NATIONAL POLICY ON AGING, VOLUME II: CONFERENCE FINDINGS AND RECOMMENDATIONS FROM THE SECTIONS AND SPECIAL CONCERNS SESSIONS, where the full text of each Section and Special Concerns Session recommendation can be found.

TOPICAL INDEX

I. ASSURING ADEQUATE INCOME

<u>A. Setting Income Goals</u>	<u>Conference Section</u>	<u>Conference Recommendation No.</u>	<u>Page in Vol. II</u>
	Facilities	13	73
	Income	1	38
	Nutrition	5	45

Special Concerns Sessions

Aging & Aged Blacks	8	182
	9	182
	38	184
	42	185
	50	186
	54	186
	66	187
Aging & Blindness	1	127
Asian American Elderly	14	162
Elderly Poor	I-1	154
	I-2	154
	I-4	154
Older Family	11	207
Rural Elderly	6	149
Spanish Speaking	I-4	167
	V-2	169
Youth and Age	I-2	245

B. Providing Adequate
Basic Income1. Public Programs

<u>Section</u>		
Employment	8	14
Facilities	25	75
Income	2	38
	7	38

Special Concerns Sessions

Aging & Aged Blacks	40	
Aging & Blindness	1	
Elderly Poor	I-3	154
	I-5	154
	I-7	154
	II-B-3-Other Concerns	155
Spanish-Speaking Elderly	I-5	167
	III-5	168

2. Private Pensions

<u>Section</u>		
Employment	5	13
	10	14
	14	15
Income	8	39

Special Concerns Sessions

Aging & Aged Blacks	11	182
Elderly Indians	I-4	199
Elderly Poor	I-6	154

	<u>Conference Section</u>	<u>Conference Recommendation No.</u>	<u>Page in Vol. II</u>
3. <u>Employment Income</u>			
			See below "Opportunities for Involvement"
	<u>Special Concerns Sessions</u>		
			See below "Opportunities for Involvement"
C. <u>Reducing Income Drains</u>	<u>Section</u>		
1. <u>Property Taxes</u>	Income	9	39
	Housing	6	32
	<u>Special Concerns Sessions</u>		
	Elderly Consumer	III-D	230
	Elderly Poor	II-B-1	155
	Rural Elderly	8	149
	Spanish Speaking Elderly	V-1	169
2. <u>Health Care Payments</u>	<u>Section</u>		
	Facilities	26	76
		28	76
	Health	3	23
	Income	10	39
	Nutrition	2	44
	<u>Special Concerns Sessions</u>		
	Aging & Aged Blacks	14	182
		15	183
		16	183
		24	183
		30	184
	Asian American Elderly	13	162
	Aging & Blindness	12	128
	Aging & Deafness	IV-A	137
	Elderly Consumer	III-2	
	Homemaker	1	117
	Long Term Care	1	107
		2	107
		3	107
		7	108
		8	108
		10	108
		12	108
		13	108
		17	108
		19	108
	Mental Health	4	112
		5	112
		6	112
	Poor Elderly	II-A1	155
		II-A2	155
		II-A3	155
	Rehabilitation	1	131
		6	133
	Rural Elderly	11	149

	<u>Conference Special Concerns Sessions</u>	<u>Conference Recommendation No.</u>	<u>Page in Vol. II</u>
D. <u>Increasing Income for Special Groups</u>			
	<u>Section</u>		
	Facilities	21	75
		26	76
	Income	1	38
		4	38
		5	38
		6	38
	<u>Special Concerns Sessions</u>		
	Aging & Aged Blacks	39	185
		40	185
	Aging & Blindness	5	128
	Asian American Elderly	14	162
	Elderly Indian	I-1	199
		I-8	200
	Spanish Speaking Elderly	V-9	169
 II. ASSURING APPROPRIATE LIVING ARRANGEMENTS			
A. <u>Developing Elderly Housing</u>			
	<u>Section</u>		
	Housing	1	32
		3	32
		7	33
		8	33
		10	33
		14	33
		23	34
	Aging & Aged Blacks	35	184
		36	184
	Asian American Elderly	6	162
		7	162
	Poor Elderly	II-B6	155
	Indian Elderly	II-4	200
	Rural Elderly	10	149
	Spanish Speaking Elderly	III-1	168

	Conference Special Concerns Sessions	Conference Recommendation No.	Page in Vol. II
B. <u>Choices in Elderly Housing</u>			
	<u>Section</u>		
	Facilities	1	72
		22	76
		28	76
	Housing	4	32
		5	32
		15	33
		16	33
		18	34
	<u>Special Concerns Sessions</u>		
	Aging & Blindness	5	128
	Asian American Elderly	10	162
		11	162
	Homemaker	1	117
		2	117
		3	118
		4	118
		5	118
	Older Family	8	207
	Poor Elderly	II-B2	155
		II-B4	155
		II-C2	155
	Religious Community	6	220
	Rural Elderly	9	149
	Spanish Speaking Elderly	II-2	168
		III-6	168
	Youth and Age	III-2b	246
C. <u>Housing Design and Standards</u>			
	<u>Section</u>		
	Housing	9	33
		24	34
		25	34
	<u>Special Concerns Sessions</u>		
	Aging & Aged Blacks	71	187
	Legal Aid	1	235
	Older Family	9	207
	Spanish Speaking Elderly	III-3	168
	Youth & Age	I-6	245
D. <u>Relocation and Preservation of Neighborhoods</u>			
	<u>Section</u>		
	Housing	11	33
		13	33

	<u>Conference Special Concerns Sessions</u>	<u>Conference Recommendation No.</u>	<u>Page in Vol. II</u>
	Asian American Elderly	8	162
	Poor Elderly	II-B5	155
	Rural Older People	9	149
	Spanish Speaking Elderly	III-2	168
E. <u>Eligibility for Publicly Assisted Housing</u>	<u>Section</u>		
	Housing	2 12	32 33
F. <u>Nursing Homes</u>			
1. <u>Quality</u>	<u>Section</u>		
	Facilities	28	76
	Housing	4	32
	Nutrition	2	44
	Spiritual Well-Being	4	58
	<u>Special Concerns Session</u>		
	Aging & Aged Blacks	22 29 31 32 33 34 53	183 184 184 184 184 184 186
	Aging & Deafness	IV-B IV-D V-E	137 137 138
	Asian American Elderly	12	162
	Elderly Consumer	II-8	229
	Long Term Care	4 8 13 14	107 107 108 108
	Spanish-Speaking Elderly	I-6 II-2	167 168
2. <u>Funding</u>	<u>Section</u>		
	Facilities	1	72
	Nutrition	2	44
	Spiritual	4	58
	<u>Special Concerns Sessions</u>		
	Aging & Aged Blacks	14 20 21 25 32	182 183 183 183 184

<u>Conference Special Concerns Sessions</u>	<u>Conference Recommendation No.</u>	<u>Page in Vol. II</u>
Long Term Care	1	107
	2	107
	3	107
	16	108
Poor Elderly	II-A-2	155

III. ASSURING INDEPENDENCE
AND DIGNITY

A. Services to
Maintain
Independence

Education	5	6
Facilities	1	72
	2	72
	6	72
	9	73
	22	75
	23	75
	26	76
	28	76
Government-Non-Government Housing	7	83
	4	32
	5	32
	16	33
	23	34
Income	10	39
Nutrition	5	45
Retirement Roles	4	53
Spiritual Well-Being	8	59
	10	59
	13	59
Transportation	1	65
	5	66
<u>Special Concerns Sessions</u>		
Aging & Blindness	5	128
Aging & Deafness	IV-B	137
Asian American Elderly	3	161
	11	162
Elderly Poor	II-C-1	155
	II-C-2	155
Homemaker	1	117
	2	117
	3	118
	4	118
	5	118
Long-Term Care	7	107
Mental Health	3	112
	8	112
	9	112
	10	112
Older Family	4	207
	8	207
Religious Community	6	220

	<u>Conference Section</u>	<u>Conference Recommendation No.</u>	<u>Page in Vol. II</u>
B. <u>Preparation for Retirement</u>	<u>Section</u>		
	Education	20	8
		23	8
	Employment	6	14
		15	15
	Physical & Mental Health	4	23
	Retirement Roles	3	53
		14	54
	<u>Special Concerns Sessions</u>		
	Aging & Aged Blacks	63	187
	Aging & Deafness	VIII-A	139
		VIII-D	139
		VIII-E	139
	Asian American Elderly	17	163
	Religious Community & Aging	6	220
Youth & Age	I-7	245	
C. <u>Flexible Retirement Age</u>	<u>Section</u>		
	Employment	4	13
	Facilities	10	73
	<u>Special Concerns Sessions</u>		
	Physical & Vocational Rehabilitation	4	132
D. <u>Opportunities for Involvement</u>	<u>Section</u>		
	Education	1	6
		12	7
		13	7
		16	7
	Employment	1	12
		2	12
		3	13
		5	13
		7	14
		11	14
		12	15
	Facilities	4	72
		5	72
	15	74	
	26	76	

<u>Conference Section</u>	<u>Conference Recommendation No.</u>	<u>Page in Vol. II</u>
Government-Non-Government	1	82
Income	3	38
Nutrition	5b	45
Planning	7	89
Health	Preamble	22
Retirement Roles	1	52
	5	53
	10	54
	13	54
	14	54
<u>Special Concerns Sessions</u>		
Aging & Aged Blacks	10	182
	40	185
	44	185
	47	185
	50	186
	62	187
	75	188
	76	188
	3	128
Aging & Blindness	I-B	136
Aging & Deafness	VII	138
	VIII-B	139
	VIII-C	139
	VIII-D	139
Asian American Elderly	15	163
	16	163
Indian Elderly	I-1	199
	I-2	199
Poor Elderly	I-7	154
	III-1	156
	III-2	156
	III-3	156
	II-C-1	155
Physical & Vocational Rehabilitation	1	131
	2	131
	3-A	131
	3-B	132
	3-C	132
	3-D	132
	4	132
Rural Older People	Preamble	148
	4	149
	7	149
Spanish Speaking Elderly	I-6	167
	I-7	167
Volunteer Roles	1	241
	2	241
	3	241
	4	241
Youth & Age	II-4	246

	<u>Conference Section</u>	<u>Conference Recommendation No.</u>	<u>Page in Vol. II</u>
<u>D. Educational Opportunities</u>			
	Education	2	6
		3	6
		6	6
		7	7
		8	7
		9	7
		10	7
		12	12
	Employment	5	13
		12	15
	Facilities	15	74
	Nutrition	3	44
		4	44
	Retirement Roles	1	52
		3	53
	Spiritual Well-Being	6	58
<u>Special Concerns Sessions</u>			
	Aging & Aged Blacks	6	182
		7	182
		48	186
	Asian American Elderly	17	163
	Elderly Indian (Educ.)	VII	201
	Youth & Age	I-7	245
		II-2	246
		II-5	246

E. Services for the Elderly

E. Transportation

1. Providing Mobility

Section

Education	6	6
Nutrition	5	45
Transportation	1	65
	2	65
	3	65
	4	65
	5	66
	6	66
	7	66
	8	66
	9	66
	10	66
	12	67
	13	67
	17	67
	18	67
	19	67
	21	67

Conference Special Concerns Sessions	Conference Recommendation No.	Page in Vol. II
Aged & Blindness	4	128
Aging & Aged Blacks	56	186
	57	186
	58	186
Asian American Elderly	3	161
	19	164
Poor Elderly	II-C2	155
Elderly Indian (Trans.)	1	201
Legal Aid & Urban Aged	3	235
Physical & Vocational Rehabilitation	2	131
Rural Older People	1	148
	2	149
	3	149
Spanish Speaking Elderly	1	167
	2	107
Youth & Age	III-2a	246
b. <u>Licensing and Insuring</u>		
<u>Section</u>		
Transportation	11	66
	12	67
	13	67
	15	67
	16	67
<u>Special Concerns Sessions</u>		
Volunteer Roles	6	241
F. <u>Senior Centers</u>		
<u>Section</u>		
Education	7	7
Facilities	6	72
	22	75
Housing	5	32
Nutrition	4	44
Retirement Roles	9	54
Spiritual Well-Being	10	59
	13	59
<u>Special Concerns Sessions</u>		
Aging & Deafness	V-G	138
Asian American Elderly	4	161
Poor Elderly	II-C-1	155
Religious Community	2	220
Youth & Age	III-2e	246
G. <u>Consumer Protection</u>		
<u>Section</u>		
Education	11	7
Facilities	7	72
	8	73

<u>Conference Section</u>	<u>Conference Recommendation No.</u>	<u>Page in Vol. II</u>
Housing	22	34
Nutrition	2	44
	6	44
Transportation	16	67
<u>Special Concerns Sessions</u>		
Aging & Aged Blacks	62	
Elderly Consumer	I-1	227
	I-4	228
	I-5	228
	II-1	228
	II-5	229
	II-6	229
	II-7	229
	II-8	229
	III-All	229
Legal Aid and Urban Aged	4	235
	5	235
Long Term Care	19	108
<u>H. Legal Protection</u>		
<u>Section</u>		
Facilities	9	73
	12	73
	14	74
Government-Non-Government	8	83
Health	9	24
Housing	24	34
Spiritual Well Being	11	59
	12	59
	14	59
<u>Special Concerns Sessions</u>		
Aging & Aged Blacks	45	185
Asian American Elderly	23	164
Homemaker	5	118
Indian Elderly	III	200
Legal Aid and Urban Aged	1	235
	2	235
	3	235
	5	235
	6	235
	7	235
	9	236
	10	236
	12	276
	13	236
	14	236
Religious Community	4	220
Spanish Speaking Elderly	IV-4	169
Youth & Age	I-4	245

	<u>Conference Section</u>	<u>Conference Recommendation No.</u>	<u>Page in Vol. II</u>
I.	<u>Information and Retrieval</u>		
	Education	7	7
		8	7
	Employment	12	15
		15	15
	Facilities	15	74
	Nutrition	3	44
	Retirement Roles	3	53
	<u>Special Concerns Sessions</u>		
	Aging & Deafness	I-A	136
		VIII-C	139
	Asian American Elderly	2	161
	Elderly Consumer	I-2	228
		I-3	228
	Elderly Indian	I-2	228
		I-5	228
	Youth & Age	III-1	246
J.	<u>Mental Health</u>		
	<u>Section</u>		
	Health	7	24
	<u>Special Concerns Sessions</u>		
	Long-Term Care	6	107
	Mental Health	1	112
		2	112
		3	112
		8	112
		9	112
		11	113
		13	113
K.	<u>Nutrition Assistance</u>		
	<u>Section</u>		
	Nutrition	1	44
		2	44
		3	44
		4	44
		5	45
	<u>Special Concerns Sessions</u>		
	Aged Blacks	41	185
		42	185
	Asian Elderly	18	163
	Elderly Consumer	III	229
	Rural Older People	12	149
	Spanish Speaking Elderly	Introduction	167

	<u>Conference Section</u>	<u>Conference Recommendation No.</u>	<u>Page in Vol. II</u>
IV. <u>ASSURING INSTITUTIONAL RE- SPONSIVENESS AND A NEW ATTITUDE TOWARDS AGING</u>			
A. <u>Executive Branch of The Federal Government: Central Units</u>			
	<u>Section</u>		
	Education	22	8
		23	8
	Employment	9	14
	Facilities	3	72
		19	74
	Government-Non-Government	2	82
		10	83
	Housing	19	34
		20	34
		21	34
	Income	11	39
	Planning	2	98
	Research & Demonstration	2	94
	Retirement Roles	7	53
	Training	2	98
	Transportation	14	67
	<u>Special Concerns Sessions</u>		
	Aging & Aged Blacks	90	190
	Aging & Deafness	XI	139
	Elderly Consumer	II-5	229
	Mental Health	2	112
B. <u>Planning & Coordina- tion of Aging Programs</u>			
	<u>Section</u>		
	Education	4	6
		15	7
	Facilities	3	72
	Government-Non-Government	3	82
	Health	3	23
		7	24
		8	24
	Income	10	39
	Planning	1	88
		5	89
		6	89
		10	90
	Training	2	98
	<u>Special Concerns Sessions</u>		
	Aging & Aged Blacks	74	188
		75	188
		76	188
	Asian American Elderly	5	162
		20	164
		21	164
	Elderly Consumer	I-1	227
		II-7	229
	Italian Elderly	Introduction (2)	199
	Legal Aid & Urban Poor	6	235
	Mental Health Care	7	112
	Physical and Vocational Rehabilitation	III-all	131
	Spanish Speaking Elderly	V-6	169

<u>Conference Section</u>	<u>Conference Recommendation No.</u>	<u>Page in Vol. II</u>
C. <u>Relationship of Government to Non-Government</u>		
Facilities	3	72
	4	72
Government-Non-Government	2	82
	3	82
	4	82
	6	83
Planning	1	88
	3	88
	7	89
	10	90
	11	90
Retirement Roles	5	53
Spiritual Well-Being	7	59
<u>Special Concerns Sessions</u>		
Aging & Aged Blacks	67	187
	68	187
	69	187
	70	187
	72	187
	73	187
	74	188
Poor Elderly	II-1	154
	II-C-1	155
Spanish Speaking Elderly	IV-2	169
D. <u>Reorganization for Better Delivery of Health Care Services</u>		
<u>Section</u>		
Health	1	23
	2	23
	3	23
Nutrition	1	44
	2	44
<u>Special Concerns Sessions</u>		
Aging & Aged Blacks	24	183
	25	183
	26	184
	30	184
	41	185
Aging & Blindness	2	128
Aging & Deafness	V-E	137
Asian American Elderly	3	161
	13	162
Long-Term Care	13	108
Poor Elderly	II-C-1	155
	II-C-2	155
	II-C-3	156

	<u>Conference Special Concerns Sessions</u>	<u>Conference Recommendation No.</u>	<u>Page in Vol. II</u>
	Rural Elderly	2	149
		11	149
	Spanish Speaking Elderly	II-1	168
E. <u>Needs of Special Groups</u>	<u>Section</u>		
	Education	1	6
		2	6
	Government-Non-Government	7	83
		8	83
	Housing	8	33
		23	34
	<u>Special Concerns Sessions</u>		
	Aging & Aged Blacks	1	181
		3	181
		4	181
		39	185
		55	186
		59	186
		65	187
		68	187
		74	188
		80	188
		90	190
		92	190
	Aging & Blindness	Introduction	127
		3	128
	Aging & Deafness	2	137
		14	140
	Asian American Elderly	1	161
		2	161
		5	162
		20	164
		21	164
	Indian Elderly	Introduction	195
		II-1	200
		IV-2	201
	Spanish Speaking Elderly	I-3	167
		I-7	167
		I-10	168
		III-3	168
		IV-2	169
		V-5	169
		V-6	169
		V-7	169
		V-8	169
		V-10	169
		V-11	169
	Physical & Vocational Rehabilitation	4	132

<u>Conference Section</u>	<u>Conference Recommendation No.</u>	<u>Page in Vol. II</u>
F. <u>Research and Training</u>		
Education	21	8
Facilities	27	25
Health	4	23
	5	24
	6	24
Housing	25	34
Income	10	39
Nutrition	1	44
	3	44
	5	45
Research & Demonstration	1	94
	3	94
	4	94
	5	95
	6	95
	7	95
	8	95
Retirement Roles	1	52
	13	53
Spiritual Well-Being	2	58
Training	1	98
	4	99
	5	99
	6	99
	7	99
	8	99
	9	99
	10	99
	11	99
<u>Special Concerns Sessions</u>		
Aging & Aged Blacks	60	186
	79	188
	80	188
	81	189
	82	189
	83	189
	84	189
	85	189
	88	190
	91	190
Aging & Blindness	2	128
Asian American Elderly	1	161
	16	163
Elderly Consumer	I-6	228
	I-7	229
	7	
Indian Elderly	I-9	200
	I-10	200
	I-11	200

<u>Conference Special Concerns Sessions</u>	<u>Conference Recommendation No.</u>	<u>Page in Vol. II</u>
Legal Aid	8	236
Mental Health	7	112
	12	113
	14	113
	15	113
Physical & Vocational Rehabilitation	5	132
	6	133
Religious Community	5	220
Spanish Speaking Elderly	I-9	168
	I-10	168
	II-2	168
	II-3	168
<u>G. A New Attitude Toward Aging</u>	<u>Section</u>	
	Education	6
		7
		8
		8
		8
	Employment	12
		13
	Facilities	72
		73
		74
	Government-Non-Government	82
	Health	23
	Planning	89
		89
	Retirement Roles	52
		53
		54
		54
	Spiritual Well-Being	59
		59
	Transportation	66
		67
		67
	<u>Special Concerns Sessions</u>	
	Aging & Aged Black	186
		186
		187
	Asian American Elderly	164
	Elderly Consumer	229
	Poor Elderly	156
		156
	Older Family	208
	Physical & Vocational Rehabilitation	131
	Spanish Speaking Elderly	167

<u>Conference Special Concerns Sessions</u>	<u>Conference Recommendation No.</u>	<u>Page in Vol. II</u>
Youth & Age	I-2	245
	I-3	245
	I-5	245
	I-6	245
	I-8	245
	II-1	246
	II-6	246
	III-3	247
 H. <u>Conference Follow-up</u>		
<u>Section</u>		
Employment	17	15
Facilities	18	74
Government & Non-Government	12	83
Retirement Roles	12	54
Transportation	22	68
 <u>Special Concerns Sessions</u>		
Aging & Aged Blacks	5	181
	55	186
	78	188
	93	190
Elderly Consumer	II-4	229
Legal Aid & Urban Aged	15	236
Religious Community	1	220

PART 2

FINAL REPORT OF THE POST-CONFERENCE BOARD
OF THE
1971 WHITE HOUSE CONFERENCE ON AGING

PART A: STUDY PANEL RESPONSES

PART B: STATE AND PRIVATE SECTOR RESPONSES

JUNE, 1973

(203)

TABLE OF CONTENTS

	<u>PAGE</u>
Table of Contents - - - - -	i
Introduction - - - - -	iii
PART A: STUDY PANEL RESPONSES	
INDEX TO RECOMMENDATIONS - - - - -	iv
Study Panel Responses	
Education - - - - -	1
Employment and Retirement - - - - -	35
Facilities, Programs and Services - - - - -	65
Housing - - - - -	119
Income - - - - -	153
Nutrition - - - - -	177
Physical and Mental Health - - - - -	201
Planning & Government--Non-Government Organizations - - - - -	237
Research and Training - - - - -	277
Retirement Roles and Activities - - - - -	311
Spiritual Well-Being - - - - -	341
Transportation - - - - -	365
Aging & Rehabilitation - - - - -	393
Appendix 1: Study Panel Rosters - - - - -	415
Appendix 2: Report of Congressional Action - - - - -	421
PART B: STATE AND PRIVATE SECTOR RESPONSE	
Table of Contents to Part B. - - - - -	449
Preface to Part B - - - - -	450
State Action Since White House Conference - - - - -	451
Section 1: State Legislation - - - - -	455
Section 2: State Administrative Agencies - - - - -	487
Strategies For Possible Action at State and Local Levels - - - - -	581
Report of Activities By National Organizations and Other Private Sector Groups. - - - - -	611

INTRODUCTION

At the request of the President, the Chairman of the 1971 White House Conference on Aging, created a Post-Conference Board to act as the agent of the delegates to follow up on the Conference recommendations. Responsibilities assigned to the Post-Conference Board were:

- to analyze the steps taken by public and private sectors to implement the recommendations of the White House Conference on Aging.
- to recommend strategies to accelerate action consistent with the Conference recommendations in those instances where implementation appeared inadequate.

At its first meeting, May 15, 1973, the Post-Conference Board proposed that the following procedures be followed in order to achieve the above objectives:

- appointment by the Chairman, of a review committee (Study Panel) for each of the major sections of the Conference. /1
- inclusion on each of the Study Panels of the Co-chairmen of the Section, the Chairman or his representative of related Special Concerns Sessions, and others as needed to insure an effective review of the post-Conference action. /2
- examination by each Study Panel of the responses by public and private agencies to each of the Section's recommendations in order (a) to assess the adequacy of the action taken, (b) to identify those agencies and organizations to be commended for action taken, and (c) to suggest new strategies for expediting action on those recommendations as yet unimplemented.

An Administration response to some of the recommendations of the Delegates to the Conference was set forth in the President's Message on Aging to the Congress on March 22, 1972. A second response was prepared in September, 1972, and updated as of April, 1973 to reflect Congressional action and the President's "State of the Union" and "Budget" Messages. Both of these documents were available to the members of the Study Panel.

/1 See Page 415 for Study Panel memberships.
/2 Subsequently, on the recommendation of the Board Executive Committee and with mail approval of the Board members, the Study Panel membership was expanded to include representatives of minority groups, rural and poor elderly, old people's organizations, and youth.

Another source of information on governmental action was provided by the United States Senate Special Committee on Aging. This Committee kept the Study Panels current with Congressional action by periodically providing summaries of the legislation passed or under consideration related to the Conference recommendations. The most current of the Committee's reports of legislation passed or considered since the 1971 White House Conference on Aging, and one which reflects the information available to the Study Panels in carrying on their work, will be found beginning on page 421.

Over the last year, the Study Panels held meetings in Washington and also carried on their work by mail. On the basis of these efforts, each Study Panel has prepared a report for the consideration of the Post-Conference Board in accordance with the Board's instructions. These reports have been assembled as Part A.

The focus of the White House Conference on Aging was on the development of a national policy on aging which would not only give direction to the efforts of the Federal government and the Congress in meeting the needs of older people, but which would also guide the States in developing policies and programs in aging. In order to assess the amount and nature of State and local action, information was solicited from State Agencies. Reports of the results were prepared but, because of the incompleteness of the returns at the time the Study Panels met, they were not reviewed by the Study Panels. These reports are contained in Part B of this volume together with the recommendations of members of the Study Panels relative to strategies for action by State and local government units.

The delegates also addressed recommendations to the private sector. A report of the activities related to the implementation of these recommendations and other relevant programs which have come to the attention of the National Center for Voluntary Action and the Steering Committee of National Organizations for Services to Older Persons in their own homes, is presented beginning on page 611.

* * * *

The Post Conference Board takes no responsibility for the responses of the Administration listed under each recommendation or the Congressional report contained in the Appendix. The responses were furnished to the Post Conference Board and reflect, respectively, the views of the Administration and Congress.

The evaluation of the responses, and the Board findings and opinions are contained solely in the Study Panel responses.

PART A:
STUDY PANEL RESPONSES

v

(vi=blank)

INDEX TO RECOMMENDATIONS

<u>Section</u>	<u>Page</u>	<u>Section</u>	<u>Page</u>
<u>EDUCATION</u>		<u>FACILITIES, PROGRAMS & SERVICES</u>	
Preamble	1	Preamble	65
Recommendations & Responses		Recommendations & Responses	
I	2	I	66
II	4	II	69
III	5	III	71
IV	7	IV	73
V	8	V	74
VI	10	VI	76
VII	12	VII	79
VIII	14	VIII	81
IX	15	IX	82
X	17	X	84
XI	18	XI	85
XII	19	XII	87
XIII	21	XIII	90
XIV	19	XIV	92
XV	22	XV	93
XVI	23	XVI	95
XVII	24	XVII	97
XVIII	25	XVIII	98
XIX	26	XIX	99
XX	28	XX	100
XXI	30	XXI	101
XXII	31	XXII	102
XXIII	32	XXIII	105
		XXIV	106
		XXV	108
		XXVI	110
		XXVII	112
		XXVIII	113
		XXIX	115
<u>EMPLOYMENT & RETIREMENT</u>		<u>HOUSING</u>	
Preamble	35	Preamble	119
Recommendations & Responses		Recommendations & Responses	
I	37	I	121
II	39	II	122
III	41	III	123
IV	43	IV	124
V	45	V	125
VI	48	VI	126
VII	50	VII	127
VIII	51	VIII	128
IX	52	IX	129
X	54	X	131
XI	55	XI	132
XII	56	XII	133
XIII	57	XIII	134
XIV	58	XIV	135
XV	59	XV	136
XVI	60	XVI	137
XVII	61	XVII	138
		XVIII	139
		XIX	141
		XX	142
		XXI	143
		XXII	144
		XXIII	145
		XXIV	146
		XXV	147

INDEX TO RECOMMENDATIONS [CONT'D]

<u>Section</u>	<u>Page</u>	<u>Section</u>	<u>Page</u>
<u>INCOME</u>		<u>PLANNING & GOVERNMENT ORGANIZATION</u>	
Preamble	153	Preamble	237
Recommendations & Responses		1. <u>Planning</u>	
I	154	Recommendations & Responses	
II	158	I	238
III	161	II	240
IV	162	III	243
V	163	IV	248
VI	164	V	243
VII	165	VI	249
VIII	166	VII	251
IX	169	VIII	252
X	171	IX	254
XI	175	X	254
XII	176	XI	258
		XII	259
<u>NUTRITION</u>		2. <u>Government & Non-Government</u>	
Preamble	179	<u>Organizations</u>	
Recommendations & Responses		Recommendations & Responses	
I	181	I	260
II	185	II	262
III	187	III	264
IV	189	IV	265
V	192	V	266
VI	197	VI	267
		VII	268
<u>PHYSICAL & MENTAL HEALTH</u>		VIII	269
Preamble	201	IX	271
Recommendations & Responses		X	272
I	202	XI	273
II	205	XII	274
III	207	<u>RESEARCH & TRAINING</u>	
IV	211	Preamble	277
V	213	1. <u>Research</u>	
VI	215	Recommendations & Responses	
VII	218	I	279
VIII	219	II	281
IX	220	III	283
Explanatory Note	222	IV	285
X	223	V	286
XI	224	VI	287
XII	227	VII	288
XIII	228	VIII	289
XIV	230	2. <u>Training</u>	
XV	231	Recommendations & Responses	
XVI	232	I	290
XVII	233	II	296
		III	298
		IV	299
		V	300
		VI	301
		VII	301
		VIII	302
		IX	303
		X	304
		XI	305
		XII	306
		Concluding Statement	307

INDEX TO RECOMMENDATIONS [CONT'D]

<u>Section</u>	<u>Page</u>	<u>Section</u>	<u>Page</u>
<u>RETIREMENT ROLES & ACTIVITIES</u>		<u>TRANSPORTATION</u>	
Preamble	311	Preamble	365
Recommendations & Responses		Recommendations & Responses	
I	312	I	366
II	317	II	368
III	320	III	369
IV	323	IV	370
V	326	V	371
VI	328	VI	372
VII	329	VII	373
VIII	330	VIII	374
IX	331	IX	375
X	332	X	376
XI	333	XI	377
XII	334	XII	378
XIII	335	XIII	379
XIV	336	XIV	380
XV	337	XV	381
<u>SPIRITUAL WELL BEING</u>		XVI	382
Preamble	341	XVII	383
Recommendations & Responses		XVIII	384
I	342	XIX	385
II	343	XX	386
III	343	XXI	387
IV	345	XXII	389
V	347	<u>SPECIAL CONCERNS SESSIONS ON AGING</u>	
VI	348	<u>& REHABILITATION</u>	
VII	350	Preamble	393
VIII	352	Administration Response	394
IX	353	Aging & Blindness Recommendations	
X	354	& Responses	
XI	355	I	396
XII	356	II	397
XIII	358	III	398
XIV	359	IV	399
XV	360	V	400
		Physical & Vocational Rehabilitation	
		of Older People & Recommendations	
		& Responses	
		I	401
		II	403
		III	405
		IV	409
		V	410
		VI	411
		Study Panel Response on Aging &	
		Deafness	412

EDUCATION

xi

(xii=blank)

Report of Study Panel

EDUCATION

Preamble

The Study Panel reviewing the Administration's actions on the recommendations made by the section on Education recognizes with satisfaction the tremendous momentum generated by the 1971 White House Conference on Aging.

A significant change in the philosophy of education must occur, however, before the full intent of these recommendations will be realized. Education must no longer be seen as a means - as primarily an investment in the future - but as an end in itself. The fact of learning should be sufficient reason for its pursuit. Our present value system implies that a person's future ends when he retires from the paid work force. Thus, that society condemns its older members to having no future and therefore no need to learn and to grow.

A corollary to this change in attitude toward education will be the acceptance of lifelong continuing education. The members of the study panel did not see adult education as just for the older population; many of the recommendations and many of the panel's comments apply equally to any age group. Education for the older members of the population, as well as education about aging for all age groups, is needed to further the new attitude toward aging and the aged visualized by the delegates to the White House Conference on Aging.

The members of the panel fervently hope that the Federal government will continue to work actively along the lines outlined in the report as well as seeking other ways to expand educational opportunities for the adult population. Specific action which the panel sees could be taken immediately would be the allocation of a certain percentage, i.e. 10%, of the Research and Demonstration Funds of Administration on Aging for education for the elderly. Secondly the panel feels that subsequent conferences on aging are needed to continue the emphasis and focus on the problems of the aging.

Finally, because the critical shortage of trained persons to work in education and other areas of aging, the Study Panel is most concerned with the Administration's decision to discontinue the Administration on Aging's Title V/training program.

RECOMMENDATION I

All issues and recommendations which will affect or serve linguistically/culturally different populations must enlist the necessary linguistically/culturally different qualified expertise in the development processes of such proposals so as to insure that all programs designed for the elderly will result in maximum utilization and participation of the constituents in question.

A. Administration Response

1. "The Administration believes that programs in the field of aging must take into account the special circumstances that are unique to each minority group and the handicapped."
2. "On the recommendation of the Cabinet-level Committee on Aging, the Administration on Aging will require State planning groups on aging to include representatives of minority groups on their advisory bodies."
3. "The Administration has taken several steps to ensure that Federal, regional and area offices are staffed with persons sensitive to the problems of minority groups."
4. "Minority groups are represented on the Post-Conference Board of the White House Conference on Aging."
5. "The Office of Management and Budget devotes considerable time and effort to making sure that Federal programs in aging are reaching all Americans -- including minorities -- in an equitable fashion."

B. Response of Study Panel

The Administration's response is seen as a good baseline from which to achieve the purpose expressed in the recommendation.

To further implement this recommendation, the panel believes the extent to which the Amendments to the Older Americans Act support research and demonstration will be vital. Monies should be allocated to survey needs and characteristics of minority groups. It is important to know: where they are located, the pattern of their life styles, their aspirations and needs so that these can be met more adequately. The use of surveys before and after the White House Conference on Aging and experience gained from Project FIND might be useful sources of information for realizing this objective.

The Administration on Aging should establish procedures requiring State Directors on Aging to certify that representatives of minority cultural groups are included in all appropriate agency programs.

There is a need to determine where the professionals from minority groups are working so they can be involved in Agency programs. This will include sociologists, psychologists, M.D.'s etc. This compilation could probably be done best by professional societies and national organizations which represent minority groups.

RECOMMENDATION II

Particularly urgent are Federal, State and local funds for bilingual/bicultural education to the non-English-speaking elderly pertaining to instructions relating to the requirements of Federal, State, and local government agencies, i.e., gaining citizenship, applying for Social Security, housing applications, etc.

A. Administration Response

1. See also Item 3, under Recommendation I.
2. "Labels for donated foods are now available in Spanish. To assist other ethnic groups, the Department of Agriculture is introducing a new system of label improvements including illustrative mixing instructions, nutritive information and color sketches of container contents."
3. "The President launched Project FIND --- a major outreach effort to identify older Americans who are "lost to society." (This effort included) "a special Spanish radio announcement (for distribution) to stations in areas with large Spanish-speaking populations."

B. Response of Study Panel

In general, we believe the Administration's response is a good one, particularly the response which reports that the Administration has taken several steps to ensure that Federal, Regional and area offices are staffed with persons sensitive to the problems of minorities and in possession of appropriate linguistic abilities. The personal face-to-face approach is generally more useful because many people have greater difficulty in comprehending written materials than they do verbal explanations. While the panel concurs that it is important to have non-English information books and pamphlets, detailing the instructions and requirements for government programs available, we recommend that there should be better means to provide the information verbally. Non-English programs and ads on TV and radio would be useful. As the technology of video tape systems for TV and Cable TV is developed, this could be extremely helpful to individuals in their homes. They could elect when they wanted to hear needed information. They could repeat this as often as needed. Ethnic clubs, outreach volunteers fluent in the language, and bi-lingual children could be employed to explain to non-English speaking how to participate in government programs. The Study Panel underscored their reaction to the above recommendation for the need for face-to-face encounters with non-English speaking Elderly as well as the need to emphasize verbal rather than written communication.

RECOMMENDATION III

Education for older persons should be conducted either apart from or integrated with other groups according to their specific needs and choices. Where feasible and desirable the aged must be granted the opportunity to take advantage of existing programs with both old and young learning from each other. However, alternatives must be provided which emphasize the felt needs of the aged at their particular stage in the life cycle.

A. Administration Response

1. "Consistent with the resources that may be available at any given period of time, the Administration will work with State and local governments and the private sector in order to facilitate progress... (by providing) opportunities for interaction between the young and other adults."
2. "The Administration believes that pre-retirement education should become an integral part of the personnel policies of employers in both the public and private sectors."
3. "The Administration believes that community level plans to develop comprehensive and coordinated services to older persons should include plans for expanding educational opportunities."
4. "Guidelines furnished the States under the Older Americans Act will provide that due consideration be given to educational services in the planning of coordinated and comprehensive service programs for older persons."
5. "The Administration will pursue a policy of encouraging States, local school districts and institutions of higher learning, where appropriate, to utilize a larger proportion of Federal funds allocated to them, including vocation and adult education funds, to provide older persons with educational opportunities."
6. "The Assistant Secretary for Education will personally urge State chief school officers to give more consideration to the needs of older persons in the formulation of programs which utilize Federal resources."

B. Response of Study Panel

To the extent that this recommendation encourages communities to make maximum use of local resources for education and to be responsive to valid educational needs in their communities, it is a very important guideline.

The recommendation does not pinpoint the primary responsibility for education of the aging. Therefore, this problem is seen as a topic for continued discussion by all groups, public and private, involved in helping to meet the needs of the aging.

Both the guidelines furnished the States under the Older Americans Act and the demonstration projects of the Administration on Aging should help realize the recommendation's goal: greater educational opportunity for older persons. The Panel recommends that the Office of Education become actively involved in realizing these goals and that adequate funds be provided the Office of Education to develop personnel and other program resources.

RECOMMENDATION IV

The expansion of adult educational programs having a demonstrated record of success should receive higher priority with due consideration being given to experimental and innovative programs.

A. Administration Response

1. "The Administration believes that community level plans to develop comprehensive and coordinated services to older persons should include plans for expanding educational opportunities."
2. "Guidelines furnished the States under the Older Americans Act will provide that due consideration be given to educational services in the planning of coordinated and comprehensive service programs for older persons."
3. "The Assistant Secretary for Education will personally urge State Chief school officers to give more consideration to needs of older persons in the formulation of programs utilizing Federal resources."

B. Response of Study Panel

Although we concur with the Administration's desire for coordinated, comprehensive services that would include the expansion of educational opportunities for older persons, the Study Panel believes that the control issue is the Assignment of responsibility to implement this goal. The Panel is pleased that the Assistant Secretary for Education will take a personal role in supporting the educational needs of the elderly, and it feels the Older Americans Act will provide helpful guidelines. But until the U.S. Office of Education is charged with an on-going commitment to educate older Adults and is given the necessary staff support, the Study Panel contends that the Recommendation will not be implemented fully.

To avoid duplication of programs, public and private agencies offering adult education courses should coordinate their offerings within a community.

The Administration on Aging should allocate at least 10% of its Research and Demonstration money (Title IV) to encourage and develop innovative, experimental programs in the field of education for the aging.

Universities, and institutes of gerontology, when established, must be looked to for development and evaluation of experimental and innovative programs.

RECOMMENDATION V

Educational opportunities must be afforded all persons, with special effort made to reach those who, because of low income, poor health, social circumstances, or ethnic status are less likely to respond voluntarily. Outreach programs should use all appropriate channels and delivery systems.

A. Administration Response

1. "The Administration believes that progress in the field of aging must take into account the special circumstances that are unique to each minority group and the handicapped."
2. "A portion of these funds [Older Americans Act] for the support of services for older persons can and should be utilized to open up the doors of continuing education for older persons -- doors that are shut in far too many communities of the Nation.

The Administration on Aging has made a start in this direction by making a grant to the Adult Education Association for a comprehensive inventory of opportunities provided for older people by public school, university extensions, agricultural extension, and other adult education agencies. The grant provides, also, for an inventory and evaluation of the literature relative to education for older Americans. It is expected that these activities will stimulate significant expansion of educational programs for middle-aged and older people.

The Adult Education Association will be concerned with pre-retirement, consumer, cultural, health, vocational, and avocational education."

B. Response of Study Panel

In order to implement this recommendation, ways must be found to reach people who do not relate to the educational system. Questions such as the following must be asked and answered:

1. Does the present system appeal to older people?
2. What needs of older people could be met by adult education courses?
3. How can attitudes be changed to help mature people feel that continuing education is worthwhile?

The panel endorses the efforts undertaken by the Administration on Aging, and urges that these be continued.

There must be a move away from traditional education. Courses must be conducted in different settings and in new formats. It is very important that educational opportunities are available where people are; i.e., public housing projects, churches, senior centers, labor union halls, libraries and homes. This can be accomplished by use of television and video cassettes to peoples' homes. Senior citizens centers, which provide meals, are settings which offer immediate opportunities for providing educational services for older people.

The Study Panel endorses the need to make special efforts to reach those who because of low income, poor health, or social circumstances are not likely to respond voluntarily. The Panel feels that the strengthening of public libraries to offer educational programs to older people is a step in the right direction. The Panel also endorses greater use of the mobile library unit.

RECOMMENDATION VI

For older persons to participate in educational programs, agencies, organizations, and government must provide incentives. These incentives should be aimed at eliminating specific barriers to the availability and accessibility of educational services for older persons including transportation, free attendance, subsistence, auditing privileges, relaxed admission requirements, flexible hours, convenient locations, subsidies to sponsors, and removal of legal barriers.

A. Administration Response

1. "The Administration supports the use of the Administration on Aging model project funds to inaugurate, in coordination with the Office of Education, demonstration projects designed to establish continuing education projects for older persons.

....These projects will....be designed to show how educational services can become an integral part of coordinated and comprehensive programs for older persons."

2. "The President...has directed that all Federal grants which provide services for older persons also ensure that the transportation needed to take advantage of these services is available." (In line with this, new guidelines are to be issued which require a transportation component in all State plans under Title III of the Older Americans Act.)

B. Response of Study Panel

There are many barriers to older people preventing them from seeking opportunities for continuing education. These may be economic, social and psychological. The Administration's response indicates a number of ways to make education more easily available to them.

The panel sees the need to promote the idea that older people can enjoy learning and take pleasure in new insights and new skills. Furthermore, they can find uses for their new knowledge and appreciate being a student at any age. All educational institutions must incorporate into their educational philosophy the concept of life cycle learning, meaning that a person does not stop having educational experiences when he completes his formal education.

In conveying the advantages of continuing education, use should be made of people who are familiar with the concept, who have taken preretirement courses. Public forums, newspapers, and libraries are all a part of the milieu where the role of the older learner can be legitimized in the eyes of the general population as well as in the eyes of older people.

Some direct financial incentives are needed. For example, either through the income tax or through the social security retirement test, some allowance should be made for money spent on education, especially retraining costs.

RECOMMENDATION VII

Public libraries serve to support the cultural, informational, and recreational aspirations of all residents at many community levels. Since older adults are increasingly advocating and participating in lifetime education, we recommend that the public library, because of its nearby neighborhood character, be strengthened and used as a primary community learning resource. Adequate and specific funding for this purpose must be forthcoming from all levels of government and most important from private philanthropy.

A. Administration Response

1. "The Office of Education's Bureau of Libraries and Learning Resources has funded research and demonstration projects in two branch libraries in five metropolitan areas--Atlanta, Cleveland, Detroit, Houston, and Queens Borough--to test the relevance of libraries as information centers in neighborhoods."

B. Response of Study Panel

One of the 1972 amendments to the Older Americans Act of 1965 proposed older readers service. Under this program, organizations such as the American Library Association, State Library Association, and Universities and organizations for older people could have been mobilized to provide genuine leadership so that the new funds would have been utilized effectively. The U.S. Office of Education and the National Library Association could have acted as a clearinghouse to transmit information and descriptions of successful innovative programs to the libraries and other agencies.

The panel underscores the strategy that public library services can move extramurally, i.e., out of fixed buildings. The

establishment of satellite libraries and the greater use of mobile facilities can make the library more accessible to the elderly and truly a primary community learning resource. A demonstration of models of comprehensive library services for the elderly in Kentucky holds promise along the lines of the recommendation. The mobile library unit provides for study and reading space, audio-visual equipment and exhibit areas. In addition, it will incorporate tax assistance services. Although this project seeks especially to help the rural elderly, the mobile unit library has as much potential in urban and suburban settings. By bringing a complete library service to their residences (not just books) older people may be helped to overcome feelings of suspicion and inadequacy which often keep them from using the public libraries.

Libraries are also seen as places where older people can assume useful roles as aides, as story tellers, and as narrators of local history with local historical associations.

Another route for the greater use of the public library, as a community focus on lifelong learning, would be the offering of joint programs with State agencies, homemakers clubs, extension agents.

The urban demonstration projects funded by the Bureau of Libraries and Learning Resources, together with demonstration projects in other communities, can provide helpful knowledge in this area, but considerably more effort must be made to develop appropriate library and educational services for older Americans living in small towns and rural areas, many of which have no libraries with branches as are found in large cities.

RECOMMENDATION VIII

We recommend further that the Library Services and Construction Act be amended to include an additional title to provide library services for older persons.

A. Administration Response

1. No response.

B. Response of Study Panel

Enactment of the 1972 Amendment to the Older Americans Act, Title II, Older Readers Services would have fulfilled the requirement in this recommendation. The panel learned that there was fruitful partnership between the Office of Education's Bureau of Library, Education and Technology, the American Library Association, and private organizations in writing the requirements in this legislation.

RECOMMENDATION IX

Emphasis should be given at every level of education to implement and expand the expressed educational objective of "worthy use of leisure." Education must be directed toward an acceptance of the dignity and worth of non-work pursuits as well as development of leisure skills and appreciations.

A. Administration Response

1. "The Administration (See #1 under Recommendation VI).... These model projects will be designed to show how making educational opportunities available for older persons can result in their being prepared for paid or volunteer services in the community, for a meaningful use of leisure time, and for personal fulfillment."
2. "The Office of Education and the Inter-Agency Council on the Arts and Crafts are working on a five-year plan to help the elderly fill their leisure time with creative activities.

Under this program, craft centers would be established at State and regional levels where both the young and the elderly could be instructed in traditional arts and crafts. Senior citizens would be employed as teachers, thus assuring not only enrichment of their own lives, but guaranteeing that traditional skills will be passed along to future generations.

Planning is also underway for establishment of a National Academy for the Arts and Crafts where gifted senior craftspeople could instruct youth in the centuries-old skills centered in the Appalachians, as well as in the Spanish and Indian cultures. In addition, State aging agencies are being encouraged to examine resources in the arts available in their communities in order to provide new approaches to reduction of isolation. As a result of an Administration on Aging grant to the National Council on the Aging, a prospectus was developed to provide those working with the elderly, the arts community, and older people themselves with a greater awareness of the potential of arts programs for enriching the lives of the elderly."

B. Response of Study Panel

This recommendation reflects a new philosophy. However, until a large number of people have experienced retirement, greater leisure, new life styles, and until the pervasiveness of the Protestant work ethic has diminished in our culture, this philosophy of the value of non-work pursuits will have little general acceptance. Schools educating the very young can play an important role in accelerating the adoption of this philosophy by helping them build a reservoir of meaningful activities and skills which may be used in non-work pursuits.

Educational programs are among the most important means to help people create more meaningful leisure roles for themselves. Older people should have the opportunity to be aware of their options. With better understanding of the opportunities possible with expanded leisure time, older persons will find new, more meaningful roles for themselves.

Researchers should be studying the meaning of work and retirement as it relates to the fact that leisure is becoming a larger part of the life of a significant portion of the population. This is a relatively recent experience. It is predicted that the life pattern which compartmentalizes learning, working and retirement respectively to youth, middle-age and old-age may be changed so that a person can partake of all three activities throughout life.

The idea that "the worthy use of leisure" negates the importance or value of the work ethic should be dissipated. Other persons should not have their values unnecessarily destroyed, and the young should not be introduced to work-leisure as a dichotomy.

RECOMMENDATION X

Money and manpower for educational opportunities must have high priority throughout all services offered to older persons by any approved public or private agency or organization in order to assure continued, meaningful living.

A. Administration Response

1. See Administration Response to Recommendation IV.
2. "The President asked Congress for the full authorization of \$100 million to implement the Nutritional Program for the Elderly (Title VII of the Older Americans Act.)... (Title VII) emphasizes the provision of group meals at sites preferably within walking distance of the older persons' residences. The law also provides for supporting social services to the elderly participants in the nutrition program. These may include...nutrition education."

B. Response of Study Panel

Education is so fundamental and central that whenever older persons are involved in any service programs, the educational possibilities should be considered. When planning new services, public and private organizations should be required to include an appropriate educational component and provide the proper training and/or education needed to carry out the project.

Multipurpose senior centers are seen as particularly rich in opportunities for education of older persons in such topics as consumer education, nutrition, adjusting to one's community and getting along with one's peers.

The responses by the Administration that: (1) the guidelines to be furnished under the Older Americans Act will insure that due consideration be given to educational services in the development of coordinated, comprehensive service programs to older persons; and (2) that supporting social services provided for under the Title VII Nutritional Programs for the elderly include education, implement the philosophy stated above. However, the panel recommends that the Administration on Aging review its ongoing programs periodically to insure that the opportunities for education are being expanded and funded and that new or proposed programs incorporate educational features. Other Federal departments or agencies with programs affecting the elderly should be reminded to incorporate educational features whenever possible.

RECOMMENDATION XI

Educational opportunities must include basic, continuing, vocational education, and training about needs for better use of services, cultural enrichment, and more successful adjustment to aging.

A. Administration Response

1. See #1 under Recommendation IX.
2. "The Administration believes that pre-retirement education should become an integral part of the personnel policies of employers in both the public and private sectors. Major emphasis should be placed on preparation for continued involvement in the life of society subsequent to retirement."
3. "The Office of Consumer Affairs is publishing guides for the consumer education of adults, with a section directed towards the needs of the elderly. In connection with this project the Department of Health, Education and Welfare is cooperating in developing a program of technical assistance helping the States create consumer education projects specially designed for the older citizens. The Bureau of Adult, Vocational and Technical Education plans to request proposals for curriculum development in consumer education with the aged as a major target group. Consumer and homemaker education courses are now being provided for the elderly on a limited basis at the local level."
4. See #2 under Recommendation V.

B. Response of Study Panel

The Administration's support of the concept of pre-retirement education and its efforts to develop targeted special education must be recognized as progress toward the achievement of this recommendation. However, to genuinely address this Recommendation as a National goal, a broader, more extensive effort must be made within the public and private sectors to develop a new philosophy of aging which perceives older persons as having potential for growth & social contribution throughout the life span.

Initially this will call for an attitude change which accepts the notion that education is a lifetime job that does not stop with the completion of formal education.

Strategies to accomplish this might include: (1) libraries offering basic education courses in reading, writing and computation for the illiterate or near illiterate, because the atmosphere in a library may be more conducive to learning than the traditional school classrooms; (2) using older retired persons as teachers and trainers for people of all ages; (3) making counseling available so that people may explore the possibilities of other careers; (4) planting ideas in early education that individuals should have the opportunity to plan for and realize more than one career; and (5) teaching of techniques for more successful adjustment to aging in universities and training centers which prepare men and women for working with older persons.

RECOMMENDATION XII

Public expenditures for education for older persons must be increased and directly related to the proportion of older persons within the population. These expenditures should relate to the needs articulated by all segments of the population of older persons including rural and ethnic minorities or by the organizations that represent older persons.

and

RECOMMENDATION XIV

The Federal Government must consider the concerns of educational programs of older persons in a greater equity of allotment and on a higher priority basis when allocating funds for educational programs.

A. Administration Response

1. "The Administration will pursue a policy of encouraging States, local school districts and institutions of higher learning, where appropriate, to utilize a larger proportion of Federal funds allocated to them, including vocational and adult education funds, to provide older persons with educational opportunities."
2. "The Assistant Secretary for Education will personally urge State chief school officers to give more consideration to the needs of older persons in the formulation of programs which utilize Federal resources."
3. "The Administration has proposed amendments to the Older Americans Act which...call for special attention to be given to assuring opportunities for the involvement of older persons in the planning of comprehensive and coordinated systems (for the delivery of services). Guidelines for use by State and sub-State planning agencies will be disseminated to the States once the amendments have been enacted into law."

B. Response of Study Panel

The Panel recognized these two recommendations (XII and XIV) were written with the strong feeling that older persons were not receiving their share of public expenditures for education. The Panel reiterates the need for greater public expenditures for education for older persons. The Panel believes the Administration could take more direct and more forceful action to provide education suitable for older persons than the response indicates.

RECOMMENDATION XIII

Available facilities, manpower and funds must be used for educational programs designed and offered on the basis of the assessed needs and interests of older persons. The initiative may be taken by many sources, but the design and curriculum must include active participation by older persons.

A. Administration Response

1. See #3 under Recommendations XII and XIV.

B. Response of Study Panel

That older persons are to be involved in planning and executing programs involving older people reads like a litany through the recently passed legislation. Point 2 under the Congressional Legislative Action which provides under the Amended Adult Education Act the authorization of such funds as may be necessary for education programs to assist the culturally or linguistically handicapped elderly responds to the thrust of this recommendation. The Federal government must use its power and influence and ability to limit funds to make sure the requirement of involvement of participants is carried out in the spirit conveyed in this recommendation.

The involvement and participation of older people was exemplified in the planning and actions of the 1971 White House Conference on Aging. Every effort must be made to safeguard their contributions and to insure they are not again overlooked after the Post Conference year.

RECOMMENDATION XV

Where matching funds are required for Federal education programs aimed to assist older persons, it is recommended that the life-long contributions toward building this country by the now elderly be considered as suitable compensation in lieu of "matching funds."

A. Administration Response

No response

B. Response of Study Panel

The Study Panel does note that Title VIII of the 1972 Older Americans Act Amendment for library service provides for 100% funding. The panel realizes that non-matched monies cannot be applied universally but it is hoped that the Administration and Congress will make 100% funding available to services for the elderly where necessary and possible.

RECOMMENDATION XVI

Education should place emphasis on instruction to help the older persons understand issues, procedures and action in regard to political processes to enable them to meet more effectively and quickly their special needs as individuals or as a group.

A. Administration Response

No response.

B. Response of Study Panel

Older people should have opportunities to take courses in citizenship so they may be more effective citizens. Citizenship courses would be most suitably sponsored by organizations without political party affiliations such as the League of Women Voters. National Education Television might develop programs on citizenship in both English and Spanish.

RECOMMENDATION XVII

Appropriate materials and methods about all aspects of aging, must be developed and introduced in the curricula at all levels of education from pre-school thru higher education.

A. Administration Response

1. "Consistent with the resources that may be available at any given period of time, the Administration will work with State and local governments and the private sector in order to facilitate... (the development) of a better understanding of aging and the aged by preparing materials for the media and including appropriate materials in the curriculum at all levels of education.

Older persons are the victims of a lack of understanding of both aging and the aged. They will continue to be the victims of "ageism" until this situation is corrected. Both the communications and educational communities can help improve understanding. This Administration plans to consult and work with leaders in the communications and educational fields in an effort to transform talk into action."

B. Response of Study Panel

Courses on "preparation for life" including sections on the aging process, the aging individual, and problems of aging must become part of the curriculum of grade and high schools. Youth organizations, church groups are seen as other forums outside the schools where such understanding can be fostered. However, there is a lack of suitable materials for sources on life preparation and the problems of aging for that educational level. Some strategies to hasten general understanding of aging could include: (1) development of materials for short-term refresher courses for teachers; (2) use of older persons to teach about aging since they speak from firsthand knowledge; and (3) at the university level incorporating units in gerontology in the broad curriculum and not including this only in courses in sociology or gerontology.

RECOMMENDATION XVIII

A national awareness campaign must be initiated through mass media and through educational systems to promote better understanding by society of the nature of the aging process, the needs and interests of older people, and the positive contributions and potentially untapped resource of older persons.

A. Administration Response

1. See #1 under Recommendation XVII.

B. Response of Study Panel

The 1971 White House Conference on Aging was a monumental attempt to make known and promote understanding of the needs of older persons. The impetus must not be dissipated. Therefore, the panel recommends that conferences be convened every three years, (The so-called mini White House Conferences) to evaluate the programs and steps taken, to share experiences, to devise strategies to respond to new needs and generally to continue focusing attention on the interests of older Americans.

In creating a new national attitude toward aging, the positive aspects of aging should be stressed. We judge that the state gerontological societies are closer to older people than the national groups. Therefore, they can play a leading role in bringing about a new awareness and understanding of aging. They can promote campaigns, encourage the designation and utilization of Senior Citizen Days, essay contests, awards to outstanding older citizens, etc.

RECOMMENDATION XIX

All educational resources must be pressed into service for the needed leadership in the preparation and implementation of: (a) leadership training, (b) teacher training, (c) curricula, and (d) needs of the older persons in America.

A. Administration Response

1. "Administration policies in the following areas will help institutions of higher learning to initiate, strengthen and expand programs designed to attract persons to and prepare them for careers in the field of aging:
 - a. Providing financial assistance to students in higher education with the understanding that they will then be free to use this assistance in order to pursue any specialized program they desire to pursue.
 - b. Providing central coordination for the Federal government's programs of research in aging so that the large investment of resources in this area will be related to agreed upon objectives.
 - c. Using Federal dollars to encourage the development of comprehensive and coordinated service programs for older persons at the community level."
2. "Colleges and universities will from time to time have the opportunity to participate in training programs designed to meet the specific needs of Federal departments and agencies for trained personnel in aging."
3. "The Administration will provide a focal point within the governmental structure for those colleges and universities that have made or will make a commitment to the field of aging."
4. See also #3 under Recommendation IV.
5. See #2 under Recommendation V.

B. . Response of Study Panel

The Administration's response to this recommendation is twofold: The first states that the Administration on Aging and the Office of Education are developing a program to assess educational needs of older persons. To identify ways to meet these needs would seem more directly related to the recommendation. In evaluating the response to other recommendations, the Study Panel has called for analysis of what are the educational needs of older persons (Recommendation V) and has recommended the development of curricula (Recommendation XVII). The Study Panel hopes that the Administration on Aging and the Office of Education will pursue this project with a sense of urgency and will fund related studies concurrently. When the ways of meeting the needs are identified, they should take steps to implement them throughout the country.

The second response by the Administration interprets the recommendation as recognizing the need for professionally trained people to work in programs serving the elderly. The panel observes that there is a critical shortage of trained manpower to work in fields serving the elderly and the panel doubts that men and women can be trained fast enough to meet the growing demand. Accordingly, the Study Panel is considerably concerned over the Administration's recent decision to discontinue Administration on Aging training programs effective June 30, 1974.

RECOMMENDATION XX

Preretirement education programs must be established to help those approaching retirement age to achieve greater satisfaction and fulfillment in later years. Preretirement education must be the primary responsibility of the public education sector in cooperation with relevant community organizations in the areas of industry, labor, all levels of government, voluntary service, and private associations.

A. Administration Response

1. "The Administration believes that pre-retirement education should become an integral part of the personnel policies of employers in both the public and private sectors. Major emphasis should be placed on preparation for continued involvement in the life of society subsequent to retirement."
2. "The Departments and agencies of the Federal Government will be urged to set an example for other employers by initiating or strengthening pre-retirement programs under the leadership of the U.S. Civil Service Commission."
3. "The Administration will support the use of funds by the Administration on Aging to conduct, in coordination with the Office of Education, model projects for pre-retirement education."
4. "The Departments of Labor and Commerce will provide leadership designed to add significantly to the numbers of employers who provide pre-retirement education for their employees."
5. "The Administration on Aging, in cooperation with the Office of Education, will develop materials designed to identify the roles that educational institutions at all levels are equipped to perform in the field of pre-retirement education."

B. Response of Study Panel

Fairly substantial efforts in providing preretirement programs were underway before the 1971 White House Conference on Aging. The Panel points out that the summary of the Administration's efforts has overlooked programs in other parts of the Federal government such as those in the Departments of Agriculture, the Army, and the Social Security Administration. The Panel notes the use of the future tense in the Administration's responses and trusts that the emphasis and activities suggested are indeed being actively pursued.

The Study Panel is convinced that the recommendation from the White House Conference on Aging will not be implemented fully until the U.S. Office of Education has an on-going commitment to educating adults and has a strong staff component. Until adult education is given visibility and substantial funds at the State level as well as at the Federal level, nothing much will happen.

This country might look to the experience in Scotland and England where local councils to provide preretirement education are supported by industry and government. In the U.S. the government might seek the cooperation of industry, labor unions and national membership organizations to establish networks of retirement counseling centers.

There is an increasing demand for qualified persons to conduct preretirement courses. An immediate step in making quality preretirement education widely available would be training for people to conduct such classes.

As Institutes of Gerontology and the multi-disciplinary centers are established, one of their responsibilities should be in the field of preretirement education to develop materials and to train teachers. Staffs in the personnel offices of private and public organizations should be encouraged to take training in preretirement counseling.

RECOMMENDATION XXI

We urge that institutions of higher learning provide opportunities for special professional preparation of those who will and are working with older persons (law, medicine, social work, home economics, recreation, education, etc.) More attention must also be given to workshops, institutes, and inservice education for those who now work with older adults.

A. Administration Response

1. See Administration Response to Recommendation XIX.

B. Response of Study Panel

The panel recognizes that the Administration has made a substantial response to meet the need for professional training for men and women who will be working with older persons. However, the Administration's recent decision to discontinue AOA training programs, effective June 30, 1974, is a matter of considerable concern to the Panel members. The Administration has not mentioned any emphasis on training people from minority groups. In line with the response to Recommendation I, the Study Panel urges that due consideration be given this priority. This would be particularly applicable to serving the non-English speaking.

The provision for the annual appraisal of manpower needs in the whole field of aging contained in the Amendments to the Older Americans Act is very basic and should be undertaken at the earliest opportunity.

There is a need to have professional organizations establish professional standards by which a candidate's qualification for positions in the field of aging can be judged. The purpose would be to assure that any person seeking a position of responsibility in programs serving the elderly would have academic work in social gerontology, social work, clinical psychology, etc.

Institutions for higher learning should be encouraged to establish interdepartmental committees on aging to review what is being done in their institutions, what relevant courses are being offered, and what research is underway. Neighboring colleges and universities might plan how they could pool their resources to offer jointly sponsored programs.

RECOMMENDATION XXII

To implement the educational policies growing out of the 1971 White House Conference on Aging, the Administration on Aging must be accorded status and financing appropriate to the task and must be made an independent agency within the Department of Health, Education, and Welfare as provided for in the Older Americans Act of 1965.

A. Administration Response

1. "The Administration on Aging has been moved to the Office of the Secretary of Health, Education and Welfare within the Office of the Assistant Secretary for Human Development."
2. "Programs authorized under Title III of the 1965 Older Americans Act are a primary mechanism for services to help the elderly remain in their homes. To strengthen these service programs, the President has:
 - Proposed increasing the budget for Federal support of nutrition programs and Title III projects to \$200 million.
 - Asked the Congress to extend the Older Americans Act indefinitely.
 - Submitted amendments to the Congress to strengthen the Older Americans Act in order to further assure the independence of older persons."

B. Response of Study Panel

The move of the Administration on Aging to the Office of the Secretary within the Office of the Assistant Secretary for Human Development is a step forward in meeting the recommendation. This move should result in better coordination of programs in the field of aging. However, to fully meet the thrust of the recommendation, the Administration on Aging should now be given independent status within the Office of the Secretary of HEW, rather than reporting through the Office of the Assistant Secretary for Human Development.

RECOMMENDATION XXIII

Primary responsibility for the initiation, support, and conduct of education programs for older persons must be vested in the existing educational system, Federal, State, and local, with active participation and cooperation of specialized agencies. A Division of Education for Aging should be established in the Office of Education immediately, to initiate supportive educational services for the aging. Similarly, all State Departments of Education should designate full-time responsibility to key staff for the development and implementation of programs in education for aging.

A. Administration Response

No response.

B. Response of Study Panel

Throughout its analyses of the Administration's responses to these recommendations, the Study Panel has expressed its concern that no substantial progress will be made toward providing educational opportunities for the older people in the nation until the U.S. Office of Education and State education offices grant continuing education support similar to that given to vocational education. Until this recommendation is implemented with the establishment of a Division of Education for Aging, and the designation of full-time responsibility to key staff in State departments of education, little progress can be realistically expected toward accomplishing most of the recommendations formulated by the section on Education.

It is the Study Panel's position that no substantial progress toward providing educational opportunities for older Americans will be made until funds are made available to the U.S. and State Offices of Education for purposes of providing leadership and support.

The Panel believes that it is significant that there is no Administration Response to Recommendation XXIII.

EMPLOYMENT AND RETIREMENT

Study Panel Report

EMPLOYMENT

Preamble

Efforts on behalf of the elderly in the area of Employment and Retirement were significantly accelerated by the Administration in early response to the recommendations of the White House Conference on Aging, but implementation of many of these recommendations has been jeopardized, postponed or rejected by the Administration.

We believe that enactment of the 1973 amendments to the Older Americans Act, passed by the Congress on April 18 in a form reportedly acceptable to the Administration, represents a milestone in achievement of Conference objectives for expanded employment opportunities for the elderly. Title IX of this legislation establishes on a permanent basis the Older Americans Community Service Employment program to promote useful part-time work opportunities in community service activities for the low-income elderly. Acceptance by the Administration of this important categorical program is enthusiastically endorsed.

Full implementation of Conference recommendations, however, awaits a number of other actions.

The recommendation relating to public service employment would require not only that the Emergency Employment Act be continued but that older people have an opportunity to participate in the program in proportions consistent with their unemployment.

Furthermore, to expand employment opportunities for middle-aged and older workers would require the establishment of the Mid-Career Development Service program that was eliminated from the 1973 Older Americans Act amendments. We therefore urge that this program be enacted promptly as separate legislation or that the basic thrust of this proposal be incorporated in comprehensive manpower legislation.

The study group senses a reluctance on the part of the Administration to attune manpower programs to older people in general and especially to the special needs of Indians, Blacks, the Spanish speaking and other minorities.

Furthermore, in the many instances in which the Administration did not respond directly to the Conference recommendations, we sense a rejection by the Administration, and therefore urge that definitive action consistent with the recommendations be taken.

The Conference recommendations placed heavy emphasis on special employment programs for the elderly and on earmarking of funds for them. The first recommendation of the Section included the statement that "Experience proves that adequate funds

must be earmarked to improve employment opportunities for older workers." Furthermore, the Section Report Preamble warned: "Their problems cannot be met adequately at the State and local level or through the financial instrument of revenue sharing. Strong Federal leadership and financing are required." All evidence to date strongly suggests that middle aged and older workers are likely to continue to be overlooked or largely ignored under Revenue Sharing.

The Study Panel recognizes that older people and their spokesmen organizations also have an important responsibility in carrying forward the recommendations of the White House Conference. While the specific comments that follow are focused on the Administration's responses, we recognize full well the responsibility that older people have in demonstrating their experience and employment ability and in conveying this message to the Administration, the Congress and the general public. If older people are to get a fair deal in relation to revenue sharing, for example, they and their spokesmen must play an aggressive role in staking out their claims, with the Federal government serving as their strong and wholehearted advocate.

RECOMMENDATION I

Larger and Earmarked Manpower Funds--The Nation's present manpower programs fail to take adequate account of the unemployment problems of older people. Experience proves that adequate funds must be earmarked to improve employment opportunities for older workers.

In order to achieve a more equitable distribution of services to all age groups, Federal, State and local manpower programs should expand their services and provide more job recruitment, training, counseling, and placement services for older workers.

It is imperative that adequate funds based on population ratio, needs, and special circumstances be earmarked for special employment programs for older people. Aggressive efforts should be made to monitor effectively the use of such earmarked funds.

A. Administration Response

1. "This Administration is opening up employment opportunities for older workers by--
 - The President has demonstrated his determination to help those over 65 by doubling the amount of money for manpower programs for older workers.
 - The President also directed the Secretary of Labor to urge States and communities to hire persons over 65 under the Emergency Employment Act, a temporary two-year program to hire about 150,000 people each year in public services.
 - In addition, the President asked the Labor Department to work with public employment offices to open job opportunities for those over 65, including part-time job opportunities, both in the public and private sectors.
 - The Office of Economic Opportunity, through its Senior Opportunities and Services (SOS) programs also is carried forward a manpower program to enable the elderly to earn more income.

--The Administration on Aging has issued regulations for the new Nutrition for the Elderly Program which provide, as called for in the law, for employment preference for persons 60 and over."

2. "This Administration believes that local governments should give full consideration to the use of available Federal funds, e.g., the Older Americans Act, the Adult Services titles of the Social Security Act and General Revenue Sharing to help older persons continue to be involved in society either through employment or voluntary service."
3. "The Administration supports the use of model project funds by the Administration on Aging (in conjunction with the Department of Labor) for demonstrations in manpower training for older persons."

B. Response of Study Panel

The Administration should be commended for its efforts in immediate response to the Conference Recommendations in doubling the funds for the Mainstream pilot projects for older workers. The Panel is pleased that the Administration and Congress have agreed to legislate and implement the Senior Community Service Employment programs of the Older Americans Act of 1973.

The Study Panel would call attention to the first recommendation of the section that included the statement that "Experience proves that adequate funds must be earmarked to improve employment opportunities for older workers."

Unfortunately, one of the manpower amendments - "The Middle Aged and Older Worker Training Act" - has been omitted. The Study Panel urges that this provision be enacted promptly as separate legislation or that the basic thrust of this proposal be incorporated in comprehensive manpower legislation subsequently enacted by Congress.

In setting up these programs procedures should be outlined for reporting and for monitoring; reports should be made available to the public.

While we agree that every effort should be made to see that funds available under the Adult Services provisions and Revenue Sharing are used to help in the employment of older people, such efforts cannot be expected to produce the same results as earmarked funds.

The Administration's response with regard to the Emergency Employment Act -- again with a questionable future -- and State Employment offices is in terms of "encouragement" (of questionable effectiveness in actuality) whereas the recommendation from the White House Conference on Aging was directed toward expansion of effort through "earmarking" or specifically designating money for manpower programs for older workers. The Labor Department should give emphasis to hiring older workers similar to the efforts exerted for veterans. Administration action must be taken to benefit employment of older veterans.

For older Indians, Blacks, Spanish speaking and other groups who have particular difficulties in obtaining employment, special counseling and placement efforts should be exerted not only so that they may have employment during the regular working years, but also so that they may have better social security benefits when they retire. Additionally, the Study Panel recommends that efforts be made to provide direct funding to Indian Reservations.

RECOMMENDATION II

Immediate Steps to End Discrimination---
 We now have legislation designed to eliminate discrimination in employment on account of age. But there is question as to whether this legislation is vigorously enforced and as to whether further efforts are needed to expand employment opportunities for older workers.

Federal, State and local governments should strictly enforce protective and anti-discriminatory laws and policies regarding employment opportunities, with the elimination of the age limit of 65 in age discrimination legislation. The age discrimination act of 1967 should be expanded to cover all employees in both private and public sectors.

There should be a governmentally sponsored public relations and educational effort designed to induce employers voluntarily to hire more older workers.

A. Administration Response

1. "This Administration is moving to eliminate age discrimination in employment by --
 - Action has also been taken to end age bias in employment through enforcement activities and conciliation. Where voluntary compliance has not succeeded, enforcement actions have been taken.
 - The President followed up his commitment to eliminate age discrimination with transmittal by the Secretary of Labor to Congress of legislation to extend the Age Discrimination in Employment Act to employees of State and local governments.
 - As an essential part of Age Discrimination in Employment Act (ADEA) compliance effort, the CUE (Compliance Utilizing Education) program has been initiated.

During the past Fiscal Year, press releases and non-technical bulletins concerning the Age Discrimination in Employment Act (ADEA) were widely distributed. Other Administration activities to combat job bias have included television and radio announcements, production of a half-hour public service film about age discrimination, and sponsorship of a series of age discrimination conferences."

B. Response of Study Panel

The response from the Administration indicates that some steps have been taken to implement the recommendation for strict enforcement of the present Act. The Administration must, however, enlarge its efforts in enforcing the Age Discrimination in Employment Act, and should report periodically on its progress on solving the problems of older workers.

The Study Panel finds no response to the recommendation for eliminating the age limit of 65. It recommends that the Administration see that Legislation is introduced.

The Administration is called upon to see that Legislation is again sponsored which would extend ADEA to employees of State and local governments.

It appears extremely worthwhile to have an education campaign to dispel the reluctance to hiring older workers like the "Hire the Handicapped" Campaigns. The many highly successful experiences from Operation Mainstream, Green Thumb, and Senior Aides should be reported to the public. Another vehicle for public information would be through the National Alliance of Businessmen which works with the Department of Labor JOBS (Job Opportunities in the Business Sector). The panel urges that the JOBS program be explored as an additional manpower vehicle for providing jobs for older workers through special incentives to employers and possible earmarking of job training positions.

RECOMMENDATION III

Public Service Employment---Even improved manpower policies may not result in adequate opportunities for those persons willing and able to work. State and local governments are hard pressed to finance the public services that are so badly needed by our communities today and that are so appropriate for the employment of older people.

It is the responsibility of the government to assume the role of "employer of last resort" to provide meaningful and socially needed employment opportunities for those older workers willing and able to work, if all other programs fail to produce such results.

A minority favored expanded and innovative programs to meet employment need of older persons, but questioned the concept of government serving as "employer of last resort."

A. Administration Response

1. See also #1, #3 under Recommendation I.
2. "The Administration strongly endorses conviction of delegates that opportunities for employment and voluntary service in all sectors of society must be made available to Older Americans."

B. Response of Study Panel

The Study Panel applauds the enactment of the 1973 Older Americans Act Amendments, and specifically Title IX with its opportunities for employment for older workers with limited employment prospects.

As another channel for expanding employment opportunities for Older Workers, the Study Panel urges that the Emergency Employment Act be continued and older workers participate in the program reasonably consistent with their proportion of the total unemployment of the United States. In carrying out the Emergency Employment Act, Administration encouragement is not enough; strong, tough affirmative action must be taken. Public reports of proportions of older workers in EEA programs in relation to unemployed older workers should be periodically published.

Where beneficial and appropriate, preference should be given to older people in programs serving the elderly such as is required by the regulations for the nutrition projects.

RECOMMENDATION IV

A Flexible Retirement Age--Our society presently equates employability with chronological age rather than with ability to perform the job.

Chronological age should not be the sole criterion for retirement. A flexible policy should be adopted based upon the worker's desires and needs and upon his physical and mental capacity. Policies and programs that provide employment opportunities after age 65 must be made available.

Realistic opportunities for retirement earlier than age 65 must be provided. Employers should be encouraged to adopt flexible policies, such as gradual or trial retirement.

A. Administration Response

"The Administration believes that organizations that have retirement policies requiring a worker to leave the job at a specified age should examine them to determine whether they are still serving a useful purpose and should be willing, when found appropriate, to experiment with or adopt alternative arrangements.

Mandatory retirement policies were often established to assure a worker's right to retirement. Experience under these policies has been mixed. They have the advantage of facilitating retirement planning and they avoid arbitrary application of a policy to individuals within an organization. Some organizations, however, have found it inconvenient to part with still-talented people at the prescribed time; and some workers resent having been forced from the job in accordance with the calendar rather than with their wishes or capacity.

The Federal Civil Service System now incorporates substantial flexibility on retirement age. The System provides for retirement at a variety of combinations of age and service (55 years of age/30 years of service; 60 years of age/20 years of service; 62 years of age/5 years of service; mandatory retirement at age 70 or above in combination with 15 years of service). The practical effect of these provisions is to give many Federal employees a choice of retiring whenever they wish between the ages of 55 and 70; even more have a choice between the ages of 60 and 70; and almost all have a choice between the ages of 62 and 70 or beyond. Moreover, the mandatory retirement provision in the System is considerably more liberal than mandatory retirement provisions in most private systems (typically age 65), or in many other public systems.

Several Departments operate programs of one year trial retirements for those who might like to retire early but lack confidence concerning their ability to make the necessary adjustments. This program aims to keep open the option to return to work should adjustment fail."

B. Response of Study Panel

Since the Administration "believes" that organizations that have mandatory retirement policies should examine these policies, it is suggested that the Administration initiate an affirmative action program which would more strongly encourage this review. It is hoped that the positive experience derived from special programs such as Green Thumb as well as less formal arrangements would encourage employers who have found their older workers to be productive and reliable to drop the mandatory retirement age.

It is appropriate that Federal government through regulations set by the Civil Service Commission should set an example. However, Federal employees are a small percentage of the total work force so efforts on many levels by many groups, public and private, will be necessary before the substance of this recommendation is adopted widely.

RECOMMENDATION V

The Need For New Policies---Existing policies fail to protect the worker who is forced to retire prematurely or who is unprotected by a pension plan.

New national policies and publicly and privately supported programs are needed to help workers who are forced to retire before the normal retirement age because of health problems or job displacement caused by technological changes or jobs requiring early-age retirement. New programs should be vested generally in existing agencies that have responsibility for dealing with these problems.

There should be created a continuously funded program by the Federal Government especially designed to maintain economic security for middle-aged and older workers during their period of transition from prematurely forced disemployment into suitable employment or retirement. During this period, a major objective would be to retrain and educate the disemployed to assure reemployability or to assist in mobilizing resources to assure a meaningful retirement.

All workers should be guaranteed a retirement income adequate to maintain a decent standard of living above the poverty level. Legislation must be enacted as soon as possible requiring early vesting, adequate funding and portability of pensions and to provide for federal insurance for pensions.

A. Administration Response

1. "Department of Labor is assisting middle-aged and older workers in their transition from forced job displacement into suitable jobs or retirement."

2. "Provision has been made for a national income floor for older persons -- an action which the President first recommended to the Congress in 1969.

The Social Security Amendments of 1972 include provisions which will replace the present Old Age Assistance program with a Federally financed program of Supplemental Security Income which will provide a guaranteed minimum monthly income of \$130 for an individual and \$195 a month for a couple."

3. "Incomes of older persons have been dramatically increased over a three-year period through existing income assistance programs.

By the end of 1972, three major Social Security increases will have taken effect since January 1970. Benefit payments as of the end of 1973 will be some \$25 billion more than they were at the end of 1969. The compound effect of the 15, 10, and 20 percent increases approved during this Administration is a 51.8 percent increase since 1969, representing the greatest rate of increases in Social Security since 1950."

4. "Besides the improvements in Social Security benefits, progress has also been made in improving the income position of retired military pensioned veterans, and retired Federal employees. Retirement benefits of Federal employees have been liberalized and have increased over 26 percent in the last 4 years. For veterans on pensions, increases averaging 16 percent have gone into effect since January 1971. This Administration is also seeking to improve military retirement benefits by recomputing retirement pay, as the retiree reaches normal retirement age, on the basis of January 1971 pay scales."
5. "On July 1, 1972 the President signed legislation to make Social Security benefits "inflation proof" through a cost-of-living escalator."
6. "The President has proposed the following five point program for strengthening and encouraging the growth of the private retirement system and protecting the pension rights of workers from loss caused by changing jobs or mismanagement of pension plan funds.

--Tax deductions to encourage independent savings toward retirement.

--Requiring the vesting of pensions.

--More generous tax deductions for pension contributions by self-employed persons.

--The Employee Benefits Protection Act.

--A study of pension plan terminations."

B. Response of Study Panel

The Department of Labor must step up its training and employment programs for workers facing premature retirement. Funds must be earmarked specifically for older workers and especially for those minorities represented by Special Concerns groups. The establishment of a Midcareer Development Service Program is recognized as a most important action in fulfilling the purpose of this recommendation. The Older Americans Comprehensive Services Amendments of 1973 eliminate this employment program. The Study Panel urges that this important Middle Age and Older Workers Training Act be enacted promptly as separate legislation or that the basic thrust of this proposal be incorporated in comprehensive manpower legislation subsequently enacted by Congress.

The Department of Labor should expand assistance to middle-aged and older workers on their transition from forced job displacement into suitable jobs and/or retirement particularly as expertise is developed in counseling for these problems.

The recent 20% increase in Social Security benefits and the cost of living escalator provisions move in the direction of substantially improving the income position of millions of older people. The Federal government is urged to undertake research so that the concept of "a decent standard of living in retirement" can be defined with sophisticated economic indicator measures. Specifically some definitions should be derived which relate retirement income to previous earnings and to current wage levels.

Legislation should be enacted at the earliest opportunity to implement the recommendation for pension improvements. We urge that pension reform be made truly meaningful through provisions for reinsurance when companies relocate, plants shut down, pension plans fail or companies merge, and through vesting rules which will not discourage employers from hiring the older workers. To this end, we urge that legislation (and specifically the Williams-Javits Bill reported out by the Senate Labor and Public Welfare Committee in March 1973), not be diluted or scuttled through such diversionary tactics as referral to other committees of the Congress.

RECOMMENDATION VI

Preretirement Preparation---Too many individuals fail to plan for retirement or plan too late.

Preretirement education and counseling should be provided locally throughout the nation by trained instructors, starting at least five years before normal retirement age. Information on problems and opportunities involved in retirement should be included in family living and other pertinent courses at all educational levels.

Government at all levels, employers, unions, and educational institutions (especially through adult education agencies and the use of television) should encourage and promote preretirement counseling by trained instructors. Special courses for those nearing retirement are urgently needed.

A. Administration Response

1. "The Administration believes that pre-retirement education should become an integral part of the personnel policies of employers in both the public and private sectors. Major emphasis should be placed on preparation for continued involvement in the life of society subsequent to retirement."
2. "The Departments and agencies of the Federal Government will be urged to set an example for other employers by initiating or strengthening pre-retirement programs under the leadership of the U. S. Civil Service Commission."
3. "The Administration will support the use of funds by the Administration on Aging to conduct, in coordination with the Office of Education, model projects for pre-retirement education."
4. "The Departments of Labor and Commerce will provide leadership designed to add significantly to the numbers of employers who provide pre-retirement education for their employees."
5. "The Administration on Aging, in cooperation with the Office of Education, will develop materials designed to identify the roles that educational institutions at all levels are equipped to perform in the field of pre-retirement education."

B. Response of Study Panel

The Administration's responses to this recommendation are constructive if implemented as outlined. The panel urges that adequate funds and staff be made available so all these activities can be pursued vigorously. It is hoped particularly that the Administration on Aging with the U. S. Office of Education will move as fast as possible to conduct model projects for pre-retirement education, and when sufficient experience is derived from the model projects, will encourage widespread use of the materials and techniques developed. Enactment of legislative proposals such as the Federal Employees Pre-Retirement Assistance Act could provide valuable materials for use in pre-retirement education.

RECOMMENDATION VII

Social Security Retirement Test--The earnings test that results in withholding of Social Security benefits constitutes a financial hardship for older people.

The Retirement Test should allow persons to receive Social Security benefits without reduction up to the point where the total of social security plus earnings equals \$5,000/yr. In no case should benefits be reduced for persons earning under \$1,680.

A. Administration Response

1. "On October 30, the President signed H.R. 1 (P.L. 92-603), a comprehensive Social Security bill containing the following provisions which will have a major impact on the incomes of older Americans.

--An increase in widow's and widower's benefits....

--A liberalization of the earnings test...which increases to \$2,100 the amount a Social Security beneficiary can earn in 1973 and later years without having payments reduced. This recent legislation provides that the exempt amount will be automatically increased in the future to keep pace with increases in average wages covered under Social Security. In addition, benefits will be reduced by \$1 for each \$2 earned above \$2,100 no matter how high the earnings might be so that there will be no dollar-for-dollar reduction in benefits as now occurs with respect to earnings above \$2,880. This assures that the more a Social Security beneficiary earns, the more spendable income he will have."

B. Response of Study Panel

The members of the Study Panel favor the recent liberalization of the retirement test in P. L. 92-603. However, the Recommendation (VII) above was for a different and more innovative approach. We urge that the Administration study the recommendation as stated above and provide its views for public discussion.

RECOMMENDATION VIII

Social Security Benefits --- An immediate 25 percent increase in Social Security benefits was recommended, with a \$150 minimum per month, to be financed, in part, by general revenues.

A. Administration Response

1. See #3 under Recommendation V.
2. "The Social Security system is an income program that relates payments to earnings. It is a self-supporting system that is financed by payments made by the employee and the employer. The Administration believes that general revenues should be used to establish a national income floor for the elderly poor."

B. Response of Study Panel

The 20% increase in combination with other improvements, such as the special minimum benefits for workers with long years of service at low wages, comes close to fulfilling the recommendation. The panel responds with emphasis because the provisions of P.L. 92-603 will especially benefit some of the most disadvantaged people, including widows as well as agricultural, domestic and other low-paid workers.

The panel is disappointed in the Administration's unwillingness to consider use of general revenues to alleviate the burden put on workers through the heavy and regressive social security payroll tax. Use of general revenues would seem particularly appropriate in financing the excess cost of the special minimums beyond contributions paid by these workers and their employers.

RECOMMENDATION IX

A major overriding problem connected with the administration of employment and retirement policies is the lack of fixed responsibility by any single agency and lack of coordination by any single agency.

The President should establish an Office on Aging within his Executive Office by Executive order until Congress amends the Older Americans Act of 1965 to create a Department of Aging at cabinet level status. In addition, there shall be appointed an Assistant Secretary of Labor for Older Workers until a Department of Aging is established.

A. Administration Response

1. "The President created the Domestic Council Cabinet-level Committee on Aging to respond to the needs of the elderly at the very highest level of government."
2. "The Administration on Aging has been moved to the Office of the Secretary of Health, Education, and Welfare within the Office of the Assistant Secretary for Human Development."
3. "At the White House Conference on Aging, the President announced that he was establishing the position of Special Consultant to the President on Aging."
4. "As a result of action suggested by the Domestic Council Committee on Aging, the President will send a memorandum to each Department or Agency with responsibility for programs in the field of aging calling for the designation of a person to coordinate programs for older persons across departmental lines. This individual will report directly to the Secretary or agency head on these matters."

B. Response of Study Panel

The Study Panel is pleased by the Administrative action of upgrading the focal point of aging in the Federal government and by the enacting of the legislation confirming this action. We hope that the President will accord his Special Assistant on Aging, Special Consultant on Aging, and the Domestic Council's Committee on Aging as much status and visibility as possible.

The Study Panel does not believe that the President's proposed action, calling for the designation of a person in each department who will report to the Secretary or agency head and has responsibility for programs in the field of aging to coordinate programs for older persons across departmental lines, is sufficient although it could perhaps be a useful mechanism. The creation of the position of an Assistant Secretary of Labor is needed to give the problems of the older worker and the retired person high level visibility.

RECOMMENDATION X

A national pension commission with a governing board of management, labor, and public representatives should be established to study ways of encouraging the expansion and the improvement of private and public pension plans with particular reference to: flexible retirement ages, liberal (early) vesting and portability, adequate funding, more general coverage, job redesign, and Federal insurance of pensions.

A. Administration Response

1. See #6 under Recommendation V.

B. Response of Study Panel

The study panel feels that the Administration has not recognized the seriousness of the problem to which the recommendation is directed. As an immediate step toward solving the very grave problems in the existing pension system, we urge the immediate implementation of this recommendation.

It is certainly to the advantage of the public good if private pension plans are strengthened because workers who are deprived of benefits are then likely to have to turn to the government for various forms of aid.

RECOMMENDATION XI

A national "job bank" should be computerized by the Department of Labor to meet employer requirements. The "job bank" now being computerized should include job opportunities for retirees (including those in rural and small communities) who should be encouraged to register with the U.S. Employment Service.

A. Administration Response

1. No response.

B. Response of Study Panel

The most feasible part of this recommendation for immediate implementation would be a media campaign similar to ads for Job Corps, VISTA, etc., to encourage retirees to register at the U.S. Employment Service. Information on the U.S. Employment Service might also be included in preretirement counseling programs. The campaign recommended by the Delegates to encourage employers to hire more older workers should be developed to gain more listings in the job bank. Although the panel prefers that jobs not be designated "for older workers," it is hoped that employers could design more flexible working arrangements for retired workers returning to the work force.

RECOMMENDATION XII

The Federal Government shall develop a program for, and provide financing for, the establishment of local centers for the purpose of locating and bringing together older persons and potential employers on both a full-time and part-time basis. Federal funds will be channeled through the various state administrations on aging who will be responsible for approving applications for the establishment and financing of such centers by public and private agencies, and the supervision of their operation.

For the dual purpose of promoting job opportunities for elderly workers and meeting a crucial need for help in the private homes of other elderly persons, Federal funding for employment programs through public or voluntary agencies should offer counseling, training, and placement for "companions for elderly persons living in private homes."

A. Administration Response

1. See #2 under Recommendation I.

B. Response of Study Panel

It would seem that there would be many creative ways in which the job market could be enlarged for the retired worker. This recommendation suggests one mechanism for creating that market where retired or older workers ready to seek jobs meet with employers having jobs. All approaches that give promise of bringing prospective employers and employees together, for example, job fairs, should be explored.

Title III of the 1973 Older Americans Act amendments which provided for model projects to concentrate on the special problems of the elderly, including the need for public service opportunities for low-income older persons, held promise for helping older persons find meaningful work. The basic thrust of the provision of Title III as legislation should be passed by the Congress and approved by the President.

Title III of the 1972 Older Americans Act amendments which provided for model projects to concentrate on the special problems of the elderly, included the need for public service opportunities for low-income older persons, and thus held promise for helping older persons to find meaningful work. As enacted in 1973, the amendments make no mention of employment opportunities as an area of special consideration under model projects. The study panel recommends that whenever possible under model projects, processes should be included addressed to employment of the elderly.

Green Thumb, Senior Aides and other Operation Mainstream programs have demonstrated the satisfaction and benefit of having older people gainfully occupied. It is felt that particular benefit would be derived both by the served and the server through programs under which the elderly serve the elderly in their own homes. There are also important economic advantages through avoidance of unnecessary expensive institutionalization.

RECOMMENDATION XIII

For the Mariana Islands, a study should be made of the aged and how to alleviate their problems, especially of employment. A vocational instructor in a workshop to train older persons in nature crafts for sale to tourists is needed.

A. Administration Response

1. No response.

B. Response of Study Panel

It is the understanding of the panel that there are PEP and Operation Mainstream programs in Guam. If these programs have not been widely extended throughout the Trust Territory of the Pacific and specifically to the Mariana Islands, we would urge such expansion. The Panel particularly underscores the part of the recommendation concerning the development of nature crafts. It would be hoped that the handicrafts of the Mariana Islanders could be displayed widely in the continental United States.

RECOMMENDATION XIV

For all minorities, rural residents, migrants, and employees of small business Congress should enact a compulsory, universal and national portable pension plan administered through Social Security, (with tax advantages for the employer and the self-employed) to provide for those not normally covered by other pension plans.

A. Administration Response

1. See Section #6 under Recommendation V.

B. Response of Study Panel

The Administration should undertake immediately an action-directed study of the feasibility of the proposal contained in the recommendation and the best method for its implementation. The recommendation is directed to a real need by agricultural workers and others not likely to be covered by an expansion of the existing private pension system, and the Administration should not ignore their plight.

RECOMMENDATION XV

Employers should be required to supplement pension or retirement income plans with retirement counseling programs, such counseling programs to be submitted to the Internal Revenue Service at the time the pension program is submitted. Both program content and costs for counseling programs would be a part of the total pension package that requires the approval of the Internal Revenue Service.

A. Administration Response

1. See #1 under Recommendation IV.

B. Response of Study Panel

The Administration should conduct a study of the ways in which retirement counseling could be instituted either by employers or through other means so all employees throughout the country could obtain adequate preretirement counseling. The Study Panel would recommend that after approval by IRS, the implementation be assigned to the Department of Labor.

RECOMMENDATION XVI

It is recommended that the Federal Government and particularly the President encourage and support legislation which would exempt from current Federal taxation employee contributions to retirement funds and provide increased tax incentives to employers (particularly small employers) to establish and maintain adequate retirement plans.

A. Administration Response

1. See #6 under Recommendation V.

B. Response of Study Panel

The recommendation would appear to be directed at compulsory employee contributions to private pensions plans. Therefore, it is felt that the President's proposal which concerns voluntary contributions is not responsive, and we urge that the Administration react to this recommendation.

The recommendation is intended to provide incentives to expand and improve the benefits from pension plans. The Administration's proposal is limited to the self employed, and so falls short of meeting the purpose of the recommendation. We, therefore, again ask for serious consideration of this recommendation and a direct response.

RECOMMENDATION XVII

It is recommended that each of the fifty States hold a White House Conference on Aging at least every 4 years in their respective States. It is further recommended that a White House Conference on Aging be held in Washington, D. C., every 4 years, 18 months before Presidential elections, so that senior citizens can make each President accountable for senior citizens' program. It is further recommended that funds for the White House Conference on Aging come from Federal general revenue funds.

A. Administration Response

1. No response.

B. Response of Study Panel

It would seem very important that subsequent meetings dealing with problems of the older population be held so that the momentum generated by the 1971 White House Conference on Aging will not dissipate. Periodic conferences based on the White House model would be useful for sharing the experience and progress generated by the many programs for the elderly now underway. Such meetings would identify new problems and the needs for new priorities.

FACILITIES, PROGRAMS, AND SERVICES

-63-

(64=blank)

Study Panel Report
FACILITIES, PROGRAMS, AND SERVICES

Preamble

The Study Panel which examined the Administration and Congressional Legislation responses to recommendations of the White House Conference on Aging stressed the fact that the recommendations were drawn under several handicaps and must, therefore, be viewed with flexibility.

The Study Panel has four comments which are relevant to the current level of action and broadly relate to securing more action in the future. In the first place, we need increased effort to secure implementation at the Federal level of existing law. For example, homemaker aide services could have been available for older persons throughout the country if full advantage had been taken in carrying out existing legislation.

In the second place, any newly enacted legislation should be broad-gauged so as to permit and indeed encourage comprehensive service programs rather than the fragmented approach to legislation providing for "bits and pieces."

In the third place, the newly amended social service regulations (4/26/73) of the Social and Rehabilitation Service, DHEW, are so restrictive that they will reduce rather than expand the present scope and availability of public assistance social services to the aging. They will need thorough revision, focused on implementing the recommendations of the Section on Facilities and Programs, and Services, if older adults are to receive essential services.

In the fourth place, if services to the aged are to be spearheaded through offices on aging rather than through the agencies that so far have been funded, there must be better bridges from planning to action. It does little good to spin wheels planning for services if one has no resources either within the agency or through the cooperation of other agencies for implementing those services.

RECOMMENDATION I

Tax funds should be more equitably allocated to maximize the likelihood that older persons will continue to live independently and to help assure that older persons will have a choice of living arrangements. To achieve this, a full range of supportive community services, public and private, must be adequately financed. Public funds must be allocated in sufficient magnitude to assure such quality institutional care, from minimal to maximal, as may be needed at various stages in an older person's life. The level and quality of care and services shall be provided without regard to source of payment.

A. Administration Response

1. "The Administration is prepared to work with States, local communities and the private sector in a new effort to bring into existence comprehensive coordinated service programs for older persons at the community level. These programs should be designed to enable older persons to maintain their independence by remaining in their own homes or other places of residence."
2. "The Administration believes that the Federal, State or local financial resources that are available provide a significant opportunity to increase the number of communities with comprehensive and coordinated service programs for older persons. Federal financing can be made available through a combination of significant programs, namely: (1) the Older Americans Act; (2) the Adult Services provision of the Social Security Act; (3) General Revenue Sharing. In addition, Allied Services legislation is under consideration in HEW which would assist Governors in developing the capacities in State and local governments, as well as in private non-profit agencies to plan integrated service programs that are more responsive to the needs of families and individuals, including the elderly."
3. "President Nixon has submitted a plan to the Congress for strengthening and expanding service delivery programs under the Older Americans Act."

- Proposed increasing the budget for Federal support of nutrition programs and Title III projects to \$200 million.
 - Asked the Congress to extend the Older Americans Act indefinitely.
 - Submitted amendments to the Congress to strengthen the Older Americans Act in order to further assure the independence of older persons."
4. "Under the Adult Services provisions of the Social Security Act, the Federal government, within a ceiling for each State related to an overall national ceiling of \$2.5 billion, provides funds to pay 75 percent of the cost of services that enable older persons receiving public assistance to remain in their homes or return to their residence after hospitalization."
 5. "Under General Revenue Sharing, substantial sums could be used by both State and local governments to support coordinated and comprehensive service programs for older persons."
 6. "The Department of Health, Education and Welfare, presently has under consideration Allied Services legislation for transmission to Congress. The objective of such legislation would be to assist integrated planning and delivery of human resource programs."
 7. "The Social Security Amendments of 1972 included a number of provisions which should contribute substantially to the independence of older persons and to their ability to live in their own homes."
 8. "The Veterans Administration continues to develop new techniques to help older persons remain independent in their own homes or other places of residence."
 9. "A National Health Service Corps has been established which would demonstrate the feasibility of providing health services to the elderly in many inner city and remote rural areas currently lacking professional medical assistance."
 10. "The Administration has spearheaded a national voluntary effort in a program to help older men and women in 300 communities live dignified lives in the familiar settings of their own homes."
 11. "The Department of Housing and Urban Development is funding demonstration programs to improve tenant services provided by local communities to older residents in public housing."
 12. "Tax relief is being provided to households taking care of dependent elderly persons who are incapable of taking care of themselves."

B. Response of Study Panel

Recent increases in appropriations under the Older Americans Act indicate progress towards equitable allocation of tax funds to better provide opportunities for the elderly to live independent lives. Revenue sharing legislation facilitates the availability of funds for the elderly but does not contain provisions to assure that the funds are being spent for the elderly. The omission of guidelines to assure equitable allocation of funds for the elderly is of concern to the Panel.

RECOMMENDATION II

Services to older people should be provided through a combination of governmental, private non-profit and commercial agencies. The Federal Government should be responsible for financing a minimum floor for all services. These services may be procured from private non-profit and/or commercial sources at the election of local and State governments.

A. Administration Response

1. See #1,2 under Recommendation I.
2. "The Administration agrees with the delegates to the White House Conference that the non-government sector should be involved with government in the planning and implementation of programs for older persons."
3. "The Administration has proposed amendments to the Older Americans Act which would actively involve voluntary agencies in the establishment of comprehensive and coordinated systems for the delivery of social and nutritional services."
4. "The Secretary of Health, Education and Welfare has issued regulations under the new Nutrition Program for the Elderly which are designed to assure, in accordance with the law, that nutrition projects are established and administered with the advice of persons competent in the field of nutrition, of older persons who themselves will participate in the program, and of persons who are knowledgeable with regard to the needs of older persons."
5. "The President, in submitting the re-organization plan to Congress, which resulted in the creation of ACTION, stated in his Message that the new agency would explore innovative ways of utilizing volunteer services."
6. "The initiation of Project FIND in the summer of 1972 exemplifies the commitment of the Administration to facilitate the involvement of the non-government sector in programs for older persons."

B. Response of Study Panel

Amendments to the Older Americans Act called for greater coordination among Federal agencies, and between the Federal government and other sectors. Provisions contained in the Nutrition Program allow for greater participation by the private non-profit and commercial sectors.

It is essential that Federal standards continue to be developed which are applicable to the full range of Federally funded services, and that a floor be established for such services.

RECOMMENDATION III

Primary responsibility for planning and coordination of health, welfare and other services for the older population should be placed in a public service agency with divisions at the Federal, State, and local level with strong administrative authority and funding controls and the capability of functioning across departmental lines. There should be extensive involvement of older people and independent agencies and organizations in the making of policies and in all aspects of planning.

A. Administration Response

1. "The President created the Domestic Council Cabinet-level Committee on Aging to respond to the needs of the elderly at the very highest level of government."
 2. "The Administration on Aging has been moved to the Office of the Secretary of Health, Education and Welfare within the Office of the Assistant Secretary for Human Development."
 3. "Upon taking office, the President appointed the Commissioner on Aging to serve as his Special Assistant on Aging."
 4. "At the White House Conference on Aging, the President announced that he was establishing the position of Special Consultant to the President on Aging."
 5. "As a result of action suggested by the Domestic Council Committee on Aging, the President will send a memorandum to each Department or Agency with responsibility for programs in the field of aging calling for the designation of a person to coordinate programs for older persons across departmental lines. This individual will report directly to the Secretary or agency head on these matters."
- "The Secretary of Housing and Urban Development appointed such an official and, in addition, called for the designation of a similar position in each of the Department's major program areas, and in each of the regional offices."

6. "The Secretary of Health, Education and Welfare has taken steps both to expand and to strengthen the Advisory Committee on Older Americans which was established by the Older Americans Act to advise the Secretary on all Departmental matters relating to older persons."

"The Secretary has specified that the Commissioner on Aging shall, in his capacity as Chairman of the Committee, report directly to him. In addition, a former Undersecretary of Health, Education and Welfare has been designated as the Executive Vice Chairman of the Committee, and the Committee has been provided with its own staff director and supporting staff."

7. "The Undersecretaries' Group acting on a recommendation of the Cabinet-level Committee on Aging, has specified that each Federal Regional Council should establish a committee on aging in order to accelerate the development of comprehensive and coordinated programs for the delivery of services to older persons at the community level."

"These committees will consist of representatives from the appropriate Federal Regional offices. Six out of ten Regional Councils have already initiated action in this direction."

8. See #2, 4 under Recommendation II.
9. "Both prior to and since the White House Conference on Aging, the Chairman of the Conference has consulted with the Washington representatives of the national organizations of older persons."
10. "In addition, the Chairman has also met on two occasions with field representatives of these organizations in connection with meeting he has held in the headquarters cities of the ten Federal regions. With a combined membership of over six million older persons, these organizations have had and will have an important impact on new approaches to issues in the field of aging, and on the effective utilization of existing authorities and resources."

B. Response of Study Panel

Although there has been no response to the concept of central public service agencies, Administrative actions have indicated an awareness of the need to provide a central focal point for the coordination and planning of services as has been reflected by a number of Administrative actions. The role of the Domestic Council Committee on Aging, the activities of the President's Special Consultant on Aging, and the expansion and strengthening of the Older Americans Advisory Committee all are direct actions by the Administration to give horizontal and vertical coordination to service delivery, and to include the elderly in decision making processes. Regulations for the nutrition program also expand opportunities for elderly involvement in both policy formulation and operations.

RECOMMENDATION IV

All age groups should be involved in the determination of policies and standards for facilities and services for the older population, and older persons themselves certainly must have a role.

A. Administration Response

1. See #6 and #8-10 under Recommendation III.

B. Response of Study Panel

We commend the action taken to date by the Administration to implement this recommendation but we urge that comparable action be taken to guarantee the involvement of older adults in all other Federal facilities, programs, and services for this age group. We urge that comparable action be taken to guarantee the involvement of all age groups, as the recommendation specifically states, as well as older persons. The methods already in use within the Department of Health, Education, and Welfare are appropriate for these and other programs both within that Department and other Departments of the Federal government.

We urge adequate staffing and prompt and full utilization of the potential of the Advisory Committee on Older Americans.

RECOMMENDATION V

Qualifications other than age should be the determining factors in staff employment in facilities and programs for the elderly, but special effort should be made to use older persons in staffing such facilities and programs.

A. Administration Response

1. "The Administration strongly endorses the conviction of the Conference delegates that opportunities for employment and voluntary service in all sectors of society must be made available for older Americans."
2. "The regulations for the new Nutrition for the Elderly Program provide, as called for in the law, for employment preference for persons 60 and over."
3. "The Office of Economic Opportunity, through its Senior Opportunities and Services (SOS) programs also carried forward a manpower program to enable the elderly to earn more income."
4. "The Office of Education and the Inter-Agency Council on the Arts and Crafts are working on a five-year plan to help the elderly fill their leisure time with creative activities."

"Under this program, craft centers would be established at State and regional levels where both the young and the elderly could be instructed in traditional arts and crafts. Senior citizens would be employed as teachers, thus assuring not only enrichment of their own lives, but guaranteeing that traditional skills will be passed along to future generations."

"Planning is also underway for establishment of a National Academy for the Arts and Crafts where gifted senior craftspeople could instruct youth in the centuries-old skills centered in the Appalachians, as well as in the Spanish and Indian cultures."
5. "The Administration has taken steps to improve coordination among the many non-Federal volunteer activities which affect the aging."

"The Administration on Aging has enlisted the cooperation of the National Center for Voluntary Action to provide staff assistance to 138 national voluntary or organizations committed

to improving in-home services for older persons in at least 300 communities. These services can oftentimes be rendered most effectively by older persons."

6. "The Administration believes that legal services should be included as part of a comprehensive and coordinated service program for older persons as they are developed at the community level."

"In the development of these legal service programs, consideration should be given to the use of older persons both as lawyers and as assistants to the members of the legal profession."

7. "The Administration on Aging made a grant to the National Paralegal Institute of Washington, D.C. for preparing a curriculum to train older persons as paralegal assistants for work in neighborhood legal centers. It is expected that the curriculum will be used in community and junior colleges so that paralegal personnel can be trained throughout the country."

B. Response of Study Panel

The regulations issued for the Nutrition Program contain provisions that, when implemented, will assure the elimination of age as a criteria for staff employment in programs for the elderly. Some additional strengthening of this concept has been realized by actual and proposed increases in funding for manpower programs for older workers. However, there is a need to expand efforts by the Secretary of Labor to get communities to hire persons over 65.

RECOMMENDATION VI

Older persons should be served by an integrated system, sharing equitably with other age groups those facilities, programs, and services suitable and appropriate to the needs of the general population, but they should also have the benefit of specialized facilities, programs, and services based on their distinctive needs.

A. Administration Response

1. See #'s 1 and 2 under Recommendation I.
2. Those coordinated and comprehensive programs should be designed to:
 - a. "Give full consideration to the use of available Federal funds, e.g., the Older Americans Act, the Adult Services titles of the Social Security Act and General Revenue Sharing to help older persons continue to be involved in society either through employment or voluntary service."
 - b. "Use (of) the Administration on Aging model project funds to inaugurate, in coordination with the Office of Education, demonstration projects designed to establish continuing education projects for older persons."
 - c. "Give full consideration to the use of available Federal funds -- e.g., the Older Americans Act, the Adult Services titles of the Social Security Act, General Revenue Sharing and the proposed Better Communities Act -- to make Senior Centers and the services provided through them available to a greater percentage of older persons."
 - d. See #6 under Recommendation V.
 - e. "Encourage local communities to utilize Federal resources that are now or will be available in such a manner as to include mental health services in coordinated and comprehensive programs for older persons."

- f. "Encourage local communities to include in their coordinated services systems programs: (1) to assist in the rehabilitation of the elderly handicapped; (2) to help the elderly handicapped remain in their own homes or other places of residence; and (3) to provide the elderly handicapped with opportunities for continued involvement in life through volunteer activities."
3. "The Administration has committed attention and resources to special housing design needs of older Americans and will maintain its concern in this area."
 4. "The Administration will pursue a policy of encouraging States, local school districts and institutions of higher learning, where appropriate, to utilize a larger proportion of Federal funds allocated to them, including vocational and adult education funds, to provide older persons with educational opportunities."
 5. "The Assistant Secretary for Education will personally urge State chief school officers to give more consideration to the needs of older persons in the formulation of programs which utilize Federal resources."
 6. "The Urban Mass Transportation Administration within the Department of Transportation has issued new guidelines for applicants for capital grants which require that the transit plan submitted with applications include consideration of the service needs of the elderly."
 7. "The Federal Highway Administration is encouraging States to include specific aids for the elderly and handicapped in all rest areas and tourist facilities."
 8. "Airlines and operators of air terminals are cooperating with the Federal Aviation Administration to meet the unique problems of the aged in this area of public transportation."
 9. "The Administration agrees with the conviction of the Conference Delegates that greater emphasis should be given to the establishment of community level facilities to provide services for the elderly."
 10. "The Administration agrees with the Conference delegates that all levels of governments should expand consumer protection and education -- especially in regard to the unique problems of the elderly."
 11. "The President asked Congress for the full authorization of \$100 million to implement the Nutrition Program for the Elderly (Title VII of the Older Americans Act)."

B. Response of Study Panel

Evidence of integrating services for the elderly with other service systems, while recognizing the special needs of the elderly, indicate a growing interest at all levels to provide access and facilitate the involvement of the elderly in service programs. While no specific act has evolved to realize the objective of this recommendation, the variety of efforts in a wide range of agencies indicate growing interest to use available funds, legislation and resources to include the elderly's needs in the broader program objectives. The lack of comprehensive service programs for all age groups, however, will make it difficult to meet all the needs of the elderly in this fashion.

We recognize, however, that in the administration of comprehensive service programs, considerably more attention must be paid by the responsible agency to assure fair and equitable participation and provide for recourse where inequities exist.

RECOMMENDATION VII

Government controls as a primary means for assuring consumer protection should be substantially augmented by the participation of consumers, industry, business, and the professions.

A. Administration Response

1. "The Administration agrees with the Conference delegates that all levels of governments should expand consumer protection and education - especially in regard to the unique problems of the elderly."
2. "The Office of Consumer Affairs has encouraged food-chain stores to take positive action in the areas of unit pricing, nutritional labeling, and open dating."

"Under the direction of the President, the Office of Consumer Affairs has, for many months, been urging food chains to initiate unit pricing in their outlets. It can now be reported that most of the large and medium sized chain food stores have voluntarily adopted unit pricing. Several states and cities have enacted tough legislation in this area."

"Likewise, at the urging of the Office of Consumer Affairs, manufacturers and retailers may adopt standard nutritional labeling and open date (i.e., date when a commodity should no longer be offered for sale). A study on the feasibility of requiring open dating is underway in the Department of Health, Education and Welfare."

B. Response of Study Panel

Overall reaction: The group understood the recommendation to mean that while government should be the primary measure and means of protecting the consumer, other segments of society have cooperative and independent roles. The group felt that government should assist in preparing and enabling those other segments to participate, and should exhibit leadership in terms of motivating these other segments: the consumer, business and industry and the professions.

Thus far, the response to this recommendation in several specific areas has been of modest proportions, such as:

- programs of consumer education
- the encouragement of voluntary nutritional labeling
- the development of consumer educational materials

The National Business Council for Consumer Affairs publications indicate the beginning of participation by business. However, the overall participation of consumers, business, industry, and the professions with government in the development and enforcement of controls has been scattered and fragmentary to date.

RECOMMENDATION VIII

A central consumer agency should be established at the Federal level to better coordinate and strengthen the powers and responsibilities of existing Federal agencies engaged in protecting the interests of elderly consumers.

A. Administration Response

1. "The President has strengthened consumer advocacy at the Federal level by:
 - a. Creating an Office of Consumer Affairs in the Department of Health Education and Welfare with a mandate to intensify efforts on behalf of the consumer with special emphasis on programs to assist the older consumer.
 - b. Appointing the Director of the Office of Consumer Affairs to the Domestic Council Committee on Aging.
 - c. Appointing the Director of the Office of Consumer Affairs a full member of the Cost of Living Council, the Cabinet-level body which sets the policies for the wage-price stabilization program."
2. "On October 27, 1972 the President signed the "Consumer Product Safety Act" which contained many of the proposals featured in the Administration's Bill. This bill will establish a new Consumer Product Safety Commission with authority to ban hazardous consumer products which cannot be made reasonably safe by development of standards."

B. Response of Study Panel

The designation of the Office of Consumer Affairs, previously located in the Executive Office of the President, preceded the White House Conference on Aging by several months and represented a substantial initiative by the President. The transfer of the Office of Consumer Affairs to the Department of Health, Education and Welfare provides even greater opportunity to coordinate consumer problems with other aspects of problems facing the elderly. The identification of a Special Assistant in the Office of Consumer Affairs with primary responsibility for the concerns of the elderly consumer is important in terms of recognizing that special consumer problems do exist for the elderly.

RECOMMENDATION IX

Older persons shall be free to manage their own affairs. Should public intervention be needed, due to hazardous circumstances or situations in which they may be involved, there must be full protection of their legal rights as individuals. There should be development of protective services for those older persons in the community who are unable to manage their affairs because their mental and/or physical functioning is seriously impaired.

A. Administration Response

1. "The Administration agrees...that the provision of legal services, law enforcement, and the protection of the civil rights of the elderly are essential to assuring the independence and dignity of older persons."

2. "The Administration will shortly propose legislation to establish a legal services corporation."

"In his Human Resources Message, of March 1, 1973, the President stated: "The time has come to institutionalize legal services as a permanent, responsible and responsive component of the American system of justice. I shall soon propose legislation to the Congress to form a Legal Services Corporation constituted so as to permit its attorneys to practice according to the highest professional standards, provided with safeguards against politicization of its activities and held accountable to the people through appropriate monetary and evaluation procedures."

"In the development of the proposal for submission to Congress and its implementation upon enactment, consideration will be given to the needs of older persons."

3. See #6 under Recommendation V. Also...."As pointed up in other parts of the report, major attention must be focused on the development of comprehensive and coordinated services for older persons at the community level. Such "service packages" can be financed by the use of a combination of funds from both the public and private sectors at the local level, from State funds, and from Federal funds including those under the Older Americans Act, the Adult Services provisions of the Social Security Act and General Revenue Sharing"

"It is important that legal services be included in these packages of services. In this manner, help can be given older persons in the protection of person and property to which they are entitled under the laws of the land. Special emphasis can and should be placed on the protection of their civil liberties."

D. Response of Study Panel

While the Administration states its support for guaranteeing the rights of the elderly to manage their own affairs, specific action has not been indicated. The efforts of the OEO legal services, which has been active in providing legal assistance to and protecting the rights of the elderly will, under anticipated legislation, be transferred to a legal services corporation. The Panel wishes to emphasize that, as part of the responsibility undertaken by this corporation to assist elderly persons in managing their own affairs, emphasis be placed upon safeguarding the civil rights of those persons.

RECOMMENDATION X

Age alone may be an appropriate criterion in establishing policy for certain programs, such as eligibility for Social Security retirement benefits and property tax relief. It is an inappropriate criterion when used to discriminate against the elderly in determining eligibility for insurance, employment, and credit, for example. Any criterion based solely on age should be analyzed to determine whether it is appropriate for a particular age.

A. Administration Response

1. "The Administration believes that organizations that have retirement policies requiring a worker to leave the job at a specified age should examine them to determine whether they are still serving a useful purpose and should be willing, when found appropriate, to experiment with or adopt alternative arrangements."
2. "This Administration strongly endorses the conviction that opportunities for employment and voluntary service in all sectors of society must be made available for older Americans."
3. "The President followed up his commitment to eliminate age discrimination with transmittal by the Secretary of DOL to Congress of legislation to extend the Age Discrimination in Employment Act to employees of State and local governments."
4. "The Administration concurs...that all levels of government must review their laws and policies to prevent application of licensing and insurance procedures in such a manner as to jeopardize the mobility of the elderly."

B. Response of Study Panel

Whereas both the Administration and Congress have expressed a desire to eliminate discrimination resulting from age and have taken some meaningful action, it is felt that eligibility for program participation should be based on individual assessment appropriate to all ages and not on specific chronological age. A stronger affirmation of this belief is required of the Administration. This could be accomplished through private and public organizational mechanisms to disseminate information regarding ways of overcoming discrimination, for example, through the district offices of the Social Security Administration.

RECOMMENDATION XI

Federal legislation shall provide minimum quality standards and guidelines to provide uniform services and care for the elderly in all Federally administered programs and in Grant-in-Aid programs offered to the States, supplemented by legislation on the State and local levels conforming to such standards, and guidelines. Such standards and guidelines shall clearly specify requirements regarding staff qualifications and training and the quality of facilities, programs, and services.

A. Administration Response

1. "The Department of Housing and Urban Development is revising and improving its standards for the minimum acceptable level of planning, construction and materials for all Departmental insured housing programs."

"These proposed revisions have been circulated to many groups and specialists for review and comment. Cultural and ethnic considerations will continue to be part of housing design and environmental development. To better understand these and other varied needs of the elderly, HUD is consulting with groups and individuals encompassing a wide variety of disciplines and is working closely with the Administration on Aging in the area of research."

2. "The President has launched and followed-up on a vigorous program to assure that nursing home patients get the kind and quality of care they need and deserve, and this included action to -- cut off of Federal funds to sub-standard nursing homes."
3. "Proposed regulations governing Intermediate Care Facilities under Medicaid have been published for public comment."

"Intermediate Care Facilities provide health related care and services to those who do not need care in skilled nursing homes, but require institutional care beyond room and board."

"When the new regulations are promulgated, they will provide Federal standards for care provided for Medicaid patients in Intermediate Care Facilities. The new standards will be a valuable tool in the President's determination to upgrade the quality of long term care. The standards will cover physical facilities (e.g., Life Safety Code) and certain

health and rehabilitative services. In addition, the new regulations will apply to all eligible public institutions for the mentally retarded providing for minimum levels of care and treatment of this population."

4. See #7, 8 under Recommendation VI.
5. "The President has further encouraged the National Highway Traffic Safety Administration to establish drivers license standards which States must adopt to be eligible for Federal funding under the Highway Safety Act of 1966."
6. "The Administration has taken several actions to protect elderly consumers in the area of nutrition standards."

"Nutrition standards are of special concern to the elderly since an adequate diet is essential to maintaining good health."

"The President has signed into law and requested \$100,000,000 to fund the Nutrition Program for the Elderly (Title VII Older Americans Act). The Administration on Aging has developed program guidelines which set forth minimum nutrition standards for local projects sponsored under the program. This is to insure that consumers receive meals that meet their particular dietary needs and meet their nutritional requirements."

B. Response of Study Panel

Guidelines governing the conduct of the Nutrition Program and proposed standards for Intermediate Care Facilities are illustrative of some action which can be pointed to as progress toward the goal of providing uniform standards. However, cut-backs in staff resources and training and staff development funds have halted progress in achieving uniform standards and grant-in-aid service programs. Without adequately trained personnel, the quality and uniformity of services deteriorates seriously.

The Study Panel is concerned that the very existence of several of the most important grant-in-aid programs has been threatened. The continuation of those programs which train the elderly and others for service roles is vital to the effectiveness of programs of service and care to the elderly.

While Congress has passed legislation to support such training, Administration actions have deterred and adversely affected the possibility of national standards of performance by state, local and private sector program participants.

RECOMMENDATION XII

Government funded legal service shall be available to older persons in all communities. To ensure this:

- 1. The Federal Government should earmark adequate funds so that older persons will have a guaranteed full range of legal services, including advocacy, administrative reform, litigation, and legislation. The funds provided should be a fair proportion of all legal service funding.*
- 2. Bar associations, private law firms, law schools, and university research institutes should be encouraged to provide legal assistance and research findings to older persons.*
- 3. Lay people and older paraprofessionals should be used to perform advocacy roles that advance the legal concerns of older people.*
- 4. Congress should establish an independent legal service corporation, in which older persons will have a fair share of direction, that will provide free services for those who cannot afford them (including rights and property of older homeowners), will charge a reasonable fee for those persons whose incomes permit a modest payment, and whose services will be accessible wherever older people live.*
- 5. Funds should be made available for research into the legal problems of older persons.*

A. Administration Response

1. See #1,2, and 3 of Recommendation IX.
2. See #7 under Recommendation V.
3. "The Law Enforcement Assistance Administration is moving to reduce crime -- particularly for residents of public housing-- and to pinpoint the crimes experienced most often by older persons.
 - a. The Law Enforcement Assistance Administration sponsors a number of programs geared broadly to reduce crime, including block grants to the States, and discretionary and research projects.
 - b. The Law Enforcement Assistance Administration has approved ten discretionary grants to localities totaling more than \$1.1 million in Federal funds to increase internal security in housing projects.
 - c. The Law Enforcement Assistance Administration is also sponsoring a number of housing security research projects through the National Institute of Law Enforcement and Criminal Justice.
 - d. The Law Enforcement Assistance Administration and the Department of Housing and Urban Development are cooperating in an interagency effort to deal with security problems in public housing projects.
 - e. The Law Enforcement Assistance Administration is presently conducting a nationwide survey to pinpoint crimes experienced most often by persons 65 years of age or older."

B. Response of Study Panel

XII-1

No evidence of specific earmarking of legal services funds for older citizens is found except in the creation of a Backup Center. However, planning for the development of specific programs and for legal service components of comprehensive service programs could, if undertaken, lead to implementation of this Recommendation. Through such programs supportive services which increase access to legal services such as counselling and referral, transportation assistance, and advocacy and assistance in preparing for legal services can be provided. Even though a portion of funds can be earmarked for legal assistance to the elderly, care must be taken that it be recognized as essential in the implementation of other supportive services.

XII-2

This question is handled under XII-1 and 5. We believe that the Administration has made a partial response to this recommendation.

XIII-3

In addition to promoting the use of the new curriculum, the Administration on Aging should encourage the recruitment of retired and older attorneys to train volunteers and paid personnel to assist in delivery of legal services. To significantly improve legal services available to them requires adequate training and supervisory support and care.

XII-4

The Study Panel urges the Administration to accelerate the time-table for transmittal of its proposal to the Congress.

XII-5

A very significant contribution has been made by the existing OEO Backup Centers in other areas of legal research. By participating in a national network of legal services delivery, such backup centers are able to gather a wide variety of experience and exposure and have a considerable educational and advocacy impact on local legal services programs. If the newly created center for the legal problems of the aging is consistent with this pattern, it would represent a major response. Private law schools should be funded in this same area to provide a necessary academic research component and to provide the base for special courses.

RECOMMENDATION XIII

While the need for greatly expanded facilities, programs, and services is urgent, services are not a substitute for sufficient income to maintain independent living in dignity and health. Older persons require no less than the moderate standard of living defined by the Bureau of Labor Statistics and no limit should be placed on earnings of Social Security beneficiaries.

A. Administration Response

1. "The Administration is firmly committed to insuring an adequate income for older Americans. This commitment is based on the President's conviction that "the best way to help people in need is not by having Government provide them with a vast array of bureaucratic services, but by providing them money so they can secure needed services themselves.

While the Administration does not believe that the Nation should settle for the status quo, it does believe that important steps have been taken recently with respect to the area of income for older persons.

The Administration does not concur in the recommendations of the delegates to the Conference that the "Intermediate" budget developed by the Bureau of Labor Statistics become the national goal in this area. This budget is only one of three patterns, namely, lower, intermediate and higher, which are illustrative of the way elderly couples could spend their incomes. In developing the three family budget groupings, the Bureau of Labor Statistics studies assume that the elderly couple has the following characteristics: a husband and wife, both age 65 or over, living in their own home, both in reasonably good health, and able to take care of themselves. They assume further that a couple with a lower budget relies more heavily on public transportation and free recreational facilities in the community than a family with an intermediate or higher budget. These assumptions permit the Bureau of Labor Statistics to make statistical estimates but do not mirror the actual circumstances of a large number of the elderly.

Therefore, while these studies are interesting and useful in their own right, they provide no basis for knowing whether any particular level of income is "adequate" under varying sets of circumstances.

It is clear from this analysis that further work is required before a satisfactory definition of "adequate" income can be developed. The Department of Health, Education, and Welfare has initiated studies which will be utilized by an inter-agency task force of the Human Resources Committee of the Domestic Council that will be established immediately to come to grips with this issue.

As we move toward the goal of an adequate income for older Americans, we must endeavor to make sure that older Americans receive a fair share of the benefits which will accrue to our society as a result of increased productivity."

2. "Provision has been made for a national income floor for older persons--an action which the President first recommended to the Congress in 1969."
3. "Incomes of older persons have been dramatically increased over a three-year period through existing income assistance programs."
 "By the end of 1972, three major Social Security increases will have taken effect since January 1970. Benefit payments as of the end of 1973 will be some \$25 billion more than they were at the end of 1969. The compound effect of the 15, 10, and 20 percent increases approved during this Administration."
4. "On July 1, 1972 the President signed legislation to make Social Security benefits "inflation-proof" through a cost of-living escalator."

B. Response of Study Panel

The cumulative effect of recent Social Security benefits, and the Supplemental Security Income (which provides a national income floor) have increased discretionary income for the elderly, but falls short of the recommended BLS-defined standard of living income. The provisions in H.R. 1 that call for Social Security increases to keep pace with the cost of living will go far to assure that elderly income keeps relative pace with other income groups. Because a nationally-accepted standard of living income is still required, the Administration is urged to announce a specific time table for its task force to report.

RECOMMENDATION XIV

Police protection of the elderly should become a top priority. A portion of Federal funds for the prevention of crime allocated to the States or local communities should be earmarked for this purpose. Particular attention should be paid to the needs of minority groups.

A. Administration Response

1. See #3 under Recommendation XII.

B. Response of Study Panel

The Administration's response emphasizes crime prevention and lacks mention of compensating the victims of crime.

The Recommendation mandates the earmarking of funds to non-Federal governmental agencies, and to that extent it is a very specific one. There are a few examples of general expenditures in the area of crime prevention which will benefit the elderly to the extent that they, for example, live in public housing, but this does not constitute "earmarking", nor does it represent a response to the needs of minority groups.

RECOMMENDATION XV

Involvement between young people and older people should be encouraged at all levels of community life. Young people can gain knowledge of the process of aging and become involved with elderly people through the education system, national youth organizations, and volunteer roles.

A. Administration Response

1. [The Administration has asked for an expansion of the Foster Grandparent Program which]...."would build on [its] successful experience....under the Foster Grandparent Program, older Americans, 60 years and older, are helping children with exceptional needs in hospitals, correctional institutions and other residential facilities for needy children. If the legislation proposed by the Administration is enacted, older volunteers could serve children with exceptional needs in other than institutional settings. The proposed legislation also would give older volunteers the opportunity to serve other older persons with special needs."
2. See #4 under Recommendation V.
3. "Providing opportunities for interaction between the young and older adults.

Both the religious and educational communities are in a position to open up far more opportunities for interaction than are currently available. It has been demonstrated that when such opportunities are opened up, young persons very quickly adopt new attitudes toward older persons and despair in the lives of older persons is often replaced with hope.

The Federal Government is taking action in this area by:

- a. Encouraging, through the Extension Service Offices of the Department of Agriculture, the strengthening of programs to recruit and train both young and older volunteers for service to older persons and to provide companionship.
- b. Exploring, with the National Center for Voluntary Action, ways to expand "Adopt a Grandparent" programs at the local level.

- c. Strengthening and enlarging programs such as the Foster Grandparents and the Retired Senior Volunteers. Similar emphasis is being placed on opening up opportunities for interaction between the young and old in programs such as Vista and the Peace Corps."

B. Response of Study Panel

The need to create more opportunities for young-old interaction still exists. Multi-generational programs, supported by Federal funds do not specifically encourage or recommend interaction by different age groups. Programs such as Foster Grandparents and certain limited educational programs to allow young-old involvement but are exceptions to the general rule.

Agressive efforts to recruit young persons in programs designed for the elderly should be undertaken.

New high school and college credits are being given to young people for community services but the program needs to be expanded. Emphasis for youth-aging interaction should be encouraged in all public school systems through the training of youth ombudsmen for the aging.

Several examples of programs to involve young and old exist, but the need for national programs still exists.

Provisions in the Older Americans Act (Title III) can serve as a stimulus for realizing the objectives of this recommendation, thus making enactment and signing of the legislation even more essential.

RECOMMENDATION XVI

A policy affecting the elderly will only be useful if it is written clearly, is publicized broadly, and is completely understandable by persons with differing cultural and linguistic backgrounds. For example, the Social Security Administration could enclose with the monthly check notification of entitlements and programs available to beneficiaries.

A. Administration Response

1. "The Administration has been working to improve communications between the Federal Government and older Americans and to alert the Government to areas of special need."
2. "The President directed the Social Security Administration offices to expand their information and referral services for the elderly.

Each of the 959 Social Security offices -- constituting the field network distributed throughout the Nation -- is required to maintain a resource file of all community services, as well as information about State, county, and Federal programs. The Social Security Administration also has 3,500 sub-district contact stations.

With respect to Federal programs, each Social Security district office has been supplied with the "Catalog of Federal Domestic Assistance," and has been instructed regarding its use."

3. "The President directed the Domestic Council Committee on Aging to examine ways in which to use other Government offices -- such as the General Services Administration's Federal Information Centers and the Agriculture Cooperative Extension Service's local offices -- in further expanding and improving information and referral services.

The Administration on Aging with the cooperation of the Social Security Administration and Office of Economic Opportunity is conducting a statewide research and demonstration program in Wisconsin to test various information and referral sites, including four Social Security Offices, in terms of their effectiveness in meeting the needs of older persons.

The office of Education's Bureau of Libraries and Learning Resources has funded research and demonstration projects in two branch libraries in five metropolitan areas -- Atlanta, Cleveland, Detroit, Houston, and Queens Borough -- to test the relevance of libraries as information centers in neighborhoods."

4. "The President launched Project FIND -- a major out-reach effort to identify older Americans who are "lost to society."

B. Response to Study Panel

Even though implementation steps by both the Administration and the Congress sound appropriate, too many older adults are still not made aware of their entitlements, or the procedures are so complex that they cannot take full advantage of them. Moreover, a uniform Federal provision for informing older adults of all their entitlements has not yet been developed by all agencies with programs directed toward older adults. Therefore, all agencies should be mandated to issue clear information, both written and oral, concerning their programs in the language of the recipient. Such information should be widely disseminated and carefully monitored to check on the effectiveness of aging supports in this regard.

RECOMMENDATION XVII

Delegates from every part of our Nation call upon the President to end the United States involvement in the war in Southeast Asia. We are acutely aware of the human costs resulting from that tragic war including war-related spiralling inflation and the unfortunate waste of our resources in so-called defense appropriations. We declare urgently and simply: The War Must Stop!

A. Administration Response

No response.

B. Response of Study Panel

Response no longer needed.

RECOMMENDATION XVIII

The White House Conference on Aging should establish a continuing body of Delegates to make recommendations for State and Federal legislation as part of the post-Conference action year.

A. Administration Response

"This Administration shares the concern -- that the momentum achieved through the conference process should be maintained."

1. "As directed by the President, a Post Conference Board of the WHCoA has been created."
2. "At its first meeting, the Post Conference Board adopted a resolution to create a series of Study Panels paralleling the major topics discussed at the Conference.

These study panels are now at work studying the actions taken by the Federal Government, State and local Governments, and private organizations to implement the Conference recommendations. Reports from the study panels, analyzing action taken to date and offering strategies designed to bring about further action will be considered by the full Board at a meeting on April 27 and 28, 1973, and the results of their deliberations will be issued as soon thereafter as possible."

B. Response of Study Panel

A plan of action which will ensure continued action on behalf of American's elderly is needed so that the momentum generated to date will not be lost,

RECOMMENDATION XIX

It is recommended that:

1. *There be established immediately a Federal Department of Elder Affairs to be headed by a Secretary of Elder Affairs who shall be a member of the President's Cabinet. Such Department shall be broadly responsible for the planning, coordination, and funding of health, welfare, and other services for older people.*
2. *From the date of establishment, there shall be a two-year period in which the Secretary shall prepare the plan for the transfer of appropriate operating functions from other Federal agencies.*
3. *During this period, the Administration on Aging should be immediately strengthened in order that its original functions as provided in the Older Americans Act of 1965 to be more effectively realized.*

A. Administration Response

1. See #1-7 under Recommendation III.
2. "The above actions reflect the Administration's concurrence with the prevailing view of the delegates to the Conference, namely, that more effective coordination of Federal programs which affect older persons is the direction in which to move. This is preferable to creating a separate aging agency to which all such Federal programs could be transferred."

B. Response of Study Panel

The Administration has opted to coordinate Federal programs at the top through policy control and to disregard the recommendation to establish a Federal Department on Elderly Affairs. Other steps to centralize, such as those of the Domestic Council Committee on Aging will further the cause of coherent planning, coordination and funding, but lack the force that might be felt from a single Agency. Granted that it is possible to do more for the elderly by having specific programs in the various existing agencies and departments, but the trend away from categorical to block grants offers nothing in lieu of coordination of categorical grant programs.

Strengthening the Administration on Aging, and raising its visibility in the Department of Health, Education and Welfare will help efforts in the interim to plan for and carry out the functions envisioned by the proposed new Department.

RECOMMENDATION XX

We older Americans, and representatives of older Americans, meeting in Washington, D.C., at the invitation of the President, have studied proposals, programs, schemes, and strategies to make life for older Americans more than simply bearable.

However, we are of one mind when we declare the primary need of older Americans--in truth, of all Americans--is adequate income. We ask for action now from The White House to increase Social Security benefits to a level at which people may live in dignity; specifically, we recommend a benefit level of at least \$3,000 per year for an individual and \$4,500 for a married couple.

A. Administration Response

1. See #1, #2, #3, and #4 under Recommendation XIII.

B. Response of Study Panel

Tying Social Security payments to a cost of living factor is commended as a major step in the effort to achieve economic security for many older Americans.

The approval of HR 1 represents another major response to the Recommendation, yet the goal of an adequate income base under the Social Security system has been only partially achieved.

RECOMMENDATION XXI

Although they are United States citizens and contributors to the Social Security Trust Fund through payroll deductions, certain residents of Puerto Rico, Guam and the Virgin Islands are ineligible to receive OASDI benefits under the Prouty Amendment. This discriminatory treatment should be changed so that benefits are available to them on the same basis as they are to other persons.

A. Administration Response

1. "Some of the specific recommendations made by minority groups are now being studied by the Social Security Administration as recommended by the delegates to the Income Section." Such as:
2. "...extension of special benefits for persons 72 years and over to residents of the Commonwealth of Puerto Rico, Samoa, the Virgin Islands, and Guam."

B. Response of Study Panel

Owing to the special circumstances of the residents in those areas, a prescribed time table for submitting the recommendations of the Study group should be established.

RECOMMENDATION XXII

In every community and neighborhood, as appropriate, there should be a multi-purpose senior center to provide basic social services, as well as link all older persons to appropriate sources of help, including home-delivered services.

These basic services, in clearly identifiable sites, i.e., senior centers, action centers, departments of social services, etc., financed as an on-going government program, could be the foundation for such additional services as various levels of government and the voluntary sector, including organizations of the aged, would desire and sponsor.

Basic social services that would enhance the ability of the elderly to retain independence should be made available. These may include but are not necessarily limited to:

- 1. Supportive services which aid the older person to remain in his familiar environment or to retain his usual living arrangement when this is no longer possible through his own efforts. Specific services would include homemaker-house-keeping services, organized home care, chore services, home meal services, and escort services.*
- 2. Preventive services which prevent the breakdown of the capacity of the older person to function physiologically, psychologically, or socially through detection and through social intervention prior to old age or prior to a crisis in old age.*

3. *Protective services which protect the civil rights and personal welfare of older persons from neglect and exploitation by relatives, friends, the aged individual himself, and the community. Services would be directed toward the older persons with limited mental functioning due to mental deterioration, emotional disturbance, or extreme infirmity and would focus on their inability to manage their own affairs in such areas as providing for personal and physical needs, planning and decision-making and handling of finances.*

Maximum involvement of the elderly in policy-making, staff and volunteer roles, should be encouraged.

A. Administration Response

1. "The Administration agrees with the conviction of the delegates to the Conference that greater emphasis should be given to establishment of community-level facilities to provide services for the elderly."
2. "The Administration encourages local communities to use existing funds (OAA, SSA Adult Services Programs, General Revenue Sharing, and Proposed Better Communities Act) to make service centers, and services they provide available to a greater percentage of older persons."
3. "HUD community development programs that previously supported service centers are being terminated and are being replaced by the Better Communities Act."
4. "Until the New Better Communities Act is legislated, the Administration will continue to honor commitments already made out of undisbursed obligated balances."
5. See #'s 1-12 under Recommendation I.
6. See #'s 2-6 under Recommendation II.

B. Response of Study Panel

The Study Panel endorses the importance of the concept of multi-purpose senior centers. States and local communities are urged to establish and expand senior centers. Further, the Panel urges the Federal government to offer financial incentives, including support for staff resources to encourage the establishment of senior centers and the extension of other services they offer to a greater number of older persons. Such incentives might take into consideration the per capita income of the area.

RECOMMENDATION XXIII

States are urged to fully implement the service provisions of Titles I and XVI of the Social Security Act.

It is inconsistent to acknowledge the need for greatly expanded social services for adults under the Social Security Act, and then propose to foreclose this possibility by limiting funding under Welfare Reform. Therefore, it is recommended that funding of social services remain open-ended.

A. Administration Response

1. See #'s 2 and 4 under Recommendation I.

B. Response of Study Panel

We urge that all States take full advantage of the potentials for services to older adults in the \$2.5 billion authorization for services, on a 75-25 percent matching ratio. We further urge that localities take immediate action to ensure that services to the aged are adequately funded through equitable use of the new revenue sharing provisions.

Regretably, Federal legislation has closed the open-ended appropriation for social services provided under the Social Security Act and we recommend a return to open-ended appropriations for the elderly as national policy, but with sufficient controls by the administering agency.

RECOMMENDATION XXIV

Procedures and arrangements for the certification and distribution of food stamps and commodities should be convenient and protect the dignity of individuals utilizing the programs.

A. Administration Response

1. "The Department of Agriculture revised food stamp eligibility requirements and expanded food assistance programs so that now virtually every county in the Nation offers some form of food assistance to the elderly.

Reforms have been made in the Food Stamp and commodity distribution programs of the Department of Agriculture. National eligibility standards have been set for food stamp eligibility, and benefits are increased to keep pace with the cost of living.

In early 1969 the annual bonus for a single person with an income of \$1,200 was \$72 and for an elderly couple with an income of \$1,800 the annual bonus ranged from \$120 to \$144. By 1972 these annual bonus benefits increased to \$216 and \$336 respectively.

Virtually every county in the Nation now offers either the Food Stamp or the Food Distribution Program; in early 1969 nearly 500 counties offered neither. In all, 2.5 million older Americans benefit from at least one of these programs. Recently the Department of Agriculture has sponsored the Drive to Serve Program. There are many elderly persons who are eligible to receive donated foods, but because of illness, disability or transportation problems, they are unable to get to the distribution centers. Through the cooperative efforts of the Department, State and local welfare authorities, and adult and high school volunteers, Drive to Serve provides a delivery system of foods to these senior citizens in many communities.

Home delivered meals (Meals-on-Wheels) may be purchased with Food Stamps by handicapped, elderly persons who are unable to prepare their own meals. Also, donated foods are available to non-profit, tax-exempt institutions which provide home delivered meals to the extent of the

needy served who are not using stamps to pay for meals. Also included in the Food Stamp Program are free food stamps for the extremely poor. Several publications have been translated into Spanish for use and distribution by community outreach workers when they meet with potential recipients."

B. Response of Study Panel

We feel that consideration should be given to restoring eligibility for food stamps for those elderly receiving benefits under the new Supplemental Security Income. If they are restored, the action taken should be along the lines outlined in Recommendation XXIV.

RECOMMENDATION XXV

Restrictive Federal and State public assistance laws and regulations which in effect deny benefits and services to otherwise eligible older people should be abolished. It is recommended that: (1) public assistance benefits be based on need without regard to residence or citizenship; (2) minimum standards for benefits should be set at the Federally defined poverty level; (3) a simple declaration of need should be the basis for determining eligibility; and (4) both lien laws and relative responsibility provisions should be abolished.

A. Administration Response

1. "The Administration believes that the time has come to assure an income floor for older people. On October 30, 1972, the President signed H.R. 1 (P.L. 92-603) which included provision for an income floor for older persons through a Federal Supplemental Security Income program based on need, which will supplement income from such sources as Social Security, private pensions and employment."

[These amendments will]....

2. "Establish a national income floor for an estimated 4.6 million older persons. This will be an increase of approximately 2.5 million over those now covered by the Federal-State public assistance program."
3. "Apply uniform national eligibility standards."
4. "Provide for eligibility standards which eliminate the practice of placing liens on homes and provide that eligibility will be determined without regard to the income or assets of relatives."
5. "Spend \$2.4 billion a year in general revenues to assure older persons a monthly income of at least \$130 for an individual and at least \$195 for a couple."

The new Federal Supplemental Security Income program will be administered by the Social Security Administration. This will utilize the experience and expertise of the Social Security Administration and will guarantee uniform national treatment of all elderly persons on such matters as eligibility procedures and financial assets. While the

new program is designed to assure older persons monthly income of at least \$130, and \$195 for couples, it also is designed to take account of the fact that the great majority of older persons have other income that results from past work -- generally Social Security benefits. In recognition of their past efforts, the program will disregard \$20 of any income per month. Thus, most older people will be assured monthly incomes of \$150 for an individual and \$215 for a couple. The new law also provides that in establishing eligibility, the first \$65 per month of earned income shall be disregarded and, likewise, a half of any earned monthly income over \$65 will be disregarded. In addition, States will be encouraged to supplement Federal payments where necessary to maintain January 1972 payment levels, even if they are higher than the Federal standards, without any additional cost to the States."

B. Response of Study Panel

It is the understanding of the Panel that public assistance benefits based on need without regard to residence or citizenship has not been achieved since States can still require a period of residence for State payments under H.R. 1. (This is contrary to the Supreme Court decision on residence.)

Under P.L. 92-603, minimum standards set at the poverty level have not yet been achieved. Further legislative steps are necessary to achieve this objective.

A simple declaration of need, as a means to determine eligibility should be implemented in the relevant policies adopted under H. R. 1.

The Panel is pleased that both lien laws and relative responsibility provisions are abolished under P.L. 92-603.

RECOMMENDATION XXVI

The following recommendations for improvement of Title II of the Social Security Act are made:

1. Substantial increase in Social Security NOW and to add funds from the general revenue. Senior citizens (62 and up) should be given a guaranteed income of at least \$3,000 per person and \$4,500 per couple, per year, plus an automatic cost of living increase.
2. No ceilings be placed on earnings for those persons receiving Social Security benefits.
3. Widows or widowers eligible for Social Security shall be entitled to receive the full benefits based on their spouse's earnings rather than a reduced portion as a result of their being a widow or widower.
4. Persons who have earned Social Security benefits independently, then marry, should be allowed to retain their separate benefits until such time as Congress enacts legislation to increase benefits for married couples.
5. That Social Security funds from payroll taxes be supplemented by general revenue funds in order to provide adequate benefits and keep pace with changes in the standard of living.
6. Retroactive denial of Medicare benefits should be abolished.
7. That home care services under Medicare be broadened.

A. Administration Response

1. "On October 30, the President signed H.R. 1 (P.L. 92-603), a comprehensive Social Security bill containing the following provisions which will have a major impact on the incomes of older Americans. [These provided for]....
 - a. An increase in widow's and widower's benefits;
 - b. A liberalization of the earnings test."
2. See #'s 3 and 4 under Recommendation XIII.
3. "The Social Security system is an income program that relates payments to earnings. It is a self-supporting system that is financed by payments made by the employee and the employer. The Administration believes that general revenues should be used to establish a national income floor for the elderly poor. This approach is reflected in the new Federal Supplemental Security Income program, established under the 1972 Social Security amendments."
4. "This legislation [P.L. 92-603] also relieves beneficiaries from liability in certain situations where Medicare claims are disallowed and the beneficiary is without fault, including cases where the disallowance is based on determinations that the services were not medically necessary or did not meet level-of-care requirements. The legislation further provided for advance approval of post hospital extended care and home health care coverage. These provisions should substantially alleviate the hardship of retroactive denial of benefits."

B. Response of Study Panel

The Administration has supported numerous steps to accomplish the objectives of these recommendations. Even though the Administration supported a lower increase in Social Security benefits, the recently enacted legislation has resulted in significant increases in benefits for older persons. The twenty percent increase goes far towards achieving the goal of the Conference of twenty-five percent increase in benefits.

Other provisions, which include the liberalization of earnings tests, provision of a national income floor, extension of Medicare, widows benefits liberalization, and the freezing of Part B Medicare, all are steps that go towards fulfilling the intent of the Delegates regarding these issues.

Final action on some of these objectives embraced in this recommendation have not yet been achieved. The Study Panel believes they warrant and deserve immediate action.

RECOMMENDATION XXVII

There should be adequate training of personnel to implement proposals in the area of facilities, programs, and services.

A. Administration Response

1. "Administration policies in the following areas will help institutions of higher learning to initiate, strengthen and expand programs designed to attract persons to and prepare them for careers in the field of aging."
2. "Institutions of higher education will be helped in attracting persons to and preparing them for careers in aging through the policy of providing financial assistance for students in higher education with the understanding that they will then be free to use this assistance in order to pursue any specialized program they desire to pursue."
3. "Institutions of higher learning will be helped in attracting persons to and preparing them for careers in aging by the policy of providing central coordination of the Federal Government's program of research in aging so that the large investment of resources in this area will be related to agreed-upon objectives."
4. "Institutions of higher learning will be helped in attracting persons to and preparing them for careers in aging by the policy of using Federal dollars to encourage the development of comprehensive and coordinated service programs for older persons."

B. Response of Study Panel

In view of the reduction of resources for training programs, and in the light of the need for training personnel in the field of aging, these current efforts represent an inadequate commitment on the part of the Federal government.

The need for para-professional training, retraining to expand opportunities, and the need for increased personnel in institutions that serve the elderly, at all levels, cannot be met through the Administration's proposed policies and resources.

A wide proliferation of varying efforts throughout existing programs and agencies provides further evidence of the need for more Federal support for the training of personnel in the delivery of comprehensive services to meet the many faceted problems in aging. Financial support of training should give priority to multi-disciplinary approaches and the use of innovative techniques.

RECOMMENDATION XXVIII

Tax funds should be more equitably allocated to maximize the likelihood that older persons will continue to live independently and to help ensure that older persons have a choice of living arrangements. To achieve this, a full range of supportive services must be adequately financed. These services would include visiting nursing, homemaking programs, home-delivered meals, transportation for essential services, and all other reasonably necessary services.

Tax funds should also be used to support institutional care and construct facilities. A full range of services--from minimum to maximum care--recognizing cultural differences should be available in institutions.

A personal care benefit is proposed payable to eligible older persons to enable them to purchase such required services from provider organizations in each community which includes multipurpose service centers. Basic to the ability to continue to live independently is the availability of a national health security program providing comprehensive health care services.

A. Administration Response

1. See #'s 1-12 under Recommendation I.
2. "Additional efforts are underway to increase the number of nursing home units available to elderly persons. The Federal emphasis must, however, continue to be one of assisting in financing of services provided in nursing homes through Medicare and National Health Insurance!"
3. "Nursing home accommodations insured by the Department of Housing and Urban Development have increased."
4. "President Nixon increased the authorized number of nursing home care beds for the Veterans Administration programs."
5. "Federal Medicare and Medicaid funds pay for over \$1.5 billion of services to the elderly in skilled Nursing Home and Intermediate Care Facilities."
6. "The Administration will propose a national health insurance plan to the 93rd Congress."

B. Response of Study Panel

Although the thrust of this recommendation is an appeal to create provisions to help older people live independently and to ensure choice in living arrangements, the Panel feels that there should be more recognition of circumstances unique to minority groups.

In justification of such examples, it might be pointed out that the Spanish-speaking aged request not just more housing but more housing designed according to Spanish cultural traditions; the Asians request that the cultural diversity of this sub-group be recognized; the Indians request that the new Older Americans Act funds be distributed directly to the tribes, rather than through State agencies; and the Blacks request eligibility for retirement benefits at an earlier age than non-Blacks to reflect the higher incidence of death at an early age for Black men. Eligibility for early retirement benefits should be extended to all minority groups who are shown to have high early mortality rates.

The Administration has indicated its intention to submit a limited health insurance package to Congress which to some extent will meet the purpose of this recommendation.

The Panel recommends that the Administration support large scale experiments of the concept of a personal care benefit as proposed in the recommendation. If the experiment proves successful, such benefits should be added to the health insurance package.

RECOMMENDATION XXIX

The Indian Delegates have outlined [an] area where immediate action must be taken:...[3.] That sections 303 Part (a) and section 612 of the Older Americans Act of 1965, as amended November 1970, be revised so that Indian tribes no longer have to go through State agencies for funding. This is necessary because of the lack of sympathy by most States for their Indian population. All funds for older Indian programs should be funded directly to Indian tribes.

A. Administration Response

No Response

B. Study Panel Response

The Study Panel recognizes the plight of America's Indian elderly and believes that since history and law accord the Indian a unique role in American life, the leaders of specific Indian tribes should be given the responsibility of administering the programs designed to care for their own elderly. The Study Panel urges, therefore, that Congress amend the Older Americans Act to allow for the direct administration by the tribes of Federal funds, which have been made available on behalf of America's elderly under the Act; and, that a percentage of funds allocated to a State, be made available to the tribes for this purpose.

333

HOUSING

-117-

(118=blank)

HOUSING SECTION

PREAMBLE

The Study Panel on Housing was reconvened April 5, 1973 to review the Administration response to the WHCOA recommendations on Housing. The formal response had been received by the Conference Office only days before.

We found satisfactory responses to certain of the Conference recommendations, or to some aspects of them -- particularly in broad general statements of concern for the elderly, the poor, the infirm, the plight of minority aged.

But many of the responses were totally unsatisfactory. Some were exceedingly distressing. In many instances responsibility was simply passed on to the State and Local Governments by stating that housing needs of the elderly could, or might, be met with revenue sharing funds, or through the mechanism of a proposed Better Communities Act yet to be submitted to Congress. Both of these responses are dubious and offer no hope of immediate or reliable action.

It was learned from an Administration spokesman present at the meeting that HUD processing of project applications for 1973 will total many thousand units. However, it appears that a moratorium has been placed on additional applications pending the findings of a major Administration housing study.

This moratorium on housing starts is plainly disastrous. The dangerous aspect of such a moratorium lies in the fact that it is impossible to hold elderly housing projects in abeyance for an indefinite period, and then at will, to put them in motion again by lifting a moratorium. Most such projects are sponsored by non-profit organizations whose support is carefully and sometimes painfully developed over a period of many months and even years. If the project is placed in limbo, this support melts quickly away and cannot be revived.

The time lost will be many times the duration of the moratorium and the loss of money to sponsoring organizations will be considerable. Building costs rise; options run out; the sponsors' activities are shifted to other more promising goals and programs. They sour on housing. New sponsors cannot be soon cultivated. The agencies and community leaders, who promoted the interest in the housing needs of the elderly, are left in disarray.

Since the moratorium was initiated, however, we received the following statement from HUD.

"Following is a statement relating to the impact on housing for older persons of the decision to suspend the processing of applications for subsidized housing projects:

1. A large volume of applications for subsidized housing projects had been approved by HUD field offices in late December and early January.
2. An investigation initiated by the Secretary revealed that a high percentage of the applications approved in the period just before the cut-off date were defective in one or more respects.
3. Letters of feasibility were revoked in these cases and a detailed case-by-case review was undertaken in Washington.
4. Applications found to be acceptable or technically correctable -- including applications for subsidized housing for older persons -- have been or are in the process of being returned to the field offices with instructions to continue their processing.
5. With this review of cases in technical default near completion, additional projects -- primarily but not limited to those filed prior to the moratorium -- are being processed that are related to the Administration's commitment to give special consideration to housing for the elderly and the handicapped. These projects will be processed under existing law.
6. The Secretary has recognized that the moratorium may have led to hardships in certain situations and has indicated his willingness to consider them.

The following commitment has been made relative to the over-all examination of the whole range of subsidy programs that is now under way with the end in view of submitting new legislative proposals to the Congress in September:

Organizations and individuals inside and outside of Government will have the opportunity of presenting their views relative to the special needs and concerns of older persons while the over-all examination of the whole range of subsidy programs is taking place.

These needs and concerns will be considered in the light of the objective of making sure that where funds are invested in housing for older persons a large percentage of the investment is made available in an equitable manner to older persons who genuinely need such assistance instead of having it siphoned off in some instances by intermediaries who make very little, if any, contribution to meeting their needs."

We hope that the above policy will maintain continuity in housing starts.

RECOMMENDATION I

A fixed proportion of all Government funds--Federal, State, and local--allocated to housing and related services, shall be earmarked for housing for the elderly, with a minimum production of 120,000 units per year.

A. Administration Response

1. "A major housing study is now underway within the government, under the direction of my Counsellor for Community Development. Within the next six months, I intend to submit to the Congress my policy recommendations in this field, based upon the results of that study."

"The special problems and needs of elderly persons will, in the course of this study be given close consideration."

2. "In connection with the basic review of housing policy, the Federal subsidized housing programs were suspended effective January 5, 1973. During the review, the Federal government will continue to honor commitments already made and the level of subsidized housing starts during calendar year 1973 is expected to exceed the previous year's level."

B. Response of Study Panel

The Panel wants assurance that specific funds will be earmarked for 120,000 specially designed units until the current Administration study reveals that the goals should be revised upward or downward. However, the allocation and construction of units should continue pending the completion of such study.

Vigorous State and local action must be attained if we are to achieve this goal.

Finally, the Panel calls attention to the fact that if Recommendation XII of the White House Conference Housing Section (lowering age eligibility for public housing) is implemented, then the housing goal must be revised upward from the figures now supported. The Administration Study must take this into consideration.

RECOMMENDATION II

Eligibility for the benefits of publicly-assisted low and moderate income housing and related services shall be based on economic, social, and health needs. Recipients having incomes above an established minimum level shall pay for benefits on a sliding scale related to their income.

A. Administration Response

" The Administration has considered the Conference recommendation that eligibility criteria be extended to include social needs. It recognizes that eligibility criteria for any program participation inevitably will leave out some people who might benefit from public housing. However, it believes that the most reasonable and equitable judgements on eligibility developed to date are related to economic considerations. These considerations are measurable and also tend most frequently to coincide with the social and health needs of families."

B. Response of Study Panel

The Panel suggests that the Administration undertake a careful study of the implications of possible cost benefits and of methods for measuring social needs before rejecting the concept of social needs as criterion for eligibility to residency in Federally assisted housing. An enlightened society must look at the needs of the whole person rather than only at economic indices.

RECOMMENDATION III

The Federal Government shall ensure that State, regional, and local governments and private nonprofit groups produce suitable housing for the elderly on the basis of documented need. The Federal Government shall encourage production through the uniform application and use of appropriate incentives.

A. Administration Response

1. "While the Federal government is the major source of assistance for elderly housing, the states play a major role in this area. Many states and localities have operated their own housing agencies which provide programs to assist the elderly; decisions on housing location and type are made at the local level. It is hoped that recently adopted efforts to strengthen Federal interagency cooperation, in support of State planning for aging, will result in more State and local attention to housing for the elderly."
 2. In addition, in the March message, the President said, "In the near future, I will submit to the Congress the Better Communities Act to provide revenue sharing for community development. Beginning July 1, 1974, this Act would provide \$2.3 billion a year to communities to be spent as they desire to meet their community development needs. In the interim period before the legislation becomes effective, funds already available to the Department of Housing and Urban Development will be used to maintain and support community development."
- "In the development of the proposal for submission to Congress and in its implementation upon enactment, consideration will be given to the special needs of older persons."

B. Response of the Study Panel

In view of the fact that the Administration response indicates that it will give consideration to the special needs of the elderly, the Study Panel urges that the provisions of this recommendation (III) be implemented.

RECOMMENDATION IV

A variety of living arrangements shall be made available to meet changing needs of the elderly. Such arrangements shall include residentially-oriented settings for those who need different levels of Assistance in daily living. The range shall include (1) long-term care facilities for the sick; (2) facilities with limited medical, food, and homemaker services; (3) congregate housing with food and personal services; and (4) housing for independent living with recreational and activity programs.

A. Administration Response

1. " The Administration accepts the concept recommended by the delegates to the Conference that older persons should have the opportunity of choosing the type of housing that is best suited to their needs, including the opportunity to continue to live in their own home."
2. " This concept will be considered in the review of housing programs and policies now underway."

B. Response of Study Panel

The panel commends the administration for the wide range of housing opportunities it has made available, while noting that there is an acute shortage in all categories. By providing alternative types of housing, the elderly will be assisted to live in the place of their choice and the type of housing which fits their preferences or special needs.

RECOMMENDATION V

Supportive services are essential in the total community and in congregate housing. Emphasis shall be given to providing more congregate housing for the elderly, which shall include the services needed by residents and provide outreach services to the elderly living in adjacent neighborhoods when needed to help older people remain in their own homes.

A. Administration Response

1. "The Administration is prepared to work with States, local communities and the private sector in a new effort to bring into existence comprehensive coordinated services programs for older persons at the community level. These programs should be designed to enable older persons to maintain their independence by remaining in their own homes or other places of residence."

(See also Facilities, Programs and Services)

B. Response of Study Panel

If the Administration does in fact bring into existence comprehensive, coordinated service programs for older persons at the community level, it will be providing important benefits long needed by those older persons who are capable of remaining in their own homes.

The Panel insists, however, that if such services are provided through the medium of congregate housing projects, the additional costs for these services should not be borne by the residents in the form of higher rents.

RECOMMENDATION VI

The State or Federal Government shall provide mechanisms to make possible local property tax relief for the elderly homeowner and renter.

A. Administration Response

1. "The Administration will submit to the Congress recommendations for alleviating the often crushing burdens which property taxes place upon many older Americans."
2. "In response to a recommendation of the President, the Congress passed General Revenue Sharing, which provides an opportunity to deal with the property tax issue."

B. Response of Study Panel

Mechanisms to provide property tax relief to older people have long been needed and the states that have provided such relief are to be commended. The tax relief measures they have used should be examined by other States as potential prototypes to assist their older citizens.

In addition, the Study Panel commends the President's proposal to submit legislation to provide property tax relief for the elderly.

While revenue sharing could provide some benefits, it will not necessarily provide tax relief, as the responsibility for the use of such funds is at the local level. The Administration and State agencies responsible for housing and for the older citizens welfare should urge upon the appropriate State and local governmental units that a fair share of revenue sharing funds be allocated to reduction of property tax, particularly of the elderly. This measure is of special importance until the President can reform property taxation for the elderly.

RECOMMENDATION VII

Every effort shall be made to eliminate red tape and procedural delay in the production of housing for the elderly.

A. Administration Response

1. See #1 under Recommendation I

B. Response of Study Panel

All reasons for red tape and delay should be eliminated, at both the Federal and local levels. The Study Panel does not assume that the red tape and delay to which the Delegates referred is a matter of intention, but that in fact it is a reflection of inadequate staffing and an insufficient number of well-trained field personnel. To the end of improving and speeding up procedures, HUD's staff should be adequate to the processing of such programs and should provide needed expertise at the field level to ensure the elimination of red tape and procedural delay.

RECOMMENDATION VIII

Particular attention shall be given to the needs of all minority groups and the hard-core poor elderly. At least 25 percent of the elderly housing shall be for the hard-core poor elderly, those with incomes at the poverty level or less per year.

A. Administration Response

1. "One of the Administrations highest domestic priorities this year will be the development of new policies that will provide aid to the genuinely needy families and eliminate waste." (See also #1 under Rec. VII)
2. "The Administration will continue to put emphasis on persons with lower incomes in the development of its housing programs."
3. "Federal housing programs have provided subsidies for minority groups and poor elderly in excess of the 25 percent of the total of Federally subsidized units which the Conference recommended."
4. "The Administration has provided a large volume of housing under rental programs serving low income older persons in rural areas."

B. Response of Study Panel

The panel strongly encourages continued emphasis on providing that a minimum of 25% of all elderly housing units be for low income groups. It urges that the Administration require each Regional HUD office to take the steps necessary to ensure that this policy, as proposed by the White House Conference on Aging Delegates, be carried out.

RECOMMENDATION IX

All Federal agencies dealing with housing for the elderly shall be required to establish multidisciplinary teams to formulate guidelines for architectural standards, based on the needs of the elderly. The multidisciplinary teams shall also have authority to review and approve innovative proposals.

A. Administration Response

1. "The Administration has committed attention and resources to special housing design needs of older Americans and will maintain its concern in this area.

The elderly have many special problems that do not confront younger age groups. Nowhere is this more clearly seen than in housing for older persons. As people become older, they no longer have the physical capacity of earlier years. Climbing stairs becomes more burdensome, hearing becomes less acute, and eyes become less efficient. Crime and personal security are especially serious problems for the older citizen. For these reasons, meeting the housing needs of the elderly takes on many complexities not found within the general housing market.

The Department of Housing and Urban Development has taken the following actions to meet the environmental design and standards needs of housing the elderly."

2. "The Department of Housing and Urban Development is revising and improving its standards for the minimum acceptable level of planning, construction and materials for all Departmental insured housing programs.

These proposed revisions have been circulated to many groups and specialists for review and comment. Cultural and ethnic considerations will continue to be part of housing design and environmental development. To better understand these and other varied needs of the elderly, HUD is consulting with groups and individuals encompassing a wide variety of disciplines and is working closely with the Administration on Aging in the area of research."

3. "The Department of Housing and Urban Development has taken steps to help combat the problem of crime and provide personal security.

The needs of the more vulnerable older person are being emphasized through minimum property standards to meet basic crime insurance regulations, and modernization programs in which lighting and other safeguards against crime are provided.

HUD has encouraged local communities to increase protective services available to local housing authorities and is supporting research by the Law Enforcement Assistance Administration of the Department of Justice in crime prevention in housing areas. HUD and LEAA are also leading a multi-agency task force effort to deal with security problems in public housing projects."

4. "The recently established National Center for Housing Management will stress training in the management of elderly projects.

The National Center for Housing Management (NCHM) was created in April 1972 and received grants from DHUD in order to develop more effective ways to manage public and publicly assisted housing.

While all residents are expected to benefit from this move, special efforts are being made in behalf of older persons. The Administration on Aging has supported the development of a training program by the center that deals with general and unique needs of the elderly. In addition, HUD is using research funds to assist 13 local housing authorities in cooperation with their respective governments, to demonstrate new management approaches."

B. Response of Study Panel

There is evidence of good housing design and living arrangements in HUD-assisted elderly housing, but there are also many designs that reflect insensitivity to the needs of older residents with changing physical and sensory capacities. The current consideration being given to setting standards for the housing for the elderly should take into account the requirements of the total living environment.

The Study Panel finds that the action taken by the Administration is responsive to Recommendation IX and urges that it continue to involve experts in the field as new concepts evolve.

RECOMMENDATION X

Minority nonprofit groups shall be encouraged and assisted in developing housing for the elderly.

A. Administration Response

1. "The Administration has actively encouraged the participation of minority sponsors in Federal housing programs."
2. "The Department of Housing and Urban Development has begun collecting and evaluating data concerning the participation of minority groups in Federally funded programs and the responsiveness of these programs to them."

B. Response of Study Panel

The Study Panel recognizes that if minorities interested in sponsoring housing for elderly people are to be equitably served by Federal assisted programs, HUD must be urged to take the following steps:

- identify the barriers that now interfere with minority sponsor involvement and take steps to eliminate them
- provide the needed financial assistance to minority nonprofit sponsors and develop the type of program to encourage and insure their successful involvement.
- offer orientation and technical assistance to such sponsors on an on-going basis until the financial and social success of the project is assured.

RECOMMENDATION XI

When housing units for the elderly are eliminated for any reason, adequate replacement units must be available and relocation programs provided before such persons are displaced.

A. Administration Response

1. "The Administration recognizes that older persons face particularly severe problems when they are forced to relocate and is responding by ensuring that adequate replacement units will be available before persons are displaced.

The Uniform Relocation and Real Property Acquisitions Policies Act of 1970 makes Federal assistance to State and local projects (including urban renewal and highway projects) contingent on assurances from the state and local agency that "within a reasonable period of time prior to displacement, decent safe, and sanitary replacement dwellings will be available to displaced persons..."

In this regard, the Act provides for advance, "seed money," loans to nonprofit and limited dividend sponsors who wish to work with the displacing agency in planning and developing residential units for those about to be displaced. The Department of Housing and Urban Development has recently issued guidelines to implement this provision."

B. Response of Study Panel

Relocating older people from their neighborhoods and homes is a traumatic experience. Uprooting them from their familiar neighborhoods demands sensitive attention by relocation officials. In addition to the adequacy of the house into which they are relocated consideration must be given to the suitability of the neighborhood in responding to older persons' needs, and the access to essential services it affords. Accordingly, HUD in cooperation with local groups should develop a group of specialists to work with elderly persons who are displaced in order to deal with their very unique problems. Social agencies should be encouraged to orient people to their new environment when they are relocated and to provide social services for them until such time as they are effectively integrated into the life of their new neighborhoods.

RECOMMENDATION XII

Congress should revise the definition of a family in the National Housing Act to include single persons 55 and over.

A. Administration Response

1. "The Administration in its current review of housing policy, will consider a lower age limit of eligibility for public housing as well as the effectiveness of other eligibility criteria."

B. Response of Study Panel

The Panel urges the Administration to adopt this recommendation that the definition of a family in the National Housing Act include single persons 55 and over.

RECOMMENDATION XIII

The Federal Government shall encourage the preservation of neighborhoods of special character through rehabilitation, and selective replacement of substandard dwellings with new dwellings, with full provision for the elderly of the area to remain in their familiar environment.

A. Administration Response

1. See #2 under Recommendation III.

B. Response of Study Panel

It is the understanding of the Study Panel that the Better Communities Act will provide a means for model cities, neighborhood preservation and the rehabilitation of existing structures.

The full implementation of this recommendation requires cooperation among Federal, local government and the community. This must result in closer attention by HUD representatives to the policy the the Delegates proposed for the preservation of familiar neighborhoods.

RECOMMENDATION XIV

Housing funds now impounded by the Administration should be released and the highly effective section 202 of the Housing Act with its special guidelines related to space, design, construction, and particularly favorable financing restored.

New Section 202 projects should be established by recirculating monies now being sent to the United States Treasury from mortgage payments and Section 202 conversions to Section 236 or like programs. Such conversions of current Section 202's should be encouraged by establishing incentives.

A. Administration Response

1. No response to the call for release of impounded funds.

B. Response of Study Panel

The strong support of the Section 202 program by the Delegates to the Conference is due to its unique characteristics that make it especially attractive to non-profit sponsors of elderly housing.

In the review of housing policies that HUD is now making the study panel urges that the essence of the 202 program be included in any new housing program for the elderly.

RECOMMENDATION XV

The Rent Supplement Program shall be increased in dollars and eligibility.

A. Administration Response

1. No specific response to the recommendation on rent supplements.

B. Response of Study Panel

The Study Panel urges the continued use of rent supplements, which assures housing for more persons with limited income, and the Panel supports the Delegates recommendation for an increase in rent supplements.

Recommendation XVI

Financial incentives shall be available to families providing housing and related care in their own homes, or in appropriate accommodations for their elderly relatives.

A. Administration Response

1. "Tax relief is being provided households taking care of dependent elderly persons; a child can deduct up to \$400 a month in expenses to have parents taken care of in order to permit the taxpayer to be gainfully employed."

B. Response of Study Panel

The White House Conference Delegates did not limit their recommendation to providing tax relief to any income group or state of employment. Financial relief should be available to all people who care for older relatives.

The Panel agrees employment is an improper criterion for such relief, as costs are borne by whoever cares for older relatives. By making financial relief available to all of those providing care, both low and moderate income families will be far better able to house and care for older relatives, and the total Federal outlay for care of the elderly would probably be less than the cost on institutionalization of the old for whom care must be provided.

RECOMMENDATION XVII

The Federal Government shall provide financial incentives to State and local governments to encourage property tax exemption of voluntary, nonprofit sponsored elderly housing projects.

A. Administration Response

1. "In response to a recommendation of the President, the Congress passed General Revenue Sharing which provides an additional opportunity to deal with the property tax issue."
2. In March, 1973, the President stated, "I will submit to the Congress recommendations for alleviating the often crushing burdens which property taxes place upon many other Americans."

B. Response of Study Panel

The Study Panel suggests that the Administration's methods for providing property tax relief include incentives to secure local tax abatement of nonprofit sponsored housing projects for the elderly.

Recommendation XVIII

The inability of the elderly to financially maintain their homes because of high maintenance costs and increasing taxes resulted in the recommendation that interest-free, non-amortized loans be made available, the amount of the loan to be related to income, with repayment either upon the death of the borrower or the transfer of the property. As an additional element of national policy, it is proposed that ways or mechanisms be researched to enable older homeowners to voluntarily utilize the equities in their homes, to increase their discretionary income while remaining in their own homes.

A. Administration Response

1. No response.

B. Response of Study Panel

This is an important recommendation to which the Administration did not respond. The Study Panel recommends that the committee making the major housing study for the Counsellor for Community Development weigh carefully the following points.

Approximately 70 percent of all older persons own their own home. The Delegates were concerned that something be done to assist lower income older persons retain their homes.

The Study Panel recommends that the Administration consider the following points:

1. Subsidy plan for home maintenance
2. Sub-dividing homes to provide income and additional dwelling units for the elderly.
3. Advice and assistance for the elderly in the sale of their homes and in securing replacement dwellings
4. Some form of revolving loan funds (perhaps on a credit union basis) to provide funds and credit for home repairs, compatible with the age and income of the elderly.
5. Home equity to provide monthly annuities to enable the elderly to maintain their homes

6. The establishment of local quasi-public agencies to administer the recommended programs and to provide technical advice or assistance to the elderly for the maintenance, management and disposition of their homes.
7. Actively solicit other creative proposals.

RECOMMENDATION XIX

Congressional action shall be taken to establish within the Department of Housing and Urban Development an Office of Assistant Secretary of Housing for elderly. This Office shall have statutory authority and adequate funding to provide overall direction toward the implementation of a national policy and the production of housing for the elderly.

A. Administration Response

1. "...HUD has appointed an Assistant to the Secretary for Programs for the Elderly and the Handicapped to assess all [HUD] programs to ensure that they are fully responsive to the needs of the elderly."

B. Response of Study Panel

HUD should be commended for the appointment of an Assistant to the Secretary for the Elderly and Handicapped. The Study Panel, like the Delegates, believes that the needs of older persons would be further met by the establishment of a position of Assistant Secretary. The overall problems of the elderly, which affect the entire population, require the special attention such a position would ensure.

Recommendation XX

Executive action shall be taken to create an Executive Office on aging within the Office of the President.

A. Administration Response

1. "The President has created the position of Special Consultant to the President on Aging, within the Executive Office."
2. "The President created the Domestic Council Committee on Aging to respond to the needs of the elderly at the highest levels of government."

B. Response of Study Panel

The President is commended for his actions in creating a Domestic Council Committee on Aging and appointing a Special Consultant on Aging. The Study Panel recommends that this arrangement be continued and that the further implementations of the White House Conference on Aging recommendations be a continuing responsibility of the Committee.

Recommendation XXI

Congressional action shall be taken to create a Special Committee on Aging in the House of Representatives

A. Administration Response

No response [Report notes, however, that "Most of the recommendations dealt with action required of the Federal Executive branch of the government; responsibility for initiative and action on this particular suggestion obviously rests with the Members of the House of Representatives."]

B. Response of Study Panel

The establishment of a committee in the House similar to the Senate Special Committee on Aging would highlight the issues of critical importance to older persons, and assist in the development of legislation. The Study Panel recommends that the Post Conference Board of the White House Conference on Aging memorialize the House of Representatives requesting that such a committee be established as recommended by Conference Delegates.

Recommendation XXII

The Congress shall enact legislation to safeguard the elderly property owner or purchaser from unscrupulous real estate developers and/or promoters.

A. Administration Response

1. "The President has asked his Special Assistant for Consumer Affairs, in cooperation with the Secretary of HUD, to develop a program to help enforce the Interstate Land Sales Full Disclosure Act."

B. Response of Study Panel

In order to fulfill the delegates' recommendation, the Congress should reconsider the establishment of a Consumer Protection Agency, with specific provisions to protect the interests of older persons in their real estate transactions who are particularly vulnerable to fraudulent acts.

Recommendation XXIII

The Congress shall enact legislation providing special funds for adequate housing and supportive programs to meet the unique needs of rural elderly Americans including those on Indian Reservations.

A. Administration Response

1. " The Administration is committed to the goal of a decent home and a suitable living environment for every American family, including the elderly."
2. " The Farmers Home Administration (FMHA) has expanded its rural rental housing program for low to moderate income families from \$13 million in 1968 to a projected \$70 million in fiscal 1973. Over 40 percent of the rental units funded through this program are occupied by persons 62 years old or over."

B. Response of Study Panel

Action taken to date with respect to the housing needs of rural elderly Americans, and those on Indian Reservations, reflect commendable progress and genuine concern by HUD, the Department of Agriculture, and the Bureau of Indian Affairs. These programs are not sufficiently funded, however; and if the intention of the Conference Delegates is to be realized, funding must be substantially increased. The Panel suggests that some priority setting may be needed, if resources are limited, to ensure that these specially deprived groups have a fair portion of available funds compatible with the level of their housing deprivation.

RECOMMENDATION XXIV

Standards for physical and environmental security should be developed and applied as an integral and basic element of all housing projects serving the elderly.

A. Administration Response

See responses to Recommendation IX.

B. Response of Study Panel

HUD has responded to the Delegates' recommendation that both physical and environmental protective measures be applied in all elderly housing. The Study Panel urges the continuation and expansion of these measures. It adds, also, the recommendation that a program be developed by HUD which would involve the elderly tenants in solving some of the special security problems. The new National Training for Housing Management may well request to include the development of security measures for use by the elderly as one of the components in the training of housing managers.

Recommendation XXV

Competent service to the elderly in housing requires sound research widely disseminated and utilized, covering many aspects of their living arrangements. Such research shall be undertaken to cover the health, physical, psychological, and social aspects of environment in urban and rural areas; to delineate the needs of elderly over 80 years of age; to determine the needs of transient elderly; to establish the importance of selecting appropriate locations; and to provide safe and adequate construction. Particular attention is directed to the consequences to vulnerable older people of improper sales methods and inadequate housing arrangements.

There also shall be undertaken a well-conceived and well-financed program of training for professional and semi-professional staff to develop efficient and competent management in developments for the elderly.

A. Administration Response

1. "What we need is a comprehensive, coordinated research program, one which includes disciplines ranging from biomedical research to transportation systems analysis, from psychology and sociology to management science and economics."
2. "A citizen's Technical Advisory Committee for Aging Research has been named by HEW to bring together the total research resources available to the Federal Government in the field of aging into a comprehensive strategy designed to achieve the objective expressed by delegates and concurred in by the President."
3. "The Administration believes that the most effective means for the Federal government to advance research in the field of aging is to tap all of the Federal Government's resources and relate them to agreed upon objectives. This process will involve more than would be accomplished if an Institute on Research in Aging were to be located in just one of the many departments and agencies involved in research in aging."

4. "A Center for Aging Research will be created within the National Institute for Child Health and Human Development to coordinate the activities of the Gerontology Research Center and the Adult Development and Aging Branch."
 5. "The National Center for Health Services Research and Development (NCHSRD) is concerned with a wide range of research concerning older persons among which is an evaluation of models for alternatives to institutional care which is, of course, closely related to housing."
 6. "The National Center for Housing Management was established and will include training in the management of elderly projects."
-
7. "The Administration on Aging is slated to spend seven million dollars in FY 1974 on a wide range of high-impact projects including studies for structural or institutional changes required to increase the options for independent living."
-
8. "HUD is supporting significant research related to the needs of older persons, including Operation BREAKTHROUGH, housing allowance experiments, public housing management improvement, residential security, home owners equity, and relationship of housing to transportation."
 9. "Administration policies in the following areas will help institutions of higher learning to initiate, strengthen and expand programs designed to attract persons to and prepare them for careers in the field of aging:
 - a. Providing financial assistance for students in higher education with the understanding that they will then be free to use this assistance in order to pursue any specialized program they desire to pursue.
 - b. Providing central coordination for the Federal government's programs of research in aging so that the large investment of resources in this area will be related to agreed-upon objectives.
 - c. Using Federal dollars to encourage the development of comprehensive and coordinated service programs for older persons at the community level."
 10. "The Department of Health, Education and Welfare is currently financing the training of nursing home personnel to recognize and deal with emotional problems faced by patients in long-term care institutions."

B. Response of Study Panel

While it is obvious that there is a recognition in the Federal Department of the need for comprehensive research related to older persons, the Panel believes that there is insufficient activity relating directly to housing for the elderly. HUD and other agencies should sponsor studies on the affect of housing programs on the well-being of older population, taking into consideration the special needs of those in the upper age bracket of the elderly and those in needing transient housing, particulary where special supportive facilities are located.

The panel commends the Administration for its actions on management training. It strongly recommends that training for the management of elderly housing projects, which have special problems, be made an essential component of all aspects of housing management curriculum.

The Study Panel is deeply concerned over the curtailment of funds and programs for research and training with respect to elderly housing.

The Study Panel is particularly concerned over the lack of financial support for relevant training programs in colleges and universities.

367

INCOME

-151-

(152=blank)

Study Panel Report

INCOME

Preamble

The panel, in reviewing the action of the Administration and Congress, continued to believe that the primary concern of the nation should be that which was voiced in the preamble to the Conference recommendations on Income. It stated:

There is no substitute for income if people are to be free to exercise choices in their style of living.

The income of elderly people in the past left the greater number of them with insufficient means for decent, dignified living. During the Sixties, the elderly as a whole enjoyed improvements through greater employment opportunities and better old age security and other public and private benefits. The last 2 years have witnessed the reversal of these trends toward improvement as inflation continued to erode the purchasing power of fixed incomes, and rising unemployment reduced job opportunities for older workers. The economic situation of the elderly, if past experience is repeated, will improve more slowly than that of younger groups even with an upturn in the national economy. Immediate action to increase the income of the elderly is urgent and imperative.

Since the Conference, there has been some significant progress toward this goal, notably, the twenty per cent increase in Social Security benefits, the granting of full benefits to widows, liberalization of the retirement test, and the creation of a federal supplemental income program for the aged, blind and disabled. On the other hand, we are concerned that the Administration has rejected the proposed income standard for the elderly and that none of the specific measures assures the minimum as recommended by the Conference. It is especially regrettable that neither the Administration nor the Congress has seen fit to implement the recommendation for a contribution from the general revenues to the financing of the Social Security system. Without this, in our judgement, there is little hope that a further liberalization of the program or relief from the heavy burden of Social Security taxes on the low income worker will occur. In addition, the panel has concern for the income plight of widows under age 60.

RECOMMENDATION I

Income Adequacy--The immediate goal for older people is that they should have total cash income in accordance with the "American Standard of Living."

We, therefore, recommend the adoption now, as the minimum standard of income adequacy, of the intermediate budget for an elderly couple prepared by the Bureau of Labor Statistics (nationally averaging about \$4,500 a year in Spring 1970). This level must be adjusted annually for changes in both the cost-of-living and rising national standards of living.

For single individuals the minimum annual total income should be sufficient to maintain the same standard of living as for couples (not less than 75 percent of the couple's budget). For the elderly handicapped with higher living expenses, the budget should be appropriately adjusted.

A. Administration Response

1. "The Administration is firmly committed to insuring an adequate income for older Americans. This commitment is based on the President's conviction that "the best way to help people in need is not by having Government provide them with a vast array of bureaucratic services, but by providing them money so that they can secure needed services themselves.

While the Administration does not believe that the Nation should settle for the status quo, it does believe that important steps have been taken recently with respect to the area of income for older persons.

...the "intermediate" budget developed by the Bureau of Labor Statistics...is only one of three patterns, namely, lower, intermediate and higher, which are illustrative of the way elderly couples could spend

their incomes. In developing the three family budget groupings, the Bureau of Labor Statistics studies assume that the elderly couple has the following characteristics: a husband and wife, both age 65 or over, living in their own home, both in reasonably good health and able to take care of themselves. They assume further that a couple with a lower budget relies more heavily on public transportation and free recreational facilities in the community than a family with an intermediate or higher budget. These assumptions permit the Bureau of Labor Statistics to make statistical estimates but do not mirror the actual circumstances of a large number of the elderly.

Therefore, while these studies are interesting and useful in their own right, they provide no basis for knowing whether any particular level of income is "adequate" under varying sets of circumstances."

2. "It is clear from this analysis that further work is required before a satisfactory definition of "adequate" income can be developed. The Department of Health, Education, and Welfare has initiated studies which will be utilized by an interagency task force of the Human Resources Committee of the Domestic Council that will be established immediately to come to grips with this issue."
3. "Provision has been made for a national income floor for older persons -- an action which the President first recommended to the Congress in 1969.

The Social Security Amendments of 1972 include provisions which will replace the present Old Age Assistance program with a Federally financed program of Supplemental Security Income which will provide a guaranteed minimum monthly income for a couple. It will dedicate approximately \$2.4 billion of general revenue to assisting those whose income is now below the poverty line. The program, which will benefit an estimated 4.6 million older persons, as contrasted with the 2.13 million who are now under Old Age Assistance, will be administered by the Social Security Administration."

4. "As we move toward the goal of an adequate income for older Americans, we must endeavor to make sure that older Americans receive a fair share of the benefits which will accrue to our society as a result of increased productivity."

5. "On July 1, 1972 the President signed legislation to make Social Security benefits "inflation proof" through a cost-of-living escalator.

In the legislation President Nixon submitted to Congress in September 1969, he asked that Social Security payments, for the first time, be automatically protected against inflation. Whenever the Consumer Price Index increased by 3 percent or more, benefits would be increased by an equal amount.

In his signing statement, the President said, "This action constitutes a major breakthrough for older Americans, for it says at last that inflation-proof Social Security benefits are theirs as a matter of right, and not as something which must be temporarily won over and over again from each succeeding Congress."

6. "Incomes of older persons have been dramatically increased over a three year period through existing income assistance programs.

By the end of 1972, three major Social Security increases will have taken effect since January 1970. Benefit payments as of the end of 1973 will be some \$25 billion more than they were at the end of 1969. The compound effect of the 15, 10, and 20 percent increases approved during this Administration is a 51.8 percent increase since 1969, representing the greatest rate of increases in Social Security since 1950.

These increases mean that the average annual Social Security benefit for an individual will be nearly \$1,900; for a couple it will be \$3,276. Today, a 65 year old covered retiree -- who during his working years was at the top of the Social Security wage base -- will receive an annual income of \$3,193; for a couple it will be \$4,790. These represent substantial increases over the benefits being paid four years ago. Through these increases, older Americans have shared significantly in the rising national standard of living."

B. Response of Study Panel

The White House Conference recommended a specific minimum standard of income adequacy and stated how this could be determined. The Administration has rejected this standard but has provided no alternative standard of adequacy. We urge that the study underway initiated by DHEW be pursued vigorously.

To the extent that the standard of the Administration and Congress can be inferred from the recently enacted minimum income provisions of \$130 for individuals and \$195 for couples, it is noted that standard falls far short of the Conference's recommendations. Furthermore, the new minimum benefit for long-covered OASDI beneficiaries (\$170/month if covered 30 years) does not meet the recommended standard.

There has been inadequate recognition of the need for a budget standard appropriate for a single individual or for a standard appropriate for the greater budget needs of the handicapped elderly; we urge the study initiated by DHEW to take adequate account of the needs for special budget standards for these groups.

The Panel feels that the call for a minimum standard of adequacy equal to the intermediate budget as established by the Bureau of Labor Statistics is a reasonable one and hopes that some effort will be made to approximate this standard.

The Panel also hopes that progress will be made toward implementation of the Conference recommendation that older people receive cash income in accordance with the "American standard of living" which recognizes that older persons should be protected not only against inflation but should also share in the increased productivity of the nation.

RECOMMENDATION II

Providing Floor of Income---The basic floor of income for older people should be provided through a combination of payments from the Social Security System and payments from general tax revenues. This proposal would retain the basic features of the Social Security program. In addition, there should be a supplementary payment system based on an income test to bring incomes up to the minimum, financed entirely from Federal Government general revenues and included in a single check from the Social Security Administration.

A. Administration Response

1. "The Administration believes that the time has come to assure an income floor for older people. On October 30, 1972, the President signed H.R. 1 (P.L. 92-603) which included provision for an income floor for older persons through a Federal Supplemental Security income program based on need, which will supplement income from such sources as Social Security, private pensions and employment.

Approximately 85 percent of all Americans over 65 receive regular cash payments under Social Security. Ninety-three percent of those now reaching 65 are eligible to receive such benefits when they or their spouses retire.

The Social Security system is an income program that relates payments to earnings. It is a self-supporting system that is financed by payments made by the employee and the employer. The Administration believes that general revenues should be used to establish a national income floor for the elderly poor. This approach is reflected in the new Federal Supplemental Security Income program, established under the 1972 Social Security amendments, which starting in 1974, will:

- a. Establish a national income floor for an estimated 4.6 million older persons. This will be an increase of approximately 2.5 million over those now covered by the Federal-State public assistance program.

- b. Apply uniform national eligibility standards.
- c. Provide for eligibility standards which eliminate the practice of placing liens on homes and provide that eligibility will be determined without regard to the income or assets of relatives.
- d. Spend \$2.4 billion a year in general revenues to assure older persons a monthly income of at least \$130 for an individual and at least \$195 for a couple.

The new Federal Supplemental Security Income program will be administered by the Social Security Administration. This will utilize the experience and expertise of the Social Security Administration and will guarantee uniform national treatment of all elderly persons on such matters as eligibility procedures and financial assets. While the new program is designed to assure older persons monthly income of at least \$130, and \$195 for couples, it also is designed to take account of the fact that the great majority of older persons have other income that results from past work -- generally Social Security benefits. In recognition of their past efforts, the program will disregard \$20 of any income per month. Thus, most older people will be assured monthly incomes of \$150 for an individual and \$215 for a couple. The new law also provides that in establishing eligibility, the first \$65 per month of earned income shall be disregarded and, likewise, a half of any earned monthly income over \$65 will be disregarded. In addition, States will be encouraged to supplement Federal payments where necessary to maintain January 1972 payment levels, even if they are higher than the Federal standards, without any additional cost to the States."

2. See #4, #5, and #6 to Recommendation I.

B. Response of Study Panel

While the Administration and the Congress have recognized the need for an increase in the benefits of the Social Security system and have given some attention to a national income floor, they have rejected the basic recommendation calling for significant support for the Social Security system from general tax revenues.

The new supplementary payment system does provide an income-tested national minimum income financed entirely from general revenue funds but the income level is far below the Conference recommendation. This will place a large burden on those people who are not covered by Social Security. One consequence of this inadequacy is that the States may become involved in supplementary systems, which is not only contrary to the Conference recommendation but we feel, is also undesirable in itself.

To achieve an adequate minimum standard of income, it is an absolute prerequisite to provide substantial support for the Social Security system from general tax revenues and total support for the supplementary system from Federal revenues.

Furthermore, supplemental payments must be raised to the level called for by the Conference if a truly adequate income is to be provided for older persons. The Study Panel notes with approval the Administration's expressed desire to "make sure that older Americans receive a fair share of the benefits which will accrue to our society as a result of increased productivity". We call upon the Administration to make specific recommendations for the obtainment of this objective at the earliest possible date. The Panel believes - as set out in our response to Recommendation I - that this important objective can only be attained by the provision for an automatic adjustment of income levels, under all income maintenance programs, for the aged to reflect changes in increased productivity, as well as increases in the cost of living.

RECOMMENDATION III

Liberalizing the Retirement Test--Many older persons work in order to supplement their retirement income.

The exempt amount of earnings under the Social Security retirement test should be increased to not less than \$3,000 a year (adjusted periodically to changes in the general level of wages).

The offset formula of \$1 reduction in benefits for each \$2 of earnings should apply to all earnings in excess of the exempt amount.

Elimination of the test would cost an additional \$3 billion, and there are more urgent needs to which this sum could be applied than paying benefits to persons who are still employed at more than the exempt levels.

A. Administration Response

1. "The President has signed legislation which increases to \$2,100 the amount a Social Security beneficiary can earn in 1973 and later years without having payments reduced. This recent legislation provides that the exempt amount will be automatically increased in the future to keep pace with increases in average wages covered under Social Security.

In addition, benefits will be reduced by \$1 for each \$2 earned above \$2,100 no matter how high the earnings might be so that there will be no dollar-for-dollar reduction as now occurs with respect to earnings above \$2,880."

B. Response of Study Panel

The panel is gratified that the Conference recommendations for a higher retirement test and for periodic adjustments in it have been enacted into law and that the offset formula has been changed to provide for the reduction of only one dollar of benefit for each two dollars of earnings in excess of the exempt amount.

It should, however, be noted that the level of exempt earnings is \$900 below the Conference recommendations.

RECOMMENDATION IV

Widow's Benefits---Increasing numbers of women without dependent children who have not been regularly employed are becoming widowed before age 60. We recommend that they be eligible to receive widow's benefits starting at age 50 to help fill the income gap until they are eligible at the later age to receive their Social Security benefit.

A. Administration Response

1. "The Social Security Administration has under study the recommendation to change age eligibility limits for widows."
2. "Increased widow's benefits. About 58 percent of the population age 65 and over are women, most of whom depend primarily on Social Security benefits earned by their husbands. Under prior law, however, a widow was eligible for only 82 1/2 percent of the amount her deceased husband would receive if his benefits started at or after age 65. Under P.L. 92-603, a widow (or widower) who first becomes entitled to benefits at or after age 65 will receive a benefit equal to 100 percent of her deceased husband's primary insurance amount if he did not receive reduced benefits before his death. If he did receive reduced benefits, the widow's benefit can be no more than the amount her husband would be receiving if he were still alive. (A widow who becomes entitled to benefits at or after age 62 will receive no less than 82.5 percent of her husband's primary insurance amount.) Benefits for widows (or widowers) who become entitled to benefits between ages 62 and 65 will be reduced to take account of the longer period over which they are paid, just as a worker's benefit is reduced if he takes benefits before age 65. Benefits will range from 71.5 percent of the deceased husband's primary insurance amount at age 60 to 100 percent at age 65."

B. Response of Study Panel

There has been no action by the Administration or the Congress to deal with the problems of widows 50 years of age and older as specifically reflected in the Conference Recommendation calling for eligibility liberalizations so that widows without dependent children could receive widow's benefits starting at age 50, instead of age 60 as now. The Panel is pleased to learn that this matter is now under study by the Social Security Administration and hopes that these studies will be carried out expeditiously and action proposed in line with the Conference recommendation.

RECOMMENDATION V

Extending "Special Age-72 Benefits"--- Certain residents of the Commonwealth of Puerto Rico, Samoa, the Virgin Islands, and Guam are presently excluded from special benefits which are otherwise applicable to persons over the age of 72 who reside in the United States.

We recommend that the 1965 amendments to the Social Security Act, providing for special benefits to all persons 72 years of age and older not otherwise receiving benefits, be applied without discrimination to all residents of Puerto Rico and the territories and possessions of the United States.

A. Administration Response

- i. "Some of the specific recommendations made by minority groups are now being studied by the Social Security Administration as recommended by the delegates to the Income Section.

Recommendations under study include...extension of special benefits for persons 72 years and over to residents of the Commonwealth of Puerto Rico, Samoa, the Virgin Islands, and Guam."

B. Response of Study Panel

While some of the recommendations pertaining to alleged discriminatory treatment of certain minority groups may well call for careful study, we see no necessity for a study of the exclusion from the Prouty Amendments of residents of the Commonwealth of Puerto Rico, Samoa, the Virgin Islands, and Guam. The facts are clear, no difficult administrative or policy issues are involved and the numbers affected are very small. We urge immediate implementation of the Conference Recommendation.

RECOMMENDATION VI

Position of Disadvantaged Groups under Social Security---Studies should be made to determine whether there are disadvantaged groups within the population whose age at retirement or benefits under the Social Security System may be inequitable because of shorter life expectancy due to social and economic conditions or racial discrimination.

A. Administration Response

1. "Some of the specific recommendations made by minority groups are now being studied by the Social Security Administration as recommended by the delegates to the Income Section.

Recommendations under study include: determining whether members of certain minority groups are being disadvantaged under present retirement age and benefit standards because of shorter life expectancy...."

B. Response of Study Panel

The panel notes with interest that the Social Security Administration is now conducting the recommended studies. We also welcome the consideration of these problems by the Senate Committee on Aging. We urge that the Senate Committee on Aging pursue its study with vigor and report its findings to Congress at the earliest possible date. In view of the intense interest expressed by the Special Concerns Sessions on Aging and Aged Blacks, the Poor Elderly, the Asian American Elderly, and the Spanish Speaking Elderly, these findings of the Social Security Administration should be reported to the Domestic Council on Aging and the Congress with a view to prompt appropriate action.

RECOMMENDATION VII

Financing Social Security---The financing of the Social Security System should include a contribution from general revenues. The whole structure of payroll taxes should be reviewed to lighten this burden on low-income workers.

A. Administration Response

1. "The Social Security system is an income program that relates payments to earnings. It is a self-supporting system that is financed by payments made by the employee and the employer. The Administration believes that general revenues should be used to establish a national income floor for the elderly poor. This approach is reflected in the new Federal Supplemental Security Income program, established under the 1972 Social Security amendments, which starting in 1974, will...among other things, establish a national income floor for an estimated 4.6 million older persons. This will be an increase of approximately 2.6 million over those now covered by the Federal-State public assistance program."

B. Response of Study Panel

The panel has dealt with the first element of this recommendation when it considered Recommendations 1 and 2. However, the Administration has rejected the significant concept of general revenue contributions to the OASDI programs under Social Security. The panel therefore believes it is necessary to strongly reaffirm its commitment to this Conference recommendation.

The panel deeply regrets that though the Conference recommended a review of the payroll tax structure and that the issue was seriously considered by the Congress, the Administration has not even conducted studies on the subject to determine either the desirability of feasibility of lightening the burden the system now places on low-income workers.

In view of the fact that, this issue will undoubtedly be under consideration by Congress again, the Administration should immediately conduct a study of the payroll tax system.

The passage of HR 1, which provides for an eventual employee/ employer tax rate of over 14% will impose an even heavier burden on the low-income worker, and makes the implementation of both parts of this recommendation all the more imperative.

RECOMMENDATION VIII

Private Pensions---Social Security benefits provide a basic protection which should continue to be improved but which can be augmented through private pension plans.

The Federal Government should take action to encourage broader coverage under private pension plans and insure receipt of benefits by workers and their survivors. It should require early vesting and/or portability, survivor benefits, and complete disclosure to beneficiaries of eligibility and benefit provisions of the plans. In addition, Federal requirements should assure fiduciary responsibility, minimum-funding requirements and protection, through reinsurance, and other measures, of the promised benefits.

A. Administration Response

1. "This Administration agrees with the views of delegates to the White House Conference on Aging that private pensions are an important source of income for the elderly and firm action must be taken to assure that private pension plans operate fairly and effectively. In his March 1972 message to Congress the President supported the view of the Conference saying, "the long range answer to adequate income for the elderly does not lie in government programs alone; it also requires expansion and reform of our private pension system."
2. "The President has proposed the following five point program for strengthening and encouraging the growth of the private retirement system and protecting the pension rights of workers from loss caused by changing jobs or mismanagement of pension plan funds.
 - a. Tax deductions to encourage independent savings toward retirement.

Workers not covered by employer financed retirement plans would be permitted to establish their own retirement plans and make tax deductible contributions to them up to an annual limit of 20 percent of earned income or \$1500, whichever is less.

Workers covered by employer financed plans would also be permitted to make tax deductible contributions to their own retirement plans; however, their deductible amount would be reduced to reflect employer contributions made

on their behalf. Individuals would also be able to defer taxation on investment earnings on contributions to their own retirement plans.

- b. More generous tax deductions for pension contributions by self-employed persons.

The annual limit for deductible contributions to pension plans by the self-employed -- on their own behalf and for those who work for them -- should be raised from \$2,500 to 10 percent of earned income, whichever is less, to the lesser of \$7,500 or 15 percent of earned income.

- c. Requiring the vesting of pensions.

Older workers need pension vesting protection because they lack the opportunities of younger people to start new careers and build new sources of retirement income. If the older worker loses his job or wants to move to a new job, he can't afford to lose his accumulated pension rights; but that is what happens unless those pension rights are vested. To change this situation, the President's proposal would establish the Rule of 50 as a Federal standard under which all pensions would become 50 percent vested when an employee's age plus years of participation in a plan total 50, increasing 10 percent for each year of service thereafter until fully vested. Under this proposal, the proportion of participants in private pension plans with vested pensions would rise from 31 percent to 46 percent and among such participants aged 45 and over the increase would be from 60 percent to 92 percent.

- d. The Employee Benefits Protection Act.

This legislation was first proposed to the Congress in March of 1970; it was strengthened and resubmitted in 1971. It would require that pension funds be administered under strict fiduciary standards and would provide certain Federal remedies when they are not. It would also require that plans provide full information to employees and beneficiaries concerning their rights and benefits.

- e. A Study of pension plan terminations.

In his December 1971 message, the President also directed the Departments of Labor and the Treasury to undertake a study concerning the extent of benefit losses which result from the termination of private pension plans. Terminations that occurred during 1972 are now being analyzed and the study will be completed shortly."

B. Response of Study Panel

Despite the introduction in the Congress of a number of bills relating to various aspects of private pensions, none have been enacted.

The panel urges both the Administration and the Congress to give serious consideration to all of the features recommended by the Conference to improve pension plans in the country.

RECOMMENDATION 1X

Remission of Property Taxes---It is desirable that older persons be enabled to live in their homes. States and localities should be encouraged to remit part or all of the residential property taxes on housing occupied by older persons as owners or tenants who qualify on the basis of an appropriate measure of income and assets.

A. Administration Response

1. "The Administration firmly agrees with Conference delegates that the burden of property taxes must be eased.

The President expressed his agreement in his Special Message on Aging in March 1972:

"Two-thirds of all older citizens -- and 78 percent of older married couples -- own their own homes. For these Americans -- and for many younger Americans as well -- the heavy and growing burden of property taxes constitutes one of the most serious of all income-related problems. Even those who rent their homes often bear an unfair burden since property tax increases are frequently passed along in the form of higher rents. The reason these burdens are so onerous, of course, is that the income from which property taxes must be paid by the elderly is usually going down at the very time the taxes are going up."

"Property taxes in the United States have more than doubled in the last ten years. The problems which this fact implies are felt by Americans of all ages. But elderly Americans have a special stake in their solution."

In October 1972, the President said in a radio address to the Nation:

"One of my highest priority proposals to the new Congress will be property tax relief for older Americans."

2. "In March 1973, the President said in the Human Resources Section of his 1973 State of the Union Message:

"I will submit to the Congress recommendations for alleviating the often crushing burdens which property taxes place upon many older Americans."

3. " In response to a recommendation of the President, the Congress passed General Revenue Sharing which provides an additional opportunity to deal with the property tax issue. "

B. Response of Study Panel

The recently enacted revenue sharing measure provides an opportunity for States and localities to remit or at least to lower property taxes for older persons who qualify on the basis of an appropriate measure of income and assets. The Panel urges that they will take advantage of this opportunity. However, it must be recognized that there are other sources competing for these funds and the Panel notes that there is little evidence that these monies are being used for the benefit of older persons.

The Panel recommends that the Administration monitor the use of these new funds by States and localities, and render periodic reports to the Congress and the Domestic Council Committee on Aging on their findings with a view to action assuring equity for older persons.

The Panel is encouraged by the President's commitment to alleviate "the often crushing burdens which property taxes place upon many older Americans." We await with interest the details of the Administration's proposal and hope it will fully reflect the recommendations of the White House Conference.

RECOMMENDATION X

Meeting Health Needs---This Nation can never attain a reasonable goal of income security so long as heavy and unpredictable health costs threaten incomes of the aged.

Priority consideration should be given to the establishment of a comprehensive national health security program which would include the aged as well as the rest of the population. Financing the program solely through wage and payroll taxes and contributions from Federal general revenues would ensure that health care expenses would be a shared responsibility of the Government, employers and individuals. There should be no deductibles, co-payments, or co-insurance.

Until such a system is established, the benefits of Medicare-Medicaid should be increased immediately to include, at a minimum, out-of-hospital drugs, care of the eyes, ears, teeth, and feet (including eyeglasses, hearing-aids, dentures, etc.), and improved services for long-term care, and expanded and broadened services in the home and other alternatives to institutional care. Here, too, there should be no deductibles, co-payments, or co-insurance.

Government should assume responsibility for assuring an adequate supply of health manpower and essential facilities and for improving the organization and delivery of health services.

A. Administration Response

1. "This Administration vigorously supports a fiscally responsible and administratively workable national health insurance plan.

The President believes that Congress should enact a major, comprehensive program that will improve the health care of all Americans, and that will enable every citizen to get quality health care at reasonable cost regardless of income. At the same time, he believes it should not impose a stunning new financial burden on every American taxpayer...."

2. "The President signed into law P.L. 92-603 which limits future increases in the premium for supplementary medical insurance under the Medicare program.

The Social Security Amendments of 1972, P.L. 92-603, include a provision which would partially "freeze" the Part B premium. In any given year after 1974, the premium will rise by no more than the percentage by which cash benefits have been increased across the board since the premium was last increased."

3. "The Administration has urged Congress to approve a program to aid in the demonstration of Health Maintenance Organizations that would provide comprehensive health care services.

The Health Maintenance Organization concept is a method for financing and providing health care that has won growing respect. HMO's bring into a single organization the physician, the hospital, and the clinic. They are expected to prove an efficient method for providing comprehensive health service in a wide range of settings. The National Health Insurance Partnership Act proposal would give families a choice between this type of organization and the traditional fee-for-service financing.

The Social Security Amendments of 1972, P.L. 92-603, provide that Medicare beneficiaries may choose to have their covered health care provided through a Health Maintenance Organization (a pre-paid group health or other capitation plan that meets prescribed standards). Under this option the choices available to Medicare beneficiaries for securing health care services will be increased and, hopefully, by stimulating competition among various sources of health care, contribute to more efficient and economical delivery of services generally for all patients."

4. "P.L. 92-603 included other provisions to extend and liberalize the Medicare program.
- a. This legislation contains provisions for extending Medicare protection to the disabled under age 65 who have been receiving Social Security disability benefits for 24 months or longer.
 - b. P.L. 92-603 will broaden the extent of post-hospital care available to older persons under Medicare.

As a consequence, some of those patients who formerly would have had to pay for this care themselves will now be entitled to medicare benefits.

- c. This legislation also relieves beneficiaries from liability in certain situations where Medicare claims are disallowed and the beneficiary is without fault, including cases where the disallowance is based on determinations that the services were not medically necessary or did not meet level-of-care requirements. The legislation further provided for advance approval of post hospital extended care and home health care coverage. These provisions should substantially alleviate the hardship of retroactive denial of benefits."
5. "In connection with the development of the National Health Insurance Plan, consideration will be given to coverage issues which are directly applicable to the concerns expressed by the Delegates, relative to areas not now covered by Medicare."
 6. "The Administration has proposed reform of cost sharing provisions in the Medicare program that will result in significant cost reductions for those with longer term illnesses and provide better designed incentives for appropriate utilization of medical services."
 7. "This Administration is seeking ways to curb inflationary forces that have forced health costs to increase -- thus affecting the income position of many older Americans."
 8. "Training of state nursing home inspectors. Four week, university-based training provided for 1,000 of the nation's State Health facility surveyors as of March 1, 1973. The remainder are expected to be reached within Fiscal Year 1973."
 9. "Training of medical and allied health professionals working in nursing homes. Federally-sponsored programs operated in conjunction with national professional associations and nursing home groups are programmed to reach 20,000 of the nation's 500,000 long term care personnel this year. Primary focus is on physicians, nurses, nursing home administrators and patient activity directors."
 10. "The Department of Health, Education and Welfare is currently financing the training of nursing home personnel to recognize and deal with emotional problems faced by patients in long-term care institutions."
 12. "The Administration on Aging and the Health Services and Mental Health Administration have entered into a formal agreement to improve delivery and coordination of health and social services for older persons.

This agreement provides for joint consultation and sharing of experts, and coordination of planning, funding and implementation of programs."

B. Response of Study Panel

The Administration has rejected a comprehensive national program for health care, as proposed by the Conference, and instead has offered separate programs for the poor, the aged and other groups in the population.

There have been a number of more comprehensive programs introduced in the Congress, including one embodying the Conference recommendations regarding funding and with no deductibles, co-payments and co-insurance. However, no action has been taken to date.

The need for strong Administration and Congressional action thus still exists, to establish a comprehensive national program as proposed by the Conference Delegates.

It is regrettable that none of these recommendations has been implemented.

To the contrary, in the Medicaid program, there have been cut-backs in fund authorizations, the extension of new deductibles and co-payments, and the introduction of premiums, directly in opposition to the Conference recommendation. The Administration's proposals to increase medicare deductibles and cooperative insurance also run directly counter to the Conference's recommendation to eliminate such out-of-pocket payments.

RECOMMENDATION XI

We support the establishment of a special committee of the House of Representatives which will devote its attention to all social and economic problems of the aged, including income, health, housing, and other needs areas reflected in the organization of this Conference.

A. Administration Response

No direct response, although report cites that action to be taken is responsibility of House of Representatives.

B. Response of Study Panel

Initiative for this action rests with the members of the House of Representatives. Since no action has been taken, the panel urges the House of Representatives to give early consideration to the formation of a Special Committee on Aging.

RECOMMENDATION XII

Our Nation has the resources to effectively carry out the proposals made by this Section provided there is a re-ordering of national priorities.

A. Administration Response

"Between 1969 and 1974, outlays for Federal human resources programs have increased by 97 percent, while total budget outlays have grown by only 46 percent. As a result, human resources spending now accounts for close to half the total budget dollar, compared with just over one-third of the total at the time I (the President) took office."

B. Response of Study Panel

Basic to the income recommendations of the Conference is a reordering of our national priorities to recognize the appropriate position the elderly should occupy in our society.

But this will not be achieved without a more specific commitment on the part of the Administration and the Congress to the goal of a standard of income adequacy that would endure the aged a position of independence and dignity and permit them to fully share in the rising living standards of the American nation.

NUTRITION

NUTRITION

PREAMBLE

The Section on Nutrition of the 1971 WHCoA succeeded in complementing momentum already established in this decade by the recommendations promulgated early in 1970 of the Panel on Aging of the December, 1969 White House Conference on Food, Nutrition, and Health. These WHC's via both their nationwide grassroots pre- and post-conference activities in the nutrition field and their forthright recommendations developed while in session in Washington, focused world-wide attention on the nutritional needs of the aging and of those already old. Moreover, they stressed the fact that adequate nutrition means far more than food and its consumption.

Adequate nutrition means in addition the distribution, availability, acceptability and utilization of information, services and facilities in the fields of health, income, education, housing and transportation. It implies public and private sector responsibility for safeguarding the quality of institutional food and service and for guaranteeing the wholesomeness, the labelling and the economy (i.e., the highest quality for the lowest unit cost) of the nation's food supply. It entails utilizing every possible means of protecting the aging and the aged of all economic levels from exploitation by unscrupulous commercial interests, food faddists and medical quacks. Finally, if present momentum is to continue and its mass and velocity to increase, substantial increases in public and private sector allocations for research and development in nutrition and aging are absolute necessities.

The Study Panel on Nutrition is convinced that the recommendations of the 1969 WHCFNH reinforced by the recommendations of the 1971 WHCoA led to the Legislative and Executive Branches' authorizing the Title VII Amendment to the Older Americans Act (Nutrition Program for the Elderly) which has in turn stimulated unprecedented interest and action in nutrition and aging in all jurisdictions. While Title VII has not been fully implemented because of the presidential veto of the FY '73 DHEW appropriation bill, all jurisdictions, working with AoA continuing resolution funds, have designated agencies for carrying out the intent of the Title VII program. A compromise agreement, announced April 18, 1973, between the Administration and Congress assures prompt Federal funding and hence implementation at the State level.

While a vast step forward, especially since its regulations incorporate some of the recommendations of the WHCoA's Section on Nutrition, Title VII must be regarded as Federal capacity building only. It will, even when viewed with maximum optimism, serve less than 8% of those in need. The remainder will be dependent on State, regional, community and voluntary efforts (which have already been stimulated by the Title VII concept) for the fulfillment of their total nutritional requirements.

Title VII regulations lack any system for biomedical evaluation of results of the program. This is a serious deficiency and one worthy of prompt attention by the Domestic Council Committee on Aging, especially since the Title VII program nationwide affords an opportunity without precedent to derive information not only on methodology of providing good nutrition but also on the biologic, psychologic, sociologic and economic influences of improved nutrition on the aged.

In conclusion, it must be stated unequivocally that adequate nutrition for the aged can not be effectively provided, managed, regulated or evaluated by any single agency of the public or private sector or by multiple agencies operating independently in an uncoordinated fashion. Coordination if not integration of all nutrition-related services for the aged is an essential component of Title VII, programs derived from it, and all other nutrition programs for the elderly.

RECOMMENDATION I

It is recommended that the Federal Government allocate the major portion of funds for action programs to rehabilitate the malnourished aged and to prevent malnutrition among those approaching old age. However, adequate funds should be allocated for a major effort in research on the influence of nutrition on the aging process and diseases during old age in order to give meaning and impact to the action programs. Appropriate research findings must be made available to all action programs.

Since approximately one-half to one-third of the health problems of the elderly are believed to be related to nutrition, we recommend that pilot programs be set up for evaluation of the nutritional status of the elderly.

A. Administration Response

1. "Provision has been made for a national income floor for older persons -- an action which the President first recommended to the Congress in 1969."
 - a. "The Social Security Amendments of 1972 include provisions which will replace the present Old Age Assistance program with a federally financed program of Supplemental Security Income which will provide a guaranteed minimum monthly income of \$130 for an individual and \$195 a month for a couple."
 - b. "On July 1, 1972 the President signed legislation to make social security benefits "inflation proof" through a cost-of-living escalator and a liberalization of the earnings test."
 - c. "This Administration agrees with the views of delegates to the White House Conference on Aging that private pensions are an important source of income for the elderly and firm action must be taken to assure that private pension plans operate fairly and effectively. In his March 1972 message to Congress the President supported the view of the Conference saying, "the long range answer to adequate income for the elderly does not lie in government programs alone; it also requires expansion and reform of our private pension system."

2. "The President asked Congress for the full authorization of \$100 million to implement the Nutritional Program for the elderly (Title VII of the Older Americans Act).

The program provides for formula grants to designated state agencies to establish local nutrition programs which provide low cost, nutritious meals daily at least five times a week to older persons 60 years of age or older and their spouses. The Act, and regulations and guidelines pursuant to the Act, place emphasis on the provision of meals to low income and to minority group elderly."

3. "What we need is a comprehensive, coordinated research program, one which includes disciplines ranging from biomedical research to transportation systems analysis, from psychology and sociology to management science and economics."
4. "Various research and demonstration projects underway in the area of nutrition should benefit the aged. To improve nutritional teaching in medical schools, the Center for Disease Control is now working on curriculum development with deans of various training institutions."
5. "[The Administration on Aging] is studying ways and means of improving nutrition services for the elderly."
6. "The hospitals and clinics of the Veterans Administration are conducting hundreds of research projects into the aging processes and chronic diseases. Of special concern to older persons are the agency's investigations in diabetes and diabetic retinopathy, endocrinology of the aging and aging bone metabolism."
7. "There is in existence a Technical Advisory Committee on Aging Research. This Committee, made up of outstanding leaders from outside government, will make recommendations to the Administration directed toward the development of a meaningful program of research in aging."
8. "In order to increase the effectiveness of the NIH activities in this area, the decision has been made to create a Center for Aging Research within the National Institute for Child and Health and Human Development. This center will coordinate the activities of the Gerontology Research Center, a research facility for Government scientists conducting aging research, and the Adult Development and Aging Branch through which funds pass to support non-Governmental scientists working on aging. The combined total of their expenditures is over \$12 million per year."
9. "In order to promote efficiency and effectiveness of nutritional activities, the Center for Disease Control has been given lead agency responsibility for assuring the inclusion of nutritional programs where necessary in medical care programs administered by the Health Service and Mental Health Administration. This agency has been working with the Department of Agriculture in planning better ways to monitor and evaluate the effects of food distribution on health and nutrition."

B. Response of Study Panel

This recommendation calls for both increased funding of nutrition programs and research on the influence of nutrition on the aging process and disease during old age in order to give meaning and impact to the action program. The 1972 Older Americans Act Amendments, now vetoed, would have fulfilled the recommendation for the funding of a new nutritional program directed toward those areas of high density of low income and minority populations. It is urged that legislation be reenacted by the Congress in such form that the President will find it possible to approve and thus work toward achieving his stated goal of improving the nutritional status of millions of elderly Americans. Title VII funding represents Federal capacity building for State, regional and community volunteer efforts to meet the nutritional requirements of all aged persons. Among the strategies to work toward this goal would be allocation of Federal Revenue Sharing funds and State funds to be reallocated as a result of Federal assumption of the funding of Public Assistance. In addition, it is hoped that Title VII implementation will encourage voluntary agencies to expand their present programs.

The Older Americans Act Amendments (as well as the vetoed National Institute of Aging Act) contains provisions which could result in better evaluation of action programs including Title VII and more research on the effect of nutrition upon the aging process and the diseases of old age. Subsamples of beneficiaries of the Title VII program could be evaluated using biomedical, psychological and sociological methodology to determine the input of the program.

Although the Administration points out that some programs of the Veterans Administration, and the Center for Disease Control have been providing information about nutrition, disease, and aging, they have been too poorly funded and under-emphasized to satisfy the recommendation that a major effort in nutritional research be funded. Furthermore, the programs of the Center for Disease Control are scheduled to be phased out June 30, 1973, leaving a serious gap in lead agency responsibility for assuring the inclusion of nutritional programs where necessary in medical care programs administered by the Health Services and Mental Health Administration. Nor has there been any indication that the proposed Center for Aging Research which would be set up in the National Institute of Child Health and Human Development will make nutrition related research one of its priorities.

The Study Panel therefore urges the Administration to take steps to provide through legislation that a significant proportion of the funds allocated to the Center on Aging Research be allocated to studies of nutrition and the relationship of nutrition to the aging process the disease of old age. Likewise, the Panel urges that the Technical Advisory Committee for Aging Research, which is charged with stimulating and conducting research throughout the Federal Government, give attention

to the needs for basic research on nutrition and to the dissemination of such research information to those responsible for action programs such as envisioned in the 1972 Older Americans Act Amendments and in the food distribution programs of the Department of Agriculture. The Study Panel also urges Congress to review and pass the vetoed Research on Aging Act establishing a National Institute on Aging.

RECOMMENDATION II

The Federal Government should: establish and more strictly enforce high standards with specific regulations for the food and nutrition services provided by institutions and home care agencies that receive any direct or indirect Federal funds; require a high level of performance from State government enforcement agencies; and, when necessary, provide financial assistance to bring non-profit organizations up to standard. These standards should include such important areas as quality and nutritive value of food, methods of handling, preparing, and serving foods, the special dietary needs of individuals, and the availability of, and, accessibility to, nutritional counseling.

It is recommended that nutrition services and nutrition counseling be a required component of all health delivery systems, including such plans as Medicare, Medicaid, Health Maintenance Organizations, home health services, extended-care facilities, and prevention programs.

A. Administration Response

1. See #8, under Recommendation #1.
2. "The nutrition program emphasizes the provision of group meals at sites preferably within walking distance of the older persons' residences. The law also provides for supporting social services to the elderly participants in the nutrition program. These may include an active outreach program to find the isolated and withdrawn and bring them into the program if they so choose; necessary transportation services where appropriate, escort services, information referral, counseling, nutrition education and recreation incidental to the project."

3. "The Veterans Administration is testing ways to assure that adequate, nutritional meals are available to the elderly."
4. "The Veterans Administration has been investigating meals-on-wheels type programs and is developing ways in which such programs may be initiated and extended. There is considerable expertise among Veterans Administration professional dietitians who provide dietary assistance to both inpatients and outpatients in agency operations. They also participate in inspection of community nursing homes that are providing accommodations for veterans under contract with the Veterans Administration."

B. Response of Study Panel

The Federal Government is in agreement with the recommendation that high standards and stronger regulatory measures are needed to insure the quality and nutritional value of food provided in various nutrition programs both within institutions and in community settings. The language used in the Nutrition Program for the Elderly (Title VII of the Older Americans Act) and the guidelines developed by the Administration on Aging, suggest that the Nutrition projects would have met the standards visualized in the recommendation. It is hoped that equivalent standards will be applied to other Federally funded projects.

Regulations and standards however admirable, will not improve the actual quality of nutritional services if inspection and enforcement are not equally tough. This will require more and better trained personnel, but as a last resort the Federal government may have to use leverage such as the withholding of funds or unfavorable publicity to achieve compliance.

The Study Panel fears that a great deal of time and money can be expended in evaluating nutrition programs where inadequate performance may be due only to lack of resources. It should be made imperative that before nutrition grants are approved, a critical evaluation will be made of the applicant organization's resources and management capability.

The last part of this recommendation that nutrition services and nutrition counseling be a required component of all health delivery systems is perhaps the most important of all the recommendations on nutrition. Substantial progress has been made under Title XIX under the Social Security Act toward establishing standards for dietetic services for nursing homes and intermediate care facilities. Unfortunately no such progress has been made under Title XVIII of the same act in regard to nutritional services in home health agencies.

RECOMMENDATION III

Government resources allocated to nutrition should be concentrated on providing food assistance to those in need. However, a significant portion of these resources should be designated for nutrition education of all consumers, especially the aged, and to the education by qualified nutritionists of those who serve the consumer, including teachers in elementary and secondary schools, doctors, dentists, nurses, and other health workers. This can be accomplished immediately by increasing personnel and funds in existing agencies and institutions.

A. Administration Response

1. "The President asked Congress for the full authorization of \$100 million to implement the Nutritional Program for the Elderly (Title VII of the Older Americans Act). The Act provides for escort services; information, referral, counseling; nutrition education; and recreation incidental to the project."
2. "The Veterans Administration and the Department of Agriculture have initiated steps to improve the nutritional information, education and delivery systems."
3. "Extension Service Nutritionists at the Federal and State levels have begun accelerating their consumer nutrition programs, giving special emphasis to the aged consumer.

One section of a nationwide nutritionist workshop held on November of 1972 will deal with improving counseling and information for the aged."
4. "Special informational material on nutrition is being developed for the Spanish speaking community."

B. Response of Study Panel

It is hoped that the 1972 Amendments to the Older Americans Act will be reenacted. The Nutrition program for the Elderly as set out in Title VII of the Older Americans Act not only provided for nutritious meals but it also made provision for education and counseling about nutrition as one of the essential components of the program. The proposed group settings for the meal service would provide a natural situation for teaching older people something about proper nutrition. It is unlikely, even if the Older Americans Act Amendments become law, that the group nutrition programs will reach everyone needing nutritional services.

In terms of future benefits it would seem that there would be significant pay-off in any investment made for nutrition education of all consumers regardless of age or economic status. The Study Panel therefore, reiterates the delegates' recommendation in its urging that elementary and secondary school teachers, doctors, dentists, nurses have sufficient training in nutrition to be able to teach the principles of good nutrition to the people they teach and serve. The Study Panel urges that the action already underway to increase and improve nutritional education of professional workers such as that proposed for the medical schools and the education of more consumers about good nutrition practices being attempted by Extension nutritionists at the state and local levels be not only continued but expanded. This implies a reassignment of the Center for Disease Control nutritional program responsibility by the Counsellor of Human Resources. The efforts of the Department of Agriculture to test ways of assuring better nutritional information, education and delivery systems deserves the strongest possible support of the Congress, the Administration and the public. In addition efforts should be undertaken by the Office of Education to strengthen nutrition education programs.

In light of the Administration's proposal for special revenue sharing in Education, it is incumbent upon the Office of Education to develop these programs in the near future, so that they may serve as models for states and localities once the Revenue Sharing proposal is enacted.

RECOMMENDATION IV

Federal Government policy must offer the older person a variety of options for meals, but should stress the favorable psychological values and the economies inherent in group feeding. The policy should require all Federally assisted housing developments to include services or to insure that services are available for the feeding of elderly residents and for elderly persons to whom the development is accessible. Where a meal is provided, it should meet at least one-third of the nutrient needs of the individual. The policy should also require the provision of facilities (including transportation) for food purchase and meal preparation within each household of the development. In addition, Federal policy should encourage and support community agencies to provide facilities and services for food purchase, meal preparation, and home-delivered meals (often called Meals-on-Wheels) for eligible persons living outside housing developments or in isolated areas.

A. Administration Response

1. "The Nutrition Program [proposed in the Older Americans Act 1972 Amendments] emphasizes the provision of group meals at sites preferably within walking distance of the older persons' residences."
2. "The Secretary of Health, Education and Welfare has issued regulations under the new Nutrition Program for the Elderly which are designed to assure, in accordance with the law, that nutrition projects are established and administered with the advice of persons competent in the field of nutrition, of older persons who themselves will participate in the program, and of persons who are knowledgeable with regard to the needs of older persons."
3. "The Administration on Aging is working with the Department of Transportation to develop a joint transportation demonstration plan which could be used to increase older persons' access to community services."
4. "The President, in keeping with his announcement at the White House Conference on Aging, has directed that all Federal grants which provide services for older persons also ensure that the transportation needed to take advantage of these services is available."

5. "...regulations issued by the Administration on Aging under the law establishing the Nutrition Program for the Elderly require that States must plan for a transportation component to assure that older persons have access to food and nutrition programs supported by Federal funds."
 6. "Recently the Department of Agriculture has sponsored the Drive to Serve Program. There are many elderly persons who are eligible to receive donated foods, but because of illness, disability or transportation problems, they are unable to get to the distribution centers. Through the cooperative efforts of the Department, State and local welfare authorities, and adult and high school volunteers, Drive to Serve provides a delivery system of foods to these senior citizens in many communities."
 7. "Home-delivered meals (Meals-on-Wheels) may be purchased with Food Stamps by handicapped, elderly persons who are unable to prepare their own meals."
 8. "Donated foods are available to nonprofit, tax-exempt institutions which provide home delivered meals to the extent of the needy served who are not using stamps to pay for meals. Also included in the Food Stamp Program are free food stamps for the extremely poor."
 9. "The Veterans Administration has been investigating Meals-on-Wheels type programs and is developing ways in which such programs may be initiated and extended."
- B. Response of Study Panel

Title VII of the Older Americans Act for the Nutrition Program for the Elderly does stress the virtue of group meal settings. It is hoped that the act will be reenacted and money appropriated in the near future. The older people served in the nutrition projects will benefit not only from regular access to substantial, balanced meals but also will benefit from having to get out of their homes and be with other people.

While the Administration and Congress have accepted the spirit of the recommendation, to include food services and facilities in federally supported housing projects, neither has dealt with some of the problems which have developed following passage of the 1970 Congregate Housing Act, problems over and above those created by the veto of the 1972 Amendments to the Older Americans Act. In projects built under the provision of Section 236 (rental housing developed by private sponsors with interest subsidy and rent supplements to assist in serving the lower middle income elderly) and Section 221 (rent supplement permitted on all units), the monthly charge must cover both rent and food service. The occupants must be able to sustain the break-even cost of operation. If tenants are selected on the basis of ability to defray food and rent costs, those most in need may not be eligible.

In low-rent public housing, while space and equipment for food preparation may be charged to the administrative cost of the congregate housing development, no provision exists for covering a deficit in food costs. HUD policy dictates that proposals for congregate housing will not be funded unless plans guarantee continuity of food service. Broadly based, long term planning at the community level is therefore essential.

As noted elsewhere, implementation of the recommendation that meals provided in housing developments provide at least one-third of the nutrient needs of the individual requires the supervision of professionally trained nutritionists. Quality control over any Title VII-like programs is absolutely essential to the success of the projects. Hence, adequate technical assistance by qualified professional personnel must be built into the regulations governing all feeding projects for the elderly.

RECOMMENDATION V

It is recommended that the Federal Government assume the responsibility for making adequate nutrition available to all elderly persons of the United States and its possessions.

A. Minimum adequate income (at least \$3,000 per single person and \$4,500 per couple) must be available to all elderly. Until money payments are increased above the minimum level, existing food programs should be strengthened, including nutrition education, to meet the needs of the elderly. Therefore, it is recommended that:

- In addition to store purchases of food, food stamps be used for the purchase of meals in participating restaurants, schools and community settings, and any approved home delivery systems.*
- The Food Stamp Program must be structured to conform to the USDA low-cost food plan at no increase in the cost of food stamps to the recipient.*
- As long as low income Social Security recipients are on fixed incomes, they should be eligible for self-certification for food stamps and/or public assistance cash grants.*
- Food stamp applications should be mailed with Social Security checks and stamps sent to older persons through the mail or by some other efficient, practical, and dignified distribution method.*
- The purchase of food stamps should be encouraged and facilitated by providing the first food stamp allotment without cost to the recipient, by permitting more frequent purchases and by distributing stamps at senior citizens centers.*

--The approximately 1,000 counties in the United States still using the commodity program must switch by December 31, 1972, to the food stamp program for the individual feeding of the elderly. Until this is accomplished, the Federal donated food should be made nutritionally appropriate, in packages of suitable size, and, at readily accessible places.

B. It is recommended that the equivalent of a National School Lunch Program be established for senior citizens, not to be limited to school facilities or to low income persons. Basic components of the program should be:

--All United States Department of Agriculture commodities should be fully available on the same basis as the school lunch program.

--Funding should provide for adequate staff, food supplies, equipment, and transportation.

--Elderly people should be employed insofar as possible.

--Auxiliary services should be built in, including recreational and counseling programs.

C. It is recommended that nutrition specialists already in the field direct the recruitment of volunteers and/or paid part-time aides from among the elderly and train them to teach sound nutritional practices to older people in groups and in their homes. Qualified social workers should be utilized in getting client acceptance of the services being made available.

A. Administration Response to Part A of Recommendation V

1. "Administration Response: The Administration supports the recommendations of the White House Conference on Aging that the nation marshal its resources to provide adequate nutrition to older Americans."
2. "Beginning in January, 1974, the new Supplemental Security Program administered by the Social Security Administration will begin providing cash payments to the low income elderly, to take the place of the welfare check and the food stamps they now receive. In many States, the Federal payment will be higher than the present amount received from a combination welfare and food stamp program, and recipients will have the freedom to choose how much of their income will go to food and how much for other purposes."
3. See #2 under Recommendation 1.
4. See #7, 8 under Recommendation 4.
5. "Reforms have been made in the Food Stamp and commodity distribution programs of the Department of Agriculture. National eligibility standards have been set for food stamp eligibility, and benefits are increased to keep pace with the cost of living."
6. "Included in the Food Stamp Program are free food stamps for the extremely poor. "
7. "Virtually every county in the Nation now offers either the Food Stamp or the Food Distribution Program; in early 1969, nearly 500 counties offered neither. In all, 2.5 million older Americans benefit from at least one of these programs."
8. "The President launched Project FIND to seek out and enroll eligible older Americans in existing food assistance programs."
9. "The use of volunteers in Drive-to-Serve projects is being encouraged by the Department of Agriculture in its food assistance out-reach efforts."

Administration Response to Part B of Recommendation V

1. See #2 under Recommendation I.

Administration Response to Part C of Recommendation V

1. No direct response.
2. See #4 under Recommendation III.

3. "Project FIND, working across department and agency lines, as well as with State and local government agencies--while enlisting the support of private volunteers--exemplifies the commitment this Administration has to marshalling all available resources of the Nation in carrying out the recommendations of the Conference delegates."

"The American Red Cross organized a nation-wide volunteer effort, with personal contact by over 35,000 volunteers, ...over 1,000 State and local government organizations and private voluntary groups, together with Federal employees and Federally-funded volunteers, were alerted to Project FIND and asked to participate."

B. Response of Study Panel

Since food purchases are a compressible item (however painful) in a family's or individual's budget, the nutrition of the elderly suffers when income is limited. The recent increases in Social Security benefits have improved a bad situation, but the money now provided for people whose only income is from Social Security is still inadequate. Although the retirement test has been liberalized, the panel believes that a 50 percent reduction in Social Security benefits when the income exceeds \$2100 seems unjust.

If recipients of Meals-on-Wheels can pay for meals with food stamps; it would seem feasible that food stamps could be used to purchase meals in restaurants or group nutrition projects. The use of food stamps to purchase meals in certain restaurants and cafeterias would not require complicated regulation or supervision and would allow older persons a more independent way of obtaining meals and perhaps be of some advantage to the restaurant management in achieving economies of scale.

The intent of Project FIND to seek out and enroll eligible older Americans in existing food assistance programs is commendable. Much has been accomplished through increased food stamp and commodity distribution programs.

The Social Security Amendments of 1972 (P.L. 92-603) increased the amount paid in the three adult public assistance categories--old-age assistance, aid to the blind, and aid to the permanently or totally disabled. However, as of January 1, 1974, recipients of SSI benefits will no longer be eligible to participate in the food stamp and commodity distribution programs. The Study Panel expressed considerable concern that the increase in cash benefits may not balance the loss of food purchasing power provided by food stamps. Implementation will free state funds now allocated for public assistance in many states with standards below the proposed Federal level. These funds should be utilized for state sponsored income supplementation or nutritional services.

States with present standards above the proposed Federal level should maintain their previous standards by state supplements to the Federal income payment. Only by these measures will previous buying power of older persons be maintained.

The Panel was disappointed that no action had been taken to provide self-certification of eligibility by low-income Social Security recipients for food stamps or to allow mailing of applications for food stamps with Social Security Checks. Given the lack of mobility of many older persons it would seem that they would be more likely to avail themselves of food stamps and other assistance if they were not required to travel from their homes or could get them from other than the Welfare office.

The funding of the Nutrition Program as outlined in Title VII of the Older Americans Act would fulfill the intent of Part B of Recommendation V that the equivalent of a school lunch program be established for senior citizens. It is hoped that the Older Americans Act with Title VII will be reenacted and adequately funded in the near future.

The first part of this recommendation, that nutrition specialists already in the field should recruit volunteers and/or paid part-time aides among the elderly and train them to teach sound nutritional practices to older people, was incorporated in Title VII, Nutrition Program for the Elderly. This provision should be retained in the Legislation when it is reintroduced.

The Panel observed that expanded nutrition programs by the U.S. Department of Agriculture and Project FIND and implementation of the first part of Part C of Recommendation V would result in client acceptance of the services being made available. Certainly all means must be used to encourage people to use the programs available to them.

RECOMMENDATION VI

The responsibility for producing quality food rests with the food industry. However, it is the responsibility of the Federal Government to establish and enforce such standards as are necessary to insure the safety and wholesomeness of our national food supply, as well as improve nutritive value. To do this requires more personnel and funding. State requirements that meet or exceed Federal standards must be established, implemented, and monitored with Federal support. Particular attention should be given to both nutrient and ingredient labeling of food products as a means of achieving greater consumer understanding. An inclusive list of the ingredients in any processed food should be made available by the manufacturer to the consumer on request.

A. Administration Response

1. "The Administration has taken several actions to protect elderly consumers in the area of nutrition standards... (by developing) program guidelines which set forth minimum nutrition standards for local projects sponsored under the program. This is to insure that consumers receive meals that meet their particular dietary needs and meet their nutritional requirements."
2. "At the urging of the Office of Consumer Affairs, manufacturers and retailers may adopt standard nutritional labeling and open date (i.e., date when a commodity should no longer be offered for sale). A study on the feasibility of requiring open date is underway in the Department of Health, Education and Welfare."
3. "Special informational material on nutrition is being developed for the Spanish speaking community.

Labels for donated foods are now available in Spanish. To assist other ethnic groups, the Department of Agriculture is introducing a new system of label improvements including illustrative mixing instructions, nutritive information and color sketches of container contents."
4. "The Community Health Service is working closely with the Social Security Administration to strengthen dietetic service standards for hospitals and extended care facilities under Medicare. The Service is also assisting the Department of Housing and Urban Development draw up dietary guidelines for residents in congregate housing for the elderly, handicapped and ailing."
5. See also #7 under Recommendation 1.

B. Response of Study Panel

Regulations proposed for the Title VII Nutrition Projects would provide high standards on the preparation of the meals. Title VII even if passed, however, does not cope with the entire national food supply which was the intent of the recommendation. The Office of Consumer Affairs is to be encouraged and supported in its efforts in getting manufacturers and retailers to adopt standard nutritional labeling and open dating. Although not mentioned in the Administration Response, the new regulations formulated by the Food and Drug Administration requiring nutrient and ingredient labeling are to be commended. These will be especially helpful in the development and coordination of nutrient education at all grade levels including adult education. A program of nutritional education utilizing these tools must now be developed.

In looking for means to achieve the goal of a safe and wholesome food supply the Study Panel reiterates the observation in the recommendation that more funding and personnel are needed for enforcement at both the State and Federal levels. Secondly, all available means must be employed to educate the public on sound food purchases. Thirdly, the Study Panel sees the need for responsible, dynamic leaders chiefly from the private sector to work for higher standards in food processing and preparation, and nutrition education for the general public and for teachers and personnel in the health field.

PHYSICAL & MENTAL HEALTH

Study Panel Report

PHYSICAL AND MENTAL HEALTH

Preamble

The development over time of a coordinated, comprehensive health services system which would ensure continuity of both short and long-term care, in and out of institutions, for the total population, is the prime responsibility of the U.S. Department of Health, Education, and Welfare.

Such a comprehensive health services system requires that the full spectrum of health services available be readily assembled, of high quality, and delivered with concern for the dignity and choice of the individual. Coordination at various levels of care is necessary to provide efficiency and effectiveness.

To be comprehensive, the system must provide:

1. assessment of health
2. education to preserve health
3. appropriate preventive and outreach service
4. all physical, mental, social, and supportive services necessary to maintain or restore health
5. rehabilitation
6. maintenance and long-term care when disability occurs.

The Secretary should designate responsibility for the development of this system to the Assistant Secretary for Health and Scientific Affairs. Such a system will not evolve from fragmented programs arising in an uncoordinated fashion from various ends of the Department.

Unless this specific responsibility is designated to the Assistant Secretary, we cannot possibly make the progress toward a comprehensive and cost effective program which is compatible with our national aspirations.

RECOMMENDATION I

Health care for the aging must be provided as an integral part of a coordinated system that provides comprehensive health services to the total population; but immediate and special consideration and emphasis must be given to the problems of, and services for, the aging.

A. Administration Response

1. "The Administration has made Recommendations and taken actions which are designed to bring about a marked improvement in the delivery of health services to all of our citizens, including older persons."
 - a. "This Administration is providing assistance for the demonstration of the Health Maintenance Organizations concept."
 - b. "The President, in order to make available the services of Health Maintenance Organizations to a large number of older persons, recommended to the Congress that Medicare recipients be enabled to join such programs."
 - c. "The Administration, through the National Health Service Corps, has funded projects to demonstrate the feasibility of attracting and retaining health professionals for services with minority groups and in rural areas."
 - d. "The Administration on Aging and the Health Services and Mental Health Administration have entered into a formal agreement to improve delivery and coordination of health and social services for older persons."
2. "President Nixon has submitted a plan to the Congress for strengthening and expanding service delivery programs under the Older Americans Act."
3. "Under the Adult Services provisions of the Social Security Act, the Federal government, within a ceiling for each State related to an overall national ceiling of \$2.5 billion, provides funds to pay 75 percent of the cost of services that enable older persons receiving public assistance to remain in their homes or return to their residence after hospitalization."
4. "Under General Revenue Sharing, substantial sums could be used by both State and local governments to support coordination and comprehensive service programs for older persons."

5. "HEW presently has under consideration Allied Services legislation for transmission to Congress. The objective of such legislation would be to assist integrated planning and delivery of human resource programs."
6. "The Administration proposed a national health insurance plan to the 92nd Congress. This plan is now under review and a new proposal will be submitted to the 93rd Congress."
7. "The President has launched and followed-up on a vigorous program to assure that nursing home patients get the kind and quality of care they need and deserve."
8. "The Social Security Amendments of 1972, P.L. 92-603, authorized an experiment dealing with the possibility of eliminating or reducing the 3-day-prior-hospitalization requirement."

B. Response of Study Panel

At this point in time, there has been little movement toward the development of a coordinated, comprehensive system of health services, exclusive of the movement to support the concept of health maintenance.

Our knowledge of the Administration-proposed plan for national health insurance suggests that while some provision is made to give special attention to caring for the aged and the poor, elements of that plan would restrict the access of many in these groups to needed health services, including mental health care. The Administration plan addresses itself to the financing mechanism, rather than to alterations in the delivery system. It needs to address both issues.

The Panel is concerned that while P.L. 92-603, as recently signed by the President, extends medical benefits, under Medicare, to some, it contains certain regressive measures which will effectively preclude many from securing necessary health care.

While Medicare coverage is now to be available to the disabled and those requiring kidney transplants or dialysis, those new provisions under Medicaid which increase the costs to patients and which remove the requirement that States must move toward a comprehensive Medicaid program, are steps which move us away from the goal of achieving comprehensive health services for all persons.

The Panel also recognizes the potential for the delivery of coordinated, comprehensive services, including certain health support and home health services, which could have been realized through the proposed Older Americans Comprehensive Service Amendments of 1972. The Panel urges that such Amendments be enacted.

As to the fragmentation which currently characterizes our system of health care, the Panel again states its concern that movement toward the goal expressed in the Recommendation has been miniscule. The Panel contends that the goal can, and must be, realized.

RECOMMENDATION II

A coordinated delivery system for comprehensive health services must be developed, legislated, and financed to ensure continuity of both short- and long-term care for the aged.

A. Administration Response

1. See #1, 2, 3, 4, and 5 under Recommendation I.
2. "The Administration is providing assistance for the demonstration of the HMO concept."
3. "The Administration has urged Congress to approve a program to aid in the demonstration of HMO's that would provide comprehensive health care service."
4. "The Administration, through the National Health Service Corps, has funded projects to demonstrate the feasibility of attracting and retaining health professionals for services with minority groups and in rural areas."
5. "AOA and the Health Services and Mental Health Administration have entered into a formal agreement to improve delivery and coordination of health and social services for older persons."
6. "More than 400 community mental health centers, with Federal assistance, are offering a variety of out-patient services to citizens of all ages."
7. "NIMH has underway an evaluation of its research, training, and service projects for older people, with special emphasis on community health center programs."
8. "The Office of Nursing Home Affairs has initiated studies of long-term care in three essential areas: the quality of institutional care, the alternatives to institutional care, and ongoing data collection and analysis. The quality study will focus upon the development, testing, and evaluation of measures of the performance of institutions, and the assessment of the outcome to patients of care within institutions."
9. "The National Center for Health Services Research and Development. This center is engaged in a wide range of research concerning older persons. For example, special research efforts by the Center, in conjunction with the National Center for Health Statistics, and the Community Health Service, will be geared towards defining quality of care in nursing homes, monitoring nursing home utilization, and measuring the effectiveness of alternatives to institutional care."
10. "The Veterans Administration is carrying out a program to improve the quality of nursing home care in the institutions under its control."
11. "The Veterans Administration continues to develop new techniques to help older persons remain independent."

B. Response of Study Panel

Any consideration of long-term care of the aged must take into consideration the intimate relationship between health and other social welfare services. Whereas there will always be a segment of the population which will require institutional care, there is an even larger segment which is capable of and prefers independent living arrangements particularly where appropriate supportive services are available within the community. Unfortunately, in the majority of our present communities there is little coordination between existing health and social service agencies or programs. In many communities, such programs are non-existent as they pertain to the human needs of the aging.

Provisions of P.L. 92-603 and initiating of the Department of Health, Education, and Welfare to authorize and conduct studies and demonstration projects including such alternatives to institutional care as day hospital services to the elderly, and homemaker services, is a positive step toward the insurance of provision of services supportive of dignified, independent living for those of our aged who so prefer.

Comprehensive Health Planning proposed modifications of the Older Americans Act to upgrade local planning efforts for the individual and measures such as the proposed Allied Services Act all offer opportunities to develop systematic approaches to the health needs of the elderly. However, special concern must be shown to include both the elderly and those who provide services to them in these planning mechanisms.

Administration initiatives to reduce support of community health programs are contrary to the intent of this recommendation.

The development in P.L. 92-603 of the categories of skilled nursing facilities and intermediate care facility offer a significant opportunity to upgrade the care of those who are in need of such services. Critical to this process will be the development of regulations calling for quality care in these programs.

RECOMMENDATION III

A comprehensive health care plan for all persons should be legislated and financed through a national health plan. Pending the achievement of such a national health plan, the complete range of health care services for the elderly must be provided by expanding the legislation and financing of Medicare. Such expanded financing should be accomplished by means of a combination of Social Security trust funds with a greatly expanded use of general revenues. Such expansion of Medicare should include elimination of deductibles, co-insurance, and co-payment, and all provisions discriminatory to the mentally ill, as well as the establishment of congruent ages for Medicare and Social Security benefit eligibility. Both the immediate expansion of the current program and a future national health plan should provide for a public-private partnership in the delivery of services and for Federal financing and quality controls in order to assure uniform benefits and uniform application of the standards of quality. Centralized responsibility for standards and controls over health facilities and services must be combined with protection, for the patient and provider, from arbitrary capricious, and varied application and interpretation of existing as well as new standards.

A. Administrative Response

1. "This Administration concurs with the recommendations of Conference delegates that the time has come for a national health insurance program. This Administration vigorously supports a fiscally responsible and administratively workable national health insurance plan."
2. "The Administration will propose a National Health Plan to the 93rd Congress. In connection with the development of the National Health Insurance Plan, consideration will be given to coverage issues which are directly applicable to the concern expressed by the Delegates, relative to the areas not now covered by Medicare."
3. "The President signed into law P.L. 92-603 which limits future increases in the premium for supplementary medical insurance under the Medicare program."
4. "The Administration has urged Congress to approve a program to aid in the demonstration of Health Maintenance Organizations that would provide comprehensive health care services.

The Social Security Amendments of 1972, P.L. 92-603, provide that Medicare beneficiaries may choose to have their covered health care provided through a Health Maintenance Organization (a pre-paid group health or other capitation plan that meets prescribed standards). Under this option the choices available to Medicare beneficiaries for securing health care services will be increased and, hopefully, by stimulating competition among various sources of health care, contribute to more efficient and economical delivery of services generally for all patients."

5. "The President signed into law P.L. 92-603 which included provisions to extend and liberalize the Medicare program."
6. "The Administration has proposed reform of cost sharing provisions in the Medicare program that will result in significant cost reductions for those with longer term illness and provide better designed incentives for appropriate utilization of medical services."
7. "This Administration is seeking ways to curb inflationary forces that have forced health costs to increase -- thus affecting the income position of many older Americans."

8. "The President has launched and followed-up on a vigorous program to assure that nursing home patients get the kind and quality of care they need and deserve.

On July 19, 1972, the President and his Special Consultant on Aging met with officials of the Department of Health, Education and Welfare to receive a report on progress made in implementing this eight-point program [which includes:]

- Cut-off of Federal funds to substandard nursing homes.
- Coordination of Federal enforcement activities.
- Training of state nursing home inspectors.
- Federal assumption of state Medicaid nursing home inspections costs.
- Expanded resources for Federal nursing home standards enforcement.
- Training of medical and allied health professionals working in nursing homes.
- Assisting states to establish nursing home patient ombudsman units.
- Review and development of new Federal policy and program proposals."

9. "An additional aspect of the Administration's efforts regarding nursing homes has been a "study of alternatives to institutional care which will focus upon the appropriate placement of patients, with attention to the delineation and scope of supportive services needed, financing mechanisms, cost of care, and health status."

B. Response of Study Panel

Provisions in P.L. 92-603 have contributed to the realization of some goals in Recommendation III. However, regressive measures which move us away from the goals charted in this Recommendation include:

- a) cost sharing provisions under Medicaid, through which States would impose monthly premium charges on the medically indigent and through which States could impose nominal deductives and co-payment amounts;
- b) limits on payments to skilled nursing facilities and intermediate care facilities under Medicaid;
- c) elimination of the requirement that States move toward a comprehensive Medicaid program;
- d) elimination of Medicaid maintenance of effort requirement;
- e) the authorization granted the Secretary of Health, Education, and Welfare to compute a reasonable differential between the costs of skilled nursing facility services and intermediate care facility services provided in a State to Medicaid patients;
- f) the delay until July 1, 1976, of the requirement that States reimburse skilled nursing and intermediate care facilities on a reasonable cost-related basis.

Fundamental issues contained in the original Recommendation have not been addressed. Issues concerning the breadth of benefits under Medicare, the infusion of general tax revenue to Medicare, and the overall federalization of the Medicaid program remain.

While the HMO concept is no panacea for the health problems of the elderly, it deserves the opportunity to prove itself. The Administration proposal is lacking the provisions and resources to offer a complete demonstration that the HMO concept is a valid way to assure comprehensive, coordinated quality health services to the elderly.

The National Health Insurance debate must come to grips with the issue of how much of health care is insurable, how many benefits should be considered essential, how much of the uninsurable risk should be borne by the individual, and how much should be underwritten from general tax revenues.

The Administration proposal for national health insurance leaves the elderly in their current status and does not respond to the fundamental policy suggestion made in Recommendation III: that elderly, solely by reason of age, become entitled to comprehensive health benefits.

Administration proposals to increase cost sharing under Medicare are in direct conflict with the recommendation.

RECOMMENDATION IV

A continuing national program for education of all persons should be provided about the specific physical, mental, and social aspects of aging. Educational programs should be addressed to all ages and should include all stages of development so that the different age groups will better understand each other. Information on all aspects of aging should be included in educational courses at all levels. The aged themselves should be among those recruited, trained, and utilized in carrying out these programs.

A. Administration Response

1. "Consistent with the resources that may be available at any given period of time, the Administration will work with State and local governments and the private sector in order to facilitate progress in the following areas of activity-- areas which can contribute to the change in attitude called for by the President in his address to the delegates of the White House Conference on Aging.
 - o Focusing attention on the needs of older persons.
 - o Developing a better understanding of aging and the aged by preparing materials for the media and including appropriate materials in the curriculum at all levels of education.
 - o Providing opportunities for interaction between the young and older adults."
2. "The Administration is seeking to remove obstacles to jobs for older workers and to provide employment and volunteer opportunities."

B. Response of Study Panel

The Panel notes that while the Administration's response to Recommendation IV has been somewhat sparse, the legislative response has been more affirmative.

Specifically, the proposed Research on Aging Act of 1972, if enacted into law, would have established a National Institute on Aging, among the functions of which would have been the dissemination of findings of Institute-sponsored research and other relevant information about aging, through public information and education programs.

The proposed Older Americans Comprehensive Service Amendments of 1972 would have established a National Information and Resource Clearinghouse for the Aging, which would have held responsibility for disseminating information relating to the aged.

Among other provisions, the Amendments would have also broadened existing and fostered the development of new programs designed to employ older persons in educational and community service programs.

The veto of these pieces of legislation has emasculated the steps taken to implement Recommendation IV. The panel calls for the enactment of the Older Americans Act and reconsideration of Research on Aging Act.

RECOMMENDATION V

Emphasis should be placed on including curricula or course contents on physical, mental and social aspects of aging in secondary schools, undergraduate professional education, and in in-service training and continuing education of health personnel. The development of specialists in the care of the elderly should also receive emphasis, especially with the view of developing professional, allied health professional, and other health personnel selected and trained to give compassionate and expert care to the aged. Funds must be provided to ensure the development of such programs as well as increase the supply of health manpower of all kinds.

A. Administration Response

1. "Developing a better understanding of aging and the aged by preparing materials for the media and including appropriate materials in the curriculum at all levels of education."
2. "Administration policies in the following areas will help institutions of higher learning to initiate, strengthen and expand programs designed to attract persons to and prepare them for careers in the field of aging:
 - a. Providing financial assistance for students in higher education with the understanding that they will then be free to use this assistance in order to pursue any specialized program they desire to pursue.
 - b. Providing central coordination for the Federal government's programs of research in aging so that the large investment of resources in this area will be related to agreed-upon objectives.
 - c. Using Federal dollars to encourage the development of comprehensive and coordinated service programs for older persons at the community level."
3. "Colleges and universities will from time to time have the opportunity to participate in training programs designed to meet the specific needs of Federal departments and agencies for trained personnel in aging."

4. "The Administration will provide a focal point within the governmental structure for those colleges and universities that have made or will make a commitment to the field of aging in order to assist them in working with the Federal departments and agencies."
5. "Training of medical and allied health professionals working in nursing homes. Federally-sponsored programs operated in conjunction with national professional associations and nursing home groups are programmed to reach 20,000 of the Nation's 500,000 long-term care personnel this year, with an additional 20,000 next year. Primary focus is on physicians, nurses, nursing home administrators and patient activity directors."
6. "In order to increase the effectiveness of the NIH activities in this area, the decision has been made to create a Center for Aging Research within the National Institute for Child and Health and Human Development. This center will coordinate the activities of the Gerontology Research Center, a research facility for Government scientists conducting aging research, and the Adult Development and Aging Branch through which funds pass to support non-Governmental scientists working on aging. The combined total of their expenditures is over \$12 million per year."
7. "The National Institute of Mental Health. The Institute conducts a wide range of research projects on psychological, social and emotional aspects of aging."

B. Response of Study Panel

The Panel notes some of the steps taken by the Administration to implement the intent of Recommendation V. Specifically, the Panel notes: 1) the increased focus upon the provision of training to those employed in nursing homes and related care facilities; 2) the promotion of curriculum development in aging at colleges and universities.

However, the Panel views with alarm the vetoes of the Research on Aging Act of 1972 and the Older Americans Comprehensive Services Amendments of 1972, which would have provided visible evidence of support for curriculum development and training, both career development and in-service, for health personnel and others serving the aged.

The Panel recommends reintroduction of these bills in Congress, appropriate action, and approval by the Chief Executive.

Administration initiatives in the manpower field are of such a technical nature that the panel felt unable to measure them against the recommendation. In as much as the panel on Research and Training has studied these measures extensively it is requested that their appraisal be considered as a response to this recommendation.

RECOMMENDATION VI

The aging will best be served if available funds are divided among service, research, and education. Emphasis should be placed on funding of direct services but not to the exclusion of research and education which should receive a reasonable proportion of total resources available. Research findings now available should be assembled, coordinated, and incorporated into service programs.

Specific attention should be given to increasing the funds available for basic research and for operational research with a strong suggestion that a gerontological institute be established within the National Institutes of Health to provide the essential coordination of training and research activities.

A. Administration Response

1. See #1 under Recommendation I.
2. "The Administration is prepared to work with States, local communities and the private sector in a new effort to bring into existence comprehensive coordinated service programs for older persons at the community level. These programs should be designed to enable older persons to maintain their independence by remaining in their own homes or other places of residence."
3. "The Administration will take steps to insure that the Federal departments and agencies that have resources available for research in aging work as a team in order to achieve the comprehensive, coordinated program referred to by the President in his message. The specific steps that will be taken to achieve this objective will be announced shortly."
4. "More than \$1 billion is spent annually by NIH on research involving many diseases which affect older persons."
5. "Seven million dollars is slated to be spent [by AOA] in Fiscal Year 1974 on a wide range of high-impact projects which promise short-term results."
6. "...the decision has been made to create a Center for Aging Research within the National Institute for Child Health and Human Development."
7. See also #1, 2, 3, 4, and 5 under Recommendation V.

8. "The Secretary of HEW has appointed a new Technical Advisory Committee for Aging Research to devise a plan to bring together the total aging research resources available into comprehensive research strategy."
9. "The Administration is requesting both the strengthened and expanded Advisory Committee on Older Americans and the new Technical Advisory Committee for Aging Research to give a high priority to the field of mental health with the end in view of recommending strategies to both the private and public sectors designed to bring about a significant improvement in the mental health care of older persons."
10. "The hospitals and clinics of the Veterans Administration are conducting hundreds of research projects. Of special concern to older persons are the agency's investigations in diabetes and diabetic retinopathy, endocrinology of the aging and aging bone metabolism. During 1972, the Veterans Administration obligated over \$4.6 million for research projects in aging."
11. "Current research by the Atomic Energy Commission is directed toward the goal of obtaining a better understanding of effects of radiation on the body over time, including the relationship to the degenerative processes responsible for senescence. Information of this sort is essential to the formulation of radiation protection guides and the estimation of biological costs of nuclear energy activities. The projected level of funding in Fiscal Year 1973 for the support of research on aging at AEC owned (on-site) laboratories and off-site contractor facilities is \$4.5 million."
12. "The National Science Foundation is supporting research on the societal impact of a changing age structure in the United States population and on assessing programs and institutions necessary to meet the changing needs of the aged."
13. "The Office of Nursing Home Affairs has initiated studies of long-term care in three essential areas: the quality of institutional care, the alternatives to institutional care, and ongoing data collection and analysis."
14. "[NASA] is seeking to determine ways in which the benefits of its general research can be made applicable to older Americans."
15. "The National Institute of Mental Health has underway an evaluation of its research projects for older persons to determine better ways to deliver mental health services to older persons."

B. Response of Study Panel

Attention to several of the components of Recommendation VI is acknowledged to have been paid prior to the White House Conference on Aging. Recognition of training, research, and service needs in aging has continued, with some increases in funding to the National Institute of Child Health and Human Development and significant increases in funding to the Administration on Aging.

However, the last portion of Recommendation VI calls for the establishment of a Gerontological Institute within the National Institutes of Health. Such an Institute was provided for in the Research on Aging Act of 1972. The Act failed to become law. It is felt that this is a serious blow to hopes for increased research and training of scientists. Such research and training is essential for the improvement of the health and welfare of our older people.

The Panel hopes that creation of this Institute on Aging will be approved next year after further consideration.

The Panel once again expresses its hope that the amended Older Americans Act be enacted into law.

It further requests that references be made to the response of the Panel on Research and Training.

RECOMMENDATION VII

A center for aging should be established in the National Institute of Mental Health to meet the responsibilities for more research and training in the field of mental health of the elderly.

A. Administration Response

1. See #8 under Recommendation VI.
2. "The National Institute of Mental Health has underway an evaluation study of its research training and service projects for older persons, with special emphasis on community health center programs."

B. Response of Study Panel

The Panel is encouraged by the studies underway by both the Technical Advisory Committee and NIMH. These efforts should help to underline the need for a comprehensive strategy to meet the Research and Training requirements of providing adequate mental health care to older persons.

The Panel reiterates the Conferees call for the establishment of a Center for Aging within the National Institute of Mental Health and a level of funding commensurate with its importance and National mission.

RECOMMENDATION VIII

The President and Congress should authorize the appointment of a commission on aging, including a committee on mental health of the elderly, comprised of representatives from concerned Federal agencies, national organizations, Congress, and the Judiciary, and private citizens, to study, evaluate, and recommend a comprehensive set of policies for the Federal Government, the several States, and local communities to pursue in this vital area.

A. Administration Response

1. See #8 and 9 under Recommendation VI.

B. Response of Study Panel

The Panel does not recognize a response on the part of the Administration to the recommendation calling for the establishment of a commission on aging charged with recommending a comprehensive set of National policies in aging.

A Council on Aging, appointed by the President, with the advice and consent of the Senate, can have been realized through the proposed Older Americans Comprehensive Service Amendments of 1972. The Council provided for in those amendments would have held responsibility for reviewing and evaluating on a continuing basis Federal policies, programs, and other activities affecting the aged. It would also have been charged with advising and assisting the President on matters related to the special needs of the aged.

The Panel urges that the establishment of such a Council be again given consideration.

Meanwhile, the Panel encourages provocative action on the part of the strengthened Advisory Committee on Older Americans and the new Technical Advisory Committee on Aging Research. The Panel is particularly hopeful that each will fulfill the Presidential directive to give a high priority to examining and proposing improvements in our system of mental health care. The Panel encourages the Administration to appropriately attend to the recommendations emanating from these committees.

RECOMMENDATION IX

Congress should appoint a nationwide interdisciplinary committee to determine the scope and type of intervention procedures and protective services that would clearly protect the rights of the individual with health, mental health, and emotional problems requiring care. The rights of his immediate family and other close associates should be considered. This committee should include representatives of the religious, civil rights, civil liberties, legal, health, and social services communities. Congress should appropriate sufficient funds to assure an indepth study of all aspects of the individual's rights in relation to his needs for health services and the administration of his affairs until he can resume responsibility. Intervention procedures and protective services also should assure for elderly individuals their rights of self-determination in their use of health facilities and services.

In order to promote and encourage the establishment of ombudsman services, the nationwide interdisciplinary committee, or other suitable means, should be used to study and define the functions and roles of ombudsmen as separate and distinct, conceptually and in practice, from other protective services and from consumer participation in health and other matters affecting the elderly. Subsequent promotion of ombudsman services should include financial support for their activities as well as programs to assure that their functions and findings are given full visibility at local, State, and national levels, and in both the public and private sectors.

A. Administration Response

1. "The Administration agreed with the delegates to the White House Conference on Aging that the provision of legal services, law enforcement and the protection of the civil rights of the elderly are essential to assuring the independence and dignity of older persons."
2. "The Administration believes that legal services should be included as part of a comprehensive and coordinated service program for older persons as they are developed at the community level."
3. "The President has launched and followed-up on a vigorous program to assure that nursing home patients get the kind and quality of care they need and deserve... (by) assisting States to establish nursing home patients ombudsman units."

B. Response of Study Panel

Protective services demonstrations have been supported and funded by the Administration on Aging on a limited basis beginning before the White House Conference on Aging (WHCoA). No additional commitment has been displayed since the WHCoA. The need for protective services is mandated by the direction given from the White House Conference for finding alternatives to institutionalization.

The model ombudsman units which have been established for nursing home patients, indicate movement toward an operational definition of the ombudsman concept. The success of the units should be evaluated, and, based on such evaluation, steps should be taken to formally implement and support, with continuity, the ombudsman function.

EXPLANATORY NOTE

The following recommendations which were proposed by the Delegates in the Special Concerns Sessions on "Mental Health Care" and "Long Term Care for Older People" do not fall within the scope of any of the recommendations of the Physical and Mental Health Sections. For this reason the Study Panel considered them separately. They are presented herewith as Recommendations X-XVII.

RECOMMENDATION X

Mental Health Care Strategies

It is recommended that all funds allocated by the Congress for research, training and services for the elderly should be released and distributed promptly both now and in the future, with speedy cooperation of the Executive Branch of the government where required.

A. Administration Response

1. No response

B. Response of Study Panel

The Study Panel recognizes that there has been no response to this Recommendation which calls for the prompt release and distribution of Congressionally-appropriated funds for aging programs. The principle contained within it is reaffirmed. Steps must be taken to release and distribute funds appropriated for research, training, and service for the elderly. The intent of the Congress, now and in the future, should receive appropriate attention.

RECOMMENDATION A.1

Long Term Care for Older People

It is recommended that a national policy on long-term care needs must have mechanisms for being implemented and financed; that supplementary resources are needed to be allocated to means of financing alternate care; that this is a reason for low standards of care in many long-term care institutions; that we need a change in national priorities to human needs; and that we call upon the government to change our national priorities, shifting some of our resources from defense, foreign assistance, and space priorities to the needs of our elderly citizens to implement a national policy on long-term care.

A. Administration Response

1. "The President has launched and followed-up on a vigorous program to assure that nursing home patients get the kind and quality of care they need and deserve."
2. "Review and development of new Federal policy and program proposals. The Office of Nursing Home Affairs has initiated studies of long-term care in three essential areas: the quality of institutional care, the alternatives to institutional care, and ongoing data collection and analysis. The quality study will focus upon the development, testing, and evaluation of measures of the performance of institutions, and the assessment of the outcome to patients of care within institutions.

The study of alternatives to institutional care will focus upon the appropriate placement of patients, with attention to the delineation and scope of supportive services needed, financing mechanisms, cost of care, and health status. The data collection and analysis study will develop a systematic data/report plan to produce uniform data on nursing homes and intermediate care facilities. The data system will provide comprehensive data on a local, state, regional, and Federal basis."

3. "The Veterans Administration is carrying out a program to improve the quality of nursing home care in the institutions under its control."
4. "Additional efforts are underway to increase the number of nursing home units available to elderly persons. The Federal emphasis must, however, continue to be one of assisting in financing of services provided in nursing homes through Medicare and National Health Insurance."

5. increased the authorized number of nursing home care beds available under the Veterans Administration.
 6. in the comprehensive study underway in the Office of Nursing Home Affairs, addressed itself to the issues of funding and financing nursing home facilities and payments."
- "The Administration is prepared to work with States, local communities, and the private sector to develop comprehensive, coordinated service programs which will enable older persons to maintain their independence. To this end:
7. "The President, in order to make available the services of Health Maintenance Organizations to a large number of older persons; recommended to the Congress that Medicare recipients be enabled to join such programs."
 8. "The Administration is prepared to work with States, local communities and the private sector in a new effort to bring into existence comprehensive coordinated service programs for older persons at the community level. These programs should be designed to enable older persons to maintain their independence by remaining in their own homes or other places of residence."
 9. "The Administration supports the objective of enabling older persons to remain in their own homes or other places of residence rather than being placed unnecessarily in mental and other types of institutions."
 10. "More than 400 community mental health centers, with Federal assistance, are offering a variety of out-patient services to citizens of all ages."
 11. "NIMH has under way an evaluation of its research, training, and service projects for older people, with special emphasis on community health center programs. "
 12. "The Office of Nursing Home Affairs has initiated studies of long-term care in three essential areas: the quality of institutional care, the alternatives to institutional care, and ongoing data collection and analysis. The quality study will focus upon the development, testing, and evaluation of measures of the performance of institutions, and the assessment of the outcome to patients of care within institutions."

13. The National Center for Health Services Research and Development has initiated research projects directed at evaluating models for alternatives to institutional care, and developing instruments to measure the quality of care in long-term care facilities.
-

14. "The Veterans Administration continues to develop new techniques to help older persons remain independent in their own homes or other places of residence."

B. Response of Study Panel

The Panel notes with interest and approval the recent appointment of an advisory panel to the Office of Nursing Home Affairs to develop a National policy on long-term care. This action is responsive to the recommendation of the White House Conference, and it is hoped that the advisory panel will address itself not only to institutional long-term care and to those services which can reasonably be defined as health or medical services, but also to the whole spectrum of social and environmental supporting services which make independent survival of older people a reality.

The Panel applauds the recent vigorous efforts of the Department of Health, Education, and Welfare toward the improvement of the quality of long-term institutional care and hopes that adequate financial support will be provided for the permanent pursual of these efforts as evidence of a national commitment to improving the quality of life for older people. This long-term commitment is necessary since in spite of our best efforts, institutional care will always be necessary for some segments of our older population.

RECOMMENDATION XII

Long Term Care for Older People

It is recommended that more registered nurses be placed in leadership positions in all programs involving health care of the elderly at all government levels.

A. Administration Response

1. No response.

B. Response of Study Panel

The Panel acknowledges no response to this recommendation. The Panel reaffirms the recommendation that nurses appropriately trained and oriented toward the needs of the elderly, should be placed in positions commensurate with their knowledge and skill.

RECOMMENDATION XIII

Long Term Care for Older People

It is recommended that, to encourage the physician to accept responsibility for the medical care of patients in long-term care facilities, the coverage limitation of one physician visit per patient per month in nursing homes be eliminated and that physicians be allowed to see patients as often as deemed necessary by the professional staff as the patient's condition warrants.

It is further recommended that the physician be reimbursed at his reasonable established fee level without reduction for seeing several patients during one visit in extended care, skilled nursing, and nursing facilities.

A. Administration Response

1. "Through both the Medicare and the Medicaid programs, steps have been taken to assure adequate medical participation in the care of older persons in nursing homes.

The Conference's concern about physicians' visits to nursing homes must be discussed in terms of differences between Medicare and Medicaid programs. There is no Medicare limitation on the number of medically necessary physician visits the program can pay for in skilled nursing facilities or in nursing homes. These visits may be made as frequently as needed by individual patients. If a Medicare patient is receiving institutional care in a facility below the extended care level and receives more than one visit a month, then the claim must be adequately documented to reflect the medical necessity of the additional visits. Where more visits are needed, reimbursements will be made.

Under the Medicaid program, the State determines the policy concerning physician reimbursement for nursing home visits not to exceed 75% of customary and prevailing charges."

B. Response of Study Panel

The sole objective of Recommendation XIII is to provide appropriate levels of physician care in the nursing home. Generally, the problem is one of inadequate intensity of care rather than excessive or unnecessary visits; although it is recognized that certain excesses have occurred and should be prevented.

Efforts at placement of patients in programs providing appropriate levels of care, utilization review, and mechanisms for peer review and Federal audit, should ensure satisfactory performance. The role of medical director in long-term care facilities under consideration by Department of Health, Education, and Welfare regulations will be helpful. When appropriate, a system of organized medical staff structure akin to that in our hospitals is probably ultimately the vehicle of choice.

It is noted that there is no medicare limitation on the number of medically necessary physician visits the program can pay for in skilled nursing facilities or in nursing homes.

RECOMMENDATION XIV

Long Term Care for Older People

It is recommended that the Secretary of Health, Education, and Welfare study the feasibility of health facilities (i.e., hospitals, nursing homes, extended care facilities, etc.), including long-term care facilities, becoming public utilities and that his report be submitted as part of the post-White House Conference on Aging report by December 31, 1972.

A. Administration Response

1. "The Office of Nursing Home Affairs has initiated studies of long-term care in three essential areas: the quality of institutional care, the alternatives to institutional care, and ongoing data collection and analysis."

B. Response of Study Panel

The study being undertaken by the Office of Nursing Home Affairs and directed toward developing a comprehensive Federal plan for long-term care, both within and outside of institutions, is cited as giving attention to the feasibility of making health facilities into public utilities. The Study Panel deems this an adequate Administration response.

RECOMMENDATION XV

Long Term Care for Older People

It is recommended that there should be Federal financing available for the construction of nursing homes and health facilities. It is further suggested that this financing take the form of a 40- to 50-year loan with a three to five percent interest rate or a guaranteed loan system.

A. Administration Response

1. "The President has announced that "a major housing study is now underway within the government, under the direction of my Counsellor for Community Development. Within the next six months, I intend to submit to the Congress my policy recommendations in this field, based upon the results of that study."

"The special problems and needs of elderly persons will, in the course of this study, be given close consideration."

"In connection with the basic review of housing policy, the Federal subsidized housing programs were suspended effective January 5, 1973. During the review, however, the Federal government will continue to honor commitments already made and the level of subsidized housing starts during calendar year 1973 is expected to exceed the previous year's level."

B. Response of Study Panel

The Panel urges HUD and HEW to carefully consider the recommendation during the period of the "moratorium". It should be noted that many facilities now providing intermediate care are below standard in regard to their physical plan. Undoubtedly there will be a need for considerable capital in this particular field.

RECOMMENDATION XVI

Long Term Care for Older People

It is recommended that appropriate Federal and State regulatory bodies and consumer protection agencies be urged to take appropriate action to protect the public by curbing the misleading and exaggerated mass media solicitation and advertisement of voluntary health insurance programs to the elderly and the general public.

A. Administration Response

1. "Although not specifically directed to this issue:

- a. The Administration has proposed the Medical Device Safety Act which will establish mandatory safety standards for potentially hazardous devices, especially governing their efficacy prior to being marketed.
- b. The President signed legislation creating the Consumer Product Safety Commission.
- c. FDA publishes Consumer Guide for Senior Citizens which warns against specific types of deceptive practices in the market place."

B. Response of Study Panel

Specifically addressed in this recommendation is action directed at regulating the insurance industry, action which is recognized by the Study Panel to lie presently within the purview of the States and their regulatory bodies. State insurance regulatory agencies have the responsibility to analyze what is offered through various insurance plans and to make known what is available. The Panel, therefore, recommends that the Federal Government provide incentives to States to use their controls over the insurance industry to protect the elderly from unscrupulous and misleading advertisements of voluntary health insurance programs.

RECOMMENDATION XVII

Long Term Care for Older People

It was recommended that the Department of Health, Education, and Welfare consider the feasibility of national certification for consultant pharmacist to separate the "paper" consultant from the bonafide consultant pharmacist and that the Department also explore the possibilities for reasonable reimbursement of consultant pharmacists for consulting services.

A. Administration Response

No response

B. Response of Study Panel

Directed at ensuring that appropriate supervision is provided in the dispensing of drugs within nursing homes and other care facilities, this Recommendation is acknowledged to have been given no response. The Panel suggests that the appropriate unit of the Department of Health, Education, and Welfare examine the points raised within the Recommendation.

PLANNING AND GOVERNMENT, NON-GOVERNMENT
ORGANIZATIONS

PLANNING AND ORGANIZATION

PREAMBLE

Although the Panel was aware of the uncertainties that exist about the specific future of programs and policies for the Aging, it was able to find many encouraging developments in this post Conference year.

We had to withhold judgement on a number of the specific recommendations made at the White House Conference. In some cases, as for example those dealing with Federal legislation, there was no certainty as to the exact nature of what will finally be enacted.

In others, such as State legislation, we could only note trends. Many of the arrangements that are being made will be modified in response to the enactment of H.R. 1 which federalizes programs for the disabled, the blind, and the aging. And we did not have knowledge about many of the local facilities and programs that have been altered as a result of the Conference, particularly in response to the emphasis it placed on governmental cooperation with the private and voluntary segments of our society.

Those of us who are actively participating in planning, such as that which has gone on in preparation for the national nutrition program, have become aware both of the difficulties involved and the potential gains this activity promises. We are wholeheartedly agreed that a major program of on-site research will be needed before any conclusion about the degree and kind of success these plans have met, can be made. We hope that, in some form, a post-Conference agency which can regularly review the material coming out of that research will be provided with adequate staff. The paucity of knowledge about what is currently going at the State, and particularly the local level, makes it impossible to review a particular proposal in the light of what has happened to similar ones elsewhere.

Nevertheless, there is today much greater communication than there was before the Conference. This has been greatly enhanced by Mr. Flemming's appearances all over the country. He has learned from those with whom he has talked, and has been able to tell them in return what others are doing and what appears to be most successful. The Study Panel benefited from the briefing he was able to give us.

In spite of the uncertainties the Study Panel faced, there was a feeling that the White House Conference has resulted in a surging wave that will have great and long lasting results.

1. PLANNING

RECOMMENDATION I

To be responsive, planning must involve inputs from many segments and sectors of our society. To be effective, this planning must be comprehensive and coordinated. The planning efforts of government should continue to constitute the basic means through which the Nation plans in aging. We recommend that government at all levels be required to provide opportunity for significant involvement of the non-governmental sector and consumers in the decision-making process.

A. Administration Response

1. "The Administration has proposed amendments to the Older Americans Act which would actively involve voluntary agencies in the establishment of comprehensive and coordinated systems for the delivery of social and nutritional services."
2. "The Secretary of Health, Education and Welfare has issued regulations under the new Nutrition Program for the Elderly which are designed to assure, in accordance with the law, that nutrition projects are established and administered with the advice of persons competent in the field of nutrition, of older persons who themselves will participate in the program, and of persons who are knowledgeable with regard to the needs of older persons."
3. "Both prior to and since the White House Conference on Aging, the Chairman of the Conference has consulted with the Washington representatives of the national organizations of older persons."
4. "The Secretary of Health, Education and Welfare has provided for the expansion and strengthening of the Advisory Committee on Older Americans -- a committee which, with the exception of the Chairman and Vice Chairman -- is made up of persons from outside government."

"In addition, the Secretary has also appointed a new Technical Advisory Committee for Aging Research. The members of this committee are from the private sector. In order to contribute to both their effectiveness and their independence, the Secretary has provided both of these committees with their own staffs."

5. "The Administration, through the Administration on Aging, has enlisted the cooperation of the National Center for Voluntary Action to provide staff assistance for the Steering Committee of National Volunteer Organizations."
6. "The initiation of Project FIND in the summer of 1972 exemplifies the commitment of the Administration to facilitate the involvement of the non-government sector in programs for older persons."

B. Response of Study Panel

In the year which has followed the White House Conference on Aging, the Study Panel recognizes a growing Federal sensitivity to the problems of the elderly and an increase in Federal planning activities designed to offer solutions to such problems. To be effective, such activity must continue into the future.

Concomitant with the increased attention has been increased representation of the older consumer and the private sector in planning and decision making bodies. The aged and their representatives are being granted the opportunity for significant involvement.

However, to ensure that consumer participation in the planning process reaps maximal benefits, the Study Panel recommends that increased resources be made available to provide training and technical assistance. In recognition of the fact that good planning has its base in information, training and technical assistance would serve to broaden the base of planners knowledge, sharpen the planning skill, and increase the level of responsiveness of the planning mechanism.

RECOMMENDATION II

A separate entity should be created within the Executive Office of the President through legislation and charged with the responsibility for comprehensive planning and advocacy in aging.

This entity should have resources (e.g. authority, funds, staff) adequate to meet this responsibility. This Administration on Aging should be retained within the Department of Health, Education, and Welfare, but it should be raised to the status of an independent agency within the Department, reporting directly to the Secretary.

There should be an interdepartmental committee with representation at the Secretarial level to be chaired by the senior Federal official on aging.

A. Administration Response

1. "The President created the Domestic Council Cabinet-level Committee on Aging to respond to the needs of the elderly at the very highest level of government."
2. "Upon taking office, the President appointed the Commissioner of Aging to serve as his Special Assistant on Aging."
3. "The Administration proposed amendments to Title III of the Older Americans Act which provide additional stimulus to planning and coordination."

Under the proposed amendments, the Administration on Aging would establish general priorities which would serve as guides to activities at the State and local levels."

4. The Administration on Aging has been moved to the Office of the Secretary of Health, Education, and Welfare within the Office of the Assistant Secretary for Human Development.

B. Response of Study Panel

The underlying purposes of Recommendation II are, first, to establish a locus within the Federal Government where responsibility for comprehensive planning and advocacy can be fixed; and second, to assure through organizational arrangements that there will be sufficient power to assure effective comprehensive planning and advocacy at a national level.

The Study Panel recognizes that, in response to the Recommendation:

1. A separate entity with responsibility for comprehensive planning and advocacy in aging has not been created within the Executive Office of the President.
2. The Congress, in passing the Older Americans Comprehensive Services Amendments of 1972 chose not to include with the legislation the creation of a separate entity within the Executive Office of the President.
3. Responsibility for comprehensive planning and advocacy in aging was fixed in the Older Americans Act and substantially extended under the Older Americans Comprehensive Services Amendments of 1973.
4. "The Administration on Aging, within the Department of Health, Education, and Welfare, has been moved to the Office of the Secretary within the Office of the Assistant Secretary for Human Development. While this is a raise in stature, the Administration on Aging is not yet an independent agency and does not report directly to the Secretary"
5. The Domestic Council Committee on Aging, created by the President, does meet the recommendation concerning an interdepartmental committee with representation at the Secretarial level.
6. The establishment of positions of Special Assistant to the President on Aging (Commissioner of Aging) and the Special Consultant to the President on Aging, provides for client advocacy opportunities within the White House establishment.

Certain steps taken have moved the Federal establishment closer to achieving the first of the two underlying purposes of the recommendation than at any time in the past. However, responsibility and authority for planning and advocating programs for the elderly continue to be diffuse. In a sense, no one can be held accountable for comprehensive planning for the elderly. Housing, income, health, transportation, and social services planning is spread across all of the Federal bureaucracy. There is no institutionalized planning mechanism for aging as such. One must acknowledge, however, that this is also true for many other client groups. Indeed, comprehensive planning in domestic affairs, outside the area of national fiscal policy and the Office of Management and Budget, probably does not exist.

The Study Panel recognizes the essential validity of the purpose of fixing a locus for responsibility and advocacy, and the desirability of institutionalizing, to the extent possible, the progress made up to now and advances yet to come. If administrative measures can be taken to advance the basic purpose, they should be taken by executive action now. The legislature, however, should take appropriate steps to advance the basic purposes of this recommendation and affirm the need for and importance of having an identifiable unit with power and access to the Chief Executive.

In the final analysis, the Study Panel recognizes that underlying effective advocacy and comprehensive planning, there must be effective Executive Branch policy that transcends any organizational arrangements.

RECOMMENDATION III

There was recognition of the urgent need for a commitment within each State Government to provide comprehensive planning in aging.

It is recommended that this could best be realized by the establishment of a separate entity dedicated to comprehensive planning in aging within each State Government.

The leadership planning mechanism at State and local levels should, to the extent possible, parallel the mechanism at the Federal level. Where appropriate, such planning at the local level should be undertaken on a regional, e.g. multi-county basis.

Comprehensive planning at the local level should be encouraged but the mechanism left to local option. This effort should embrace a partnership between the governmental and voluntary sectors of our society.

and

RECOMMENDATION V

Planning activities in aging of the three levels of government should be related to each other, and planning at State and local levels should receive financial support from the Federal Government.

In order to insure that coordinated comprehensive planning functions at State and national levels are meaningful and effective, priorities and service needs should be identified at the local level. Federal funds

should be provided for local planning in aging and be channeled through State units on aging which, in turn, will allocate funds to regional and local planning bodies for this purpose.

Federal agencies should be directed to assure that any Federal planning grants which have implications for human services, whether made to States or localities, shall require specific planning for the special needs of the aging. During all planning stages, the development of the plan shall be coordinated with the State agency on aging.

There should be basic mechanisms established to provide coordination of planning activities in aging at all three levels of government and across department lines. These should include regional forums organized by the Federal Regional Councils, and systematic Federal and State evaluation of planning in aging.

In order to allow maximum flexibility at the State and local levels for innovation, Federal funds in the form of bloc grants without restriction should be set aside for long term planning in aging.

A. Administration Response

1. "This Administration is committed to bringing about more effective planning and coordination of Federal programs in the field of aging and to encouraging the coordination of Federal resources with those made available by state and local governments and by private agencies."
2. See #1, #2, #3 under Recommendation II.
3. "The President directed those agencies whose programs have a major impact on the lives of older persons to provide the Domestic Council Committee on Aging with the amounts they expect to spend during the current fiscal year in their respective programs."
4. "The Administration will take steps to improve coordination in the expenditure of funds from these sources."

"The President has made clear his intention of utilizing the powers of the Presidency in order to bring about more effective Federal coordination in both the planning and implementation of programs for older Americans."

"In furtherance of the coordination process, the Administration on Aging will provide information concerning Federal programs to the States so that it can be utilized in State and local planning. State aging agencies will also be able to transmit their views on proposed Federal programs within their States, thereby furthering the interchange of information and strengthening over all coordination."
5. "As a result of action suggested by the Domestic Council Committee on Aging, the President will send a memorandum to each Department or Agency with responsibility for programs in the field of aging calling for the designation of a person to coordinate programs for older persons across departmental lines. This individual will report directly to the Secretary or agency head on these matters."
6. "The Undersecretaries' Group, acting on a recommendation of the Cabinet-level Committee on Aging, has specified that each Federal Regional Council should establish a committee on aging in order to accelerate the development of comprehensive and coordinated programs for the delivery of services to older persons at the community level."
7. "The Administration will pursue a policy of encouraging States, local school districts and institutions of higher learning, where appropriate, to utilize a larger proportion of Federal funds allocated to them, including vocational and adult education funds, to provide older persons with educational opportunities."

8. "The Urban Mass Transportation Administration within the Department of Transportation has issued new guidelines for applicants for capital grants which require that the transit plan submitted with applications include consideration of the service needs of the elderly."
10. See also #4, #5, and #6 under Recommendation I.

B. Response of Study Panel

If the Older Americans Comprehensive Service Amendments of 1972 had been signed into law, the foundation would have been laid for comprehensive planning in aging at the Federal, State, and regional levels. Accordingly, implementation of many elements contained within Recommendation III and V would have been guaranteed.

Specifically, the proposed Amendments are recognized to have provided for:

- (1) the strengthening of the Federal planning mechanism through
- a) establishing within the Office of the Secretary of Health, Education, and Welfare, the Administration on Aging, to be headed by a Commissioner directly responsible to the Secretary.
 - b) requiring Federal agencies to consult and cooperate with the Administration on Aging in the planning and conduct of programs related to the purposes of the Act.
 - c) creating a Federal Council on the Aging, whose members, appointed by the President with the advice and consent of the Senate, would advise the President and review and evaluate Federal policies and activities affecting the aging. The Federal Council would also provide public forums for discussing, gathering information on, and publicizing problems and needs of the aging.
 - d) providing for a system of advanced funding, in recognition that the long delays between the authorization and appropriation processes makes effective planning impossible.
- (2) the designation of a single State agency on aging, through which Federal funds would be channeled, to develop and administer a State plan, coordinate State activities, and review and comment upon applications for Federal assistance from agencies within the State. Such a State agency would establish objectives and a State plan consistent with purposes of Title III of the Act.

- (3) the creation of sub-State (regional, multi-county) planning and service areas, the plan for which would identify the need for social services and the effectiveness of the use of resources in meeting such need.
- (4) the requirement that the Secretary, the designated State agency, and any area agency conduct or arrange for the conduct of periodic evaluations of activities and projects under the Act.
- (5) model projects grants (what can be considered block grants) to expand or improve social services or otherwise promote the well being of older persons.
- (6) the active involvement of the private sector in the establishment of a nationwide network of comprehensive, coordinated services and opportunities for older persons.

The Study Panel, in recognition of the progress which would be made under new and similar provisions, calls for the introduction and enactment into law of new legislation to amend the Older Americans Act early in the 93rd Congress.

The Study Panel looks with favor upon the moves to increase the level of coordination among Federal departments and agencies with programs in aging. The posts of Special Consultant and Special Assistant to the President on Aging should be continued and augmented so as to ensure older persons advocacy and policy coordination at the highest levels of government. The Presidential directive that Department and Agency heads designate a person to coordinate aging programs within and across agency lines is recognized to hold potential for coordinated and comprehensive services. The Federal Regional Councils and their respective Committees on Aging appear to be another mechanism for increased coordination. The charge given the Technical Advisory Committee on Aging Research suggests development of a comprehensive plan for research in aging. It is the belief of the Panel that any such research plan must be related to operational and program goals.

The Study Panel notes, that there appears to be no adequate response to that part of Recommendation V directing that all Federal planning grants having implications for human services, be required to include specific planning for the special needs of the aging. The Study Panel again states the desirability of such a government-wide directive.

The Steering Committee of National Voluntary Organizations and Project FIND represent a partnership between the governmental and voluntary sectors in planning for services for the elderly. The Panel strongly recommends that such a partnership be perpetuated. The provisions within the Older Americans Comprehensive Service Amendments of 1972 are recognized to encourage such a partnership especially at the State and local levels.

RECOMMENDATION IV

Adequate technical assistance and consultation in planning for meeting the needs of the elderly shall be provided in territories, possessions and other non-state jurisdictions of the United States.

A. Administration Response

1. "Other recommendations made by the delegates designed to deal with special circumstances unique to a particular minority group will be the subject of special studies by the appropriate Departments or agencies."

B. Response of Study Panel

In planning for meeting the needs of the elderly, particularly through the provisions of the Older Americans Act, the Federal Government is acknowledged to have provided for the participation of U.S. territories and possessions. Included in such plans has been the extension of technical assistance and consultation, as well as fiscal allotments.

The Study Panel acknowledges that technical assistance and consultation to non-State jurisdictions, e.g., regional or multi-county units, Indian reservations, would be expanded under the planning-service area concept contained within the Older Americans Comprehensive Services Amendments of 1972. The Study Panel, consequently, calls for reconsideration of this concept in new amendments to be proposed in the next Congress.

RECOMMENDATION VI

The planning mechanisms that have been developed in communities and at the State and national levels should increase their efforts to make multigenerational programs and services more responsive to the concerns of older persons and more effective in meeting their needs. In instances in which multigenerational programs and services cannot be made responsive enough to meet the needs of older persons, new or expanded programs planned specially for the elderly should be developed.

A. Administration Response

1. See #3 under Recommendation III.
2. See #4 under Recommendation IV.
3. "The Administration is prepared to work with states, local communities and the private sector in a new effort to bring into existence comprehensive coordinated service programs for older persons at the community level."

"The Administration believes that the Federal, State or local financial resources that are available provide a significant opportunity to increase the number of communities with comprehensive and coordinated service programs for older persons. Federal financing can be made available through a combination of significant programs, namely: (1) the Older Americans Act; (2) the Adult Services provision of the Social Security Act; (3) General Revenue Sharing. In addition, Allied Services legislation is under consideration in HEW which would assist Governors in developing the capacities in State and local governments, as well as in private non-profit agencies to plan integrated service programs that are more responsive to the needs of families and individuals, including the elderly."

4. "These programs should be designed to enable older persons to maintain their independence by remaining in their own homes or other places of residence."

5. "This Administration believes that local governments should give full consideration to the use of available Federal funds, e.g., the Older Americans Act, the Adult Services titles of the Social Security Act and General Revenue Sharing to help older persons continue to be involved in society either through employment or voluntary service."
6. "The Administration believes that community level plans to develop comprehensive and coordinated services to older persons should include plans for expanding educational opportunities."
7. "The Administration believes that local governments should give full consideration to the use of available Federal funds--e.g., the Older Americans Act, the Adult Services titles of the Social Security Act, General Revenue Sharing and the proposed Better Communities Act -- to make Senior centers and the services provided through them available to a greater percentage of older Americans."
8. "The Administration believes that legal services should be included as part of a comprehensive and coordinated service program for older persons as they are developed at the community level."
9. "The Administration will encourage local communities to utilize Federal resources that are now or will be available in such a manner as to include mental health services in coordinated and comprehensive programs for older persons."
10. "The Administration will encourage local communities to include in their coordinated services systems programs: (1) to assist in the rehabilitation of the elderly handicapped; (2) to help the elderly handicapped remain in their own homes or other places of residence; and, (3) to provide the elderly handicapped with opportunities for continued involvement in life through full-time or part-time employment or through volunteer activities."

B. Response of Study Panel

The Study Panel believes that generic agencies and programs frequently fail to adequately respond to the problems of the aged.

However, in recognition of the most ideal arrangement possible, the Study Panel affirms the recommendation and steps taken to implement it. Efforts should continue to be made to make multigenerational programs more responsive. In instances where multigenerational programs fail to adequately respond to the needs of the aged, programs planned specially for the aged should be developed.

Aging demonstration programs, now underway or to be undertaken in the future, should be closely watched and evaluated. A mechanism must be found for continuing those, such as the model nursing home ombudsman units, which are judged to be successful.

RECOMMENDATION VII

Planning in aging should be based upon experience and expertise of professional and paraprofessional personnel and specialists in aging with the total involvement on an early and continuous basis of a majority representation of the elderly, including racial and ethnic minority groups. This involvement should be guaranteed in all planning for the elderly at the Federal, State and local levels. Age alone should not be the ruling factor in planning, thus, middle-aged and young persons should be included.

A. Administration Response

1. See #1, 2, 3, and 4 under Recommendation I.

B. Response of Study Panel

Planning in aging should involve professionals, paraprofessionals, specialists in aging, the aged themselves, as well as representatives of other age groups.

To ensure the fullest possible participation and contribution, task-oriented training should be provided those involved in the planning process. Especially important is the leadership training of older persons to serve as their own advocates and ombudsmen.

The Panel calls attention to its knowledge of the increased emphasis being placed upon the provision of short-term training for workers in aging, including paraprofessionals. Increased opportunities for job development, especially for subprofessionals, makes available a corps of personnel who can more effectively plan to meet the needs of the elderly.

RECOMMENDATION VIII

The Section expressed grave concern about how the elderly might fare under revenue sharing arrangements. However, if Federal revenue sharing is enacted, enabling legislation should provide for protection of the interests of the elderly.

A. Administration Response

1. "Under General Revenue Sharing, substantial sums could be used by both State and local governments to support coordinated and comprehensive service programs for older persons."

"Federal funds that are made available to the States under this Act can be used for any purposes the State designates. It is assumed that State Offices on Aging, with support of individuals and organizations who are concerned about the initiation or strengthening of these services, will present proposals to the State for the use of some of these Federal funds."

"Federal funds that pass through the States to local communities under this act can be spent for programs falling into categories identified in the law. One of these categories is social services for older persons. Here, again, this provides an opportunity to initiate or expand community programs for older persons as a result of decisions by local governments to use some of the Federal funds for this purpose."

B. Response of Study Panel

Legislation authorizing the program of general revenue sharing designates social services to the poor and aged as one of eight priority areas for local use of such funds. The Regulations issued to govern the conduct of the general revenue sharing program make only a single reference to anti-discrimination provisions, referencing Title VI of the Civil Rights Act of 1965. The Study Panel does not believe that such provisions provide adequate protection of the interests of the elderly and, particularly, the elderly within racial minorities.

While the Study Panel acknowledges that the Federal Government would violate the concept of the legislation if it were to specify how revenue sharing funds were to be used, at the same time, it recognizes that responsibility for standard setting does fall within the purview of the Federal Government. The Study Panel, therefore, recommends that standards be established which would ensure that no population group would be discriminated against in competition for general revenue sharing funds. Furthermore, such standards should ensure an equitable distribution of funds to programs and services for the elderly.

The Study Panel recommends that immediate and continual monitoring and evaluation of spending under revenue sharing be undertaken by the Federal Government. Immediate attention to and evaluation of the ways in which revenue sharing funds are being utilized will ensure that inequitable and inappropriate use of funds does not come to characterize the program from its outset.

Given the present program framework, the Study Panel strongly encourages the aged and their representatives to push for their fair share of revenue sharing funds. The pressure which can be applied at the State and local level is the most real protection of the interests of the elderly which can now be recognized.

RECOMMENDATION IX

Racial and ethnic discrimination and its attendant consequences have condemned substantial numbers of minority elderly to low levels of income and inadequate health and housing provisions. Too often, these minority groups of the elderly have not had the resources or capacity to stand up for their rights, nor have governmental agencies and citizens' organizations adequately served as advocates for them. Therefore, planning for aging must take priority cognizance of the above problems and seek to correct and eliminate them.

While we must improve the quality of life for all the aged, our top priority must go to those who suffer most. America must address itself first to the needs of the elderly poor.

and

RECOMMENDATION X

If planning is to be more than an exercise in rhetoric, it is imperative that there be appropriate authority, responsibility, and accountability; and that there be bridges linking those who administer programs, and the consumer.

To these ends we recommend that:

- *The Federal planning organization must annually review and publicly report on its proposals.*
- *The Federal planning organization shall review proposed legislation and executive activities to evaluate their possible effects upon the status of elderly persons.*

Administrative agencies annually evaluate and report on the effectiveness of their programs.

Federal agencies be empowered to take steps to insure that Federal programs administered at the State and local levels are in conformity with stated guidelines and objectives of programs.

All planning should include the use of existing private resources, both proprietary and non-profit.

A. Administration Response

1. "The Administration believes that programs in the field of aging must take into account the special circumstances that are unique to each minority group."
2. "On the recommendation of the Cabinet-level Committee on Aging, the Administration on Aging will require State planning groups on aging to include representatives of minority groups on their advisory bodies."
3. "The Cabinet-level Committee on Aging has recommended to the President that he direct the Federal agencies in the field of aging to develop provisions comparable to those contained in the Nutrition Program for the Elderly under the Older Americans Act which provide that, to the extent feasible, grants serving and operated by minority groups will be awarded in proportion to their relative numbers in the states."
4. "The Administration has taken several steps to ensure that Federal, regional and area offices are staffed with persons sensitive to the problems of minority groups."

"The General Services Administration has determined that the ethnic and racial mix of the staff members of its Federal Information Center is a prime consideration in ensuring that the elderly can feel free to express their needs. Where the need is apparent, staff members with

linguistic ability have been employed to ensure adequate communication with the public, e.g., thirteen Federal Information Centers have members of their staff who speak Spanish and seven have staff members with other language facility such as Japanese. This process has proven to be a very positive way to improve communication, particularly with the older members of ethnic and minority groups. "

"In addition, the Administration has expanded its commitment to the interests of minority groups by directing other government agencies, especially those with primary responsibility for dealing with the elderly, e.g., Social and Rehabilitation Service, Social Security Administration, U.S. Department of Agriculture and the Office of Economic Opportunity, to make certain that the regional and district offices are staffed with individuals sensitive to minority group problems, and who possess the language ability to deal effectively with the problems of the elderly from minority groups within their specific areas."

5. "Minority groups are represented on the Post-Conference Board of the White House Conference on Aging."
6. "The Cabinet-level Committee on Aging has recommended to the President that he direct all Departments and agencies to collect and evaluate data concerning the participation of minority groups in Federally funded programs for the aging."
7. See Administration Response to Recommendation IV.
8. "The Office of Management and Budget devotes considerable time and effort to making sure that Federal programs in aging are reaching all Americans -- including minorities -- in an equitable fashion."
9. See #1, 2 and 3 under Recommendation VI.
10. See #1-4 under Recommendation I.

B. Response of Study Panel

Recommendation IX is concerned with assuring that the needs and rights of minority elderly and poor elderly are adequately represented in planning for and with the elderly. Indeed, the recommendation pointedly places "our top priority" to the needs of the elderly poor. Assuring appropriate attention to those who have neither political nor economic power is at once the dilemma and the promise of a democratic society.

Our system is built on the notion of an informed and knowledgeable electorate. All planning is based upon knowledge and information. In part, the failure of our society adequately to provide for the minority elderly and the poor elderly is

rooted in ignorance--ignorance of the impact of lifetime discrimination, ignorance of the impact of inadequate pension arrangements, ignorance of the long-lasting effects of economic depressions, wars, and large and small disasters on the economic condition of the elderly.

Without knowledge, bona fide planning cannot be given effect. Accordingly, Recommendation X which calls for fixing Federal responsibility for generating information essential to planning, and for full disclosure of the condition of the elderly poor and the minority elderly should be given early effect by appropriate executive and legislative action. Accountability to the American people must include disclosure of failures to meet the needs of the scattered poor and the isolated elderly, and the impact of lifetime discrimination on minority elderly.

In planning, the cooperation of the public, private, and voluntary sectors cannot be overly stressed. Planning in aging should include consideration of each sector and the use of all existing resources. Further examination should be made of the extent and effectiveness of present voluntary programs and attention paid to the unique role which the voluntary sector can play. Annual evaluations and reports on program effectiveness should be expected of all programs, public, private, and voluntary serving the elderly.

Reports on the condition of the elderly American, however, will be only as good as they are objective and non-self-serving of the bureaucracy, public or private, Federal or non-Federal, that prepares them. One way of assuring that such reports do represent the true condition is to assure that bodies responsible for preparing such reports have review panels and staff representative of minority groups and able to speak authoritatively about the conditions the reports cover. Full opportunity must be provided for review and response by appropriate groups qualified to undertake such tasks.

Measurement of success or failure in achieving this kind of honesty and comprehensiveness in planning is difficult if not impossible. The ultimate measure, of course, lies in the ultimate outcome of planning and the delivery of goods and services to the disadvantaged elderly who need them.

RECOMMENDATION XI

Planning should be linked to the budget process and therefore, we recommend that a copy of the planning and priority strategies for the elderly be submitted to the elected and executive public officials who have a direct role in the budgeting and appropriations processes.

A. Administration Response

1. See #4 under Recommendations III.

B. Response of Study Panel

While recognizing the necessity of fiscal accountability, the Study Panel cites its reservations regarding over-dependence upon the budgetary process in planning and evaluation. Qualitative, non-budgetary considerations, must be taken into account by those responsible in any way for programs serving the elderly.

RECOMMENDATION XII

In the final analysis, planning in behalf of aging stems from the basic values of society. Those values are translated into goals, objectives and priorities. As planning for aging proceeds, it will be necessary to address these values and priorities. In planning the allocation of resources, we urge that the aging receive a fair share of national wealth. This should be accomplished through a reordering of priorities at all levels to increase the commitment of national resources to meet human needs.

A. Administration Response

"Between 1969 and 1974, outlays for Federal human resources programs have increased 97%, while total budget outlays have grown by only 46%. As a result, human resources spending now accounts for close to half the total budget dollar, compared with just over one-third of the total at the time I [the President] took office."

B. Response of Study Panel

The Study Panel reaffirms the recommendation.

It is the hope of the Panel that as a reordering of national priorities makes more funds available for human services, the elderly and their representatives will continue to place their cause before decision makers and seek an equitable share of national resources.

2. GOVERNMENT AND NON-GOVERNMENT ORGANIZATIONS

RECOMMENDATION I

Public agencies should be empowered and voluntary agencies encouraged, to undertake and/or pursue more vigorously the advocacy of older people's interests, drawing more fully upon direct communication with, and participation by, the elderly and/or their organizations and the general public.

A. Administration Response

1. "The President has launched and followed-up on a vigorous program to assure that nursing home patients get the kind and quality of care they need and deserve...(by) assisting states to establish nursing home patient ombudsman units. Five models have been developed for testing this year to assist States in setting up nursing home patient ombudsman units. Contracts with four States and a national organization have been completed. Pending the outcome of field tests, 954 Social Security District Offices were ordered to receive complaints from patients and relatives for forwarding to appropriate state agencies. More than 2,000 complaints have been acted upon to date."
2. "The President created the Domestic Council Cabinet-level Committee on Aging to respond to the needs of the elderly at the very highest level of government."
3. "The President has strengthened consumer advocacy at the Federal level by:
 - a. Creating an Office of Consumer Affairs in the Department of Health Education and Welfare with a mandate to intensify efforts on behalf of the consumer with special emphasis on programs to assist the older consumer.
 - b. Appointing the Director of the Office of Consumer Affairs to the Domestic Council Committee on Aging.
 - c. Appointing the Director of the Office of Consumer Affairs a full member of the Cost of Living Council, the cabinet-level body which sets the policies for the wage-price stabilization program."
4. "At the White House Conference on Aging, the President announced that he was establishing the position of Special Consultant to the President on Aging."

B. Response of Study Panel

While the steps reportedly taken by the Administration move us in the right direction, there is recognized to exist a clear need for the establishment of standards against which the effectiveness of ombudsman advocacy functions can be measured.

The Panel urges that the ombudsman function presently being demonstrated in nursing homes be continuously evaluated and that expansion of the concept, based on such an evaluation be guaranteed.

The Panel urges that adequate and appropriate manpower and resources, which may or may not mean additional staff, be provided so as to allow public agencies to effectively advocate the interests of those being served.

It is recognized, however, that continual monitoring and review by those other than the government agencies carrying out service functions, is necessary to ensure public agency responsiveness. The Federal Council on the Aging, as provided for in the Older Americans Comprehensive Services Amendments of 1972 would have well served this function.

In further response to this Recommendation, the Study Panel refers to its responses to Planning Recommendation I, VII, IX and X.

RECOMMENDATION II

At all levels of government, a central office on aging should be established in the Office of the Chief Executive, with responsibility for coordinating all programs and activities dealing with the aging, fostering coordination between governmental and non-governmental programs directly and indirectly engaged in the provision of services, and for planning, monitoring and evaluating services and programs. Each operating department should establish the post of Assistant Secretary for Aging with responsibility for maximizing the department's impact in relation to the needs of the older person. A coordinating council should be established in each central office of aging to be chaired by the director of the office and should include the several department assistants on aging.

At the Federal level, this central office should be implemented with the authority and funding levels and full-time staff needed to formulate and administer policy, and should be assisted by an advisory council, and should be required to make an accurate and comprehensive annual report on its progress in resolving problems and meeting goals. This White House level office should have enough prestige and resources to assure that it will encourage the development of parallel units at the State and community levels. . . .

A. Administration Response

1. See #2 and #4 under Recommendation I.

2. "As a result of action suggested by the Domestic Council Committee on Aging, the President will send a memorandum to each Department or Agency with responsibility for programs in the field of aging calling for the designation of a person to coordinate programs for older persons across departmental lines. This individual will report directly to the Secretary or agency head on these matters."
3. "The Secretary of Health, Education and Welfare has taken steps both to expand and to strengthen the Advisory Committee on Older Americans which was established by the Older Americans Act to advise the Secretary on all Departmental matters relating to older persons."
4. "The Undersecretaries' Group, acting on a recommendation of the Cabinet-level Committee on Aging, has specified that each Federal Regional Council should establish a committee on aging in order to accelerate the development of comprehensive and coordinated programs for the delivery of services to older persons at the community level."

B. Response of Study Panel

In response to Recommendation II, the Study Panel notes its similarity to Planning Recommendations II, III and V. The Panel, accordingly, refers to its response to these related Recommendations.

RECOMMENDATION III

Relationships between agencies in aging and other public agencies should be characterized by mutual adjustments and cooperation at all government levels and by durable joint agreement of responsibility for research, comprehensive planning, and provision of services and facilities, and should be based on and directly responsive to older Americans' opinions and desires at the grass roots level.

A. Administration Response

1. See Administration Response to Recommendation I.
2. "The Administration proposed amendments to Title III of the Older Americans Act which provide additional stimulus to planning and coordination."
3. "The President directed those agencies whose programs have a major impact on the lives of older persons to provide the Domestic Council Committee on Aging with the amounts they expect to spend during the current fiscal year in their respective programs."
4. "The Administration will take steps to improve coordination in the expenditure of funds from these (Federal) sources."

In furtherance of the coordination process, the Administration on Aging will provide information concerning Federal programs to the States so that it can be utilized in State and local planning. State aging agencies will also be able to transmit their views on proposed Federal programs within their States, thereby furthering the interchange of information and strengthening over all coordination.

B. Response of Study Panel

The Older Americans Comprehensive Services Amendments of 1972 are recognized to be geared toward increasing coordination, planning effectiveness and resource utilization at all levels of government and between the public and private sectors. Taken with the increased effort at coordination being displayed at the Federal level, as previously considered in response to Planning Recommendations II and V, the Administration response has been reasonable.

RECOMMENDATION IV

Governmental responsibility, particularly for providing funds and establishing standards, must be emphasized if the necessary facilities and services are to be made available to older people. The delivery of services should make maximum use of voluntary and private organizations which can meet the standards established by government in consultation with consumers and the providers of service.

A. Administration Response

1. "The Administration agrees with the delegates to the White House Conference that the non-government sector should be involved with government in the planning and implementation of programs for older persons."
2. "The Administration has proposed amendments to the Older Americans Act which would actively involve voluntary agencies in the establishment of comprehensive and coordinated systems for the delivery of social and nutritional services."
3. "The Administration, through the Administration on Aging, has enlisted the cooperation of the National Center for Voluntary Action to provide staff assistance for the Steering Committee of National Volunteer Organizations."
4. "The initiation of Project FIND in the summer of 1972 exemplifies the commitment of the Administration to facilitate the involvement of the non-government sector in programs for older persons."

B. Response of Study Panel

The Panel reaffirms the Recommendation, notes its similarity to Planning Recommendation III, and cites the reasonableness of the Administration's response. The Panel suggests, however, that in reference to the provision of services, increased attention should be paid to ensuring the availability and accessibility of needed services to all older people. Attention must also be paid to ensuring that standards governing the conduct of services be concerned with more than administrative, fiscal, structural details, but also with the quality of the human service being provided.

Project FIND and cooperation with the National Center for Voluntary Action represent reasonable Administration responses to the call for utilization of voluntary and private organizations in the delivery of services to older people. The potential for greatly increasing the involvement of the voluntary and private sector in the delivery of services at the State and local level is recognized to exist within the Older Americans Comprehensive Services Amendments of 1973.

RECOMMENDATION V

Overall agency activities in aging should be planned and organized to provide coordination and support in both vertical and horizontal dimensions. Local agencies should participate in the formulation of State plans; State agencies should participate in the formation of comprehensive plans and national policies. Such interrelatedness should include governmental and non-governmental organizations, private and voluntary agencies, and representatives of the elderly.

A. Administration Response

1. See #2 and #3 under Recommendation III.

B. Response of Study Panel

The Panel notes the similarity in content between this Recommendation and components of Planning Recommendations II, III, V, IX and X. Accordingly, it hereby references its responses to those recommendations.

RECOMMENDATION VI

Government, at all levels, should encourage and foster the participation of private enterprise and voluntary organizations, including those whose membership is drawn from among the elderly. Such efforts to meet the needs of older people should include: pilot research and demonstration projects, direct service programs, self-help programs, informational, educational and referral services, planning and training programs.

A. Administration Response

1. See #1, #2, and #3 under Recommendation IV.

B. Response of Study Panel

The Study Panel recognizes similarities between this Recommendation and Planning Recommendations III and V. Accordingly, it offers the same response.

RECOMMENDATION VII

Basic facilities and services should be provided as rights to which all older people are entitled and the opportunity to share these facilities and services ought to be available to all older people, while the adversely circumstanced must be entitled to special consideration.

A. Administration Response

1. "The Administration believes that programs in the field of aging must take into account the special circumstances that are unique to each minority group and the handicapped."

B. Response of Study Panel

In operational terms, both the Administration and Congress have disregarded the first sentence of this recommendation which says "basic facilities and services should be provided as rights to which all older people are entitled." Large segments of the population are effectively excluded from consideration when priority attention is given to the adversely circumstanced.

Pending the availability of programs and services for all older citizens, the Study Panel believes it to be proper and right that priority attention be given to those with greatest social and economic need. As set forth in its response to Planning Recommendations IX and X, the Study Panel believes that assuring appropriate attention to those who have neither political nor economic power is at once the dilemma and the promise of a democratic society. In this same vein, assuring appropriate attention to those aged who are adversely circumstanced by a number of factors not limited to race and economic status, is the commitment which our Nation must hold to those who have contributed to its development.

The Recommendation is reaffirmed. The Study Panel supports any actions taken to guarantee the availability of facilities and services to all older people, with immediate emphasis upon reaching those with greatest need.

RECOMMENDATION VIII

All efforts to meet the needs of older people, whether by governmental or private and voluntary agencies, should be consistent with: (a) The First Amendment freedoms of association and expression; (b) The right to participate in government-sponsored programs free from religious, racial, ethnic, and age discrimination; and (c) Protection of one's person and property, particularly in institutional settings.

A. Administration Response

1. "The Administration agrees with the delegates to the White House Conference on Aging that the provision of legal services, law enforcement and the protection of the civil rights of the elderly are essential to assuring the independence and dignity of older persons."
2. "The Administration will shortly propose legislation to establish a legal services corporation."

In making this announcement, the President stated "I shall soon propose legislation to the Congress to form a Legal Services Corporation constituted so as to permit its attorneys to practice according to the highest professional standards, provided with safeguards against politicization of its activities and held accountable to the people through appropriate monetary and evaluation procedures."

In the development of the proposal for submission to Congress and in its implementation upon enactment, consideration will be given to the needs of older persons.

3. "The Administration on Aging made a grant to the National Paralegal Institute of Washington, D.C. for preparing a curriculum to train older persons as paralegal assistants for work in neighborhood legal centers. It is expected that the curriculum will be used in community and junior colleges so that paralegal personnel can be trained throughout the country."
4. See #1 under Recommendation I.

4. "The Law Enforcement Assistance Administration is moving to reduce crime -- particularly for residents of public housing -- and to pinpoint the crimes experienced most often by older persons by:
- sponsoring a number of programs geared broadly to reduce crime, including block grants to the States, and discretionary and research projects.
 - presently conducting a nationwide survey to pinpoint crimes experienced most often by persons 65 years of age or older."

B. Response of Study Panel

No adequate response to this Recommendation has been made by the Administration. Cognizance of and respect for the rights of the older person, as a human being, a citizen, a property owner, a patient, must always characterize the efforts of the public and private sector in meeting the older person's needs.

The Panel strongly endorses expansion of the ombudsman concept. Wider adoption and extension of the ombudsman function are required to assure that the rights of the elderly are protected.

The Panel acknowledges that the research and demonstration efforts being undertaken by the Law Enforcement Assistance Administration will reveal some effective means of protecting the rights and property of the older individual. Until these and other legal and protective measures come to be realized in the daily living environment of all older persons, however, many will continue to live in fear.

RECOMMENDATION IX

The integration of governmental activities in the field of aging should be improved by the Federal agencies' showing greater appreciation of the fact that the principle of accountability applies from the Federal to the State level, as well as from the States to the Federal administration. Federal accountability to the States should provide sufficient lead time when Federal policy and administrative changes are to be announced, as well as prior consultation regarding changes in appropriations. Federal agencies also should improve their communication with State units on aging to provide advance clearance of direct Federal grants to individuals, organizations, and agencies.

A. Administration Response

1. See #4 under Recommendation III.

B. Response of Study Panel

The Study Panel strongly reaffirms the intent of this Recommendation. The principle of accountability applies from the Federal to the State level, as well as from the State to the Federal administration. The Study Panel especially notes increased efforts on the part of the Administration on Aging to support this principle. The Panel acknowledges that often times when instances of failure to provide advanced information to State agencies occur, they are due to the failure of structures above AoA to keep AoA fully informed. The Panel urges that open lines of communication be maintained.

As elaborated upon in the Study Panel's response to Planning Recommendations IX and X, good planning is dependent upon adequate knowledge and information. Thus, the success of a coordinated, comprehensive planning effort will be dependent upon the transmission of all necessary information. The effort underway to effect interagency coordination, including providing State agencies on aging with Federal funding projections and program review opportunities, should be fully implemented so as to realize its real benefits.

The Study Panel strongly endorses the provision for advanced funding contained within the Older Americans Comprehensive Services Amendments of 1973.

RECOMMENDATION X

A Special Committee on the Aging should be established in the United States House of Representatives, functioning in a comparable role to that of the United States Senate Special Committee on Aging.

A. Administration Response

1. "Most of the Conference Recommendations dealt with action required of the Federal Executive Branch of the government; responsibility for initiative and action on this particular suggestion obviously rests with the Members of the House of Representatives."

B. Response of Study Panel

A Special Committee on the Aging should be established within the U.S. House of Representatives. The Study Panel urges that the appropriate committees of the House of Representatives take such actions as necessary to create a House Committee on Aging.

RECOMMENDATION XI

National priorities must be reordered so as to allocate a greater share of our Nation's resources to meet the needs of its older citizens.

A. Administration Response

"Between 1969 and 1974, outlays for Federal human resources programs have increased 97%, while total budget outlays have grown by only 46%. As a result, human resources spending now accounts for close to half the total budget dollar, compared with just over one-third of the total at the time I [the President] took office."

B. Response of Study Panel

As in its response to Planning Recommendation XII, the Study Panel calls for a reordering of national priorities so as to increase the level of national resources available to meet human needs, especially those of our older citizens. The Panel recognizes that human resources spending has increased, but recommends that this process of placing even greater emphasis on meeting human needs must continue.

A major movement in the reordering of national priorities would be achieved if all older people were guaranteed an adequate annual income. The Study Panel calls attention to the fact that Delegates to the 1971 White House Conference on Aging overwhelmingly supported the principle that the elderly be guaranteed an annual income of \$3,000 for a single person and \$4,500 for a couple. The enactment of P.L. 92-603 that provides a Federally-financed income floor for older persons is a step in this direction, but supplemental payments must now be raised and extended to the levels called for by the Conference if a truly adequate income is to be provided for older persons.

RECOMMENDATION XII

Means should be found for a continuing conference on the aging to aid in the follow-up of the recommendations of this White House Conference on Aging, which also would extend beyond the announced follow-up year of 1972 and even until the next White House Conference on Aging.

A. Administration Response

No response.

B. Response of Study Panel

The work of the second White House Conference on Aging is not complete.

The Study Panel strongly feels that, in some form there should be created a post-Conference agency to aid in the Conference follow-up beyond the announced follow-up year. Such an agency, with appropriate financial resources and field staff, could undertake to gather information and stimulate additional action on White House Conference recommendations at the State and local level.

Continuation of the post of Special Consultant to the President on Aging and a Post Conference Board of the White House Conference on Aging, would ensure continued national visibility and advocacy on behalf of the older population.

RESEARCH AND TRAINING

STUDY PANEL REPORT
RESEARCH AND TRAINING
PREAMBLE

The Study Panel on Research and Training has reviewed responses to Conference recommendations to date and calls attention to the following highlights in the Panel's report.

- Policy for the nation in the field of aging must provide for the development of information in the interest of aging and for essential training of a sufficient number of people to implement that policy and deliver needed services. The Panel considers the following issues to be critical in regard to research and training:
- the existing inadequate support for research, and training, especially training, in the face of rapidly expanding needs for information about and services for the aged;
 - the need for an identifiable Federal focus to which national concerns about policy and procedures of relevance to the elderly can be directed and from which responses can be obtained;
 - the need for developing local and state support for gerontological research and training;
 - the need for widespread dissemination of information on what is known about aging and about training people to work with the elderly;
 - the need, in the face of expanding service programs, to develop acceptable standards of training for those expected to provide services and to evaluate the effectiveness of those services;
 - the need to create a National Institute on Aging.

Until there is a recognized agency identified with the field of aging and having appropriate status, funding, and autonomy, there will be an ineffective effort in the Federal Government in research and training in aging in the biomedical, behavioral, and social sciences. Centers or other units established within presently-constituted agencies are not adequate substitutes and will necessarily give aging research and training a secondary priority.

However, we applaud the first step the Administration is taking in the direction of coordinating Federal programs through

the Administration on Aging. We hope that the effort will fulfill its potential and ultimately result in improved coordination of efforts and increased support.

The study panel strongly disagrees with the assumptions which underlie the Administration's response to the White House Conference recommendations on research and training. The most critical assumption is that the expanding marketplace will operate to allocate sufficient resources for training in order to attract and retain an adequate supply of competent manpower in the field of aging and to develop new knowledge in the services of aging.

This assumption is not supported by experience. The Administration program is designed to rapidly expand services to the aging and funds are being allocated for this purpose. The absence of a concomitant program of research and training will make unlikely a commensurate development in improved services and methods or in the adequacy of manpower to provide these services. The result is the inevitable recruitment of an inadequately trained, insufficient number of workers.

A corollary assumption is that colleges and universities will allocate faculty and operating funds to research and training in aging. We disagree. Aging research and training are not well established in higher education and are unlikely to prosper in the absence of Federal, categorical support, particularly when most universities and colleges in the United States are already in serious financial difficulty and barely able to protect existing programs, much less develop new ones.

The Administration's response appears to place a great deal of emphasis on undergraduate training which is, of course, needed. However, there is much need for training at the graduate level in order to establish a resource for practice, research, and training for the future.

Experience suggests that recruitment of students to the field of aging, even with adequate financial incentives, is difficult. Without such incentives, the study panel believes an adequate flow of students into the field of aging is unlikely.

The study panel disagrees with and opposes the Administration's new policy regarding the termination of categorical support for training in aging and the cut-back in funds for research. The existing policy is inappropriately abrupt and inflexible and has reduced the capacity of colleges and universities to develop viable alternative programs which can insure the trained manpower necessary to implement the Administration's announced policy of improved services to the nation's elderly citizens.

The recommendations of the White House Conference on Aging are now over a year old. Rather than seeing these recommendations implemented, the Study Panel has seen a serious deterioration in the funds available for research and training in aging. The members of the panel recommend vigorous discussion of the above policy and their resolution at an early date.

1. RECOMMENDATIONS FROM SECTION ON RESEARCH

RECOMMENDATION I

It is recommended that a National Institute of Gerontology be established immediately to support and conduct research and training in the bio-medical and social-behavioral aspects of aging. The institute should include study sections with equitable representation of the various areas involved in aging research and training.

A. Administration Response

1. "The Administration will provide support for research, demonstration and training in the field of aging in a manner that is consistent with the overall policies which it has developed for Federal involvement in these activities."
2. "In the field of research the Administration is committed to a sharpening up of the Federal government's objectives in particular fields and then coordinating and focusing Federal resources on the achievement of these objectives."

The President set forth his convictions relative to the importance of research in the field of aging in his Message on Aging on March 23, 1972 when he said:

"It is important that the same scientific resources which have helped more people live longer lives now be applied to the challenge of making those lives full and rewarding for more Americans. Only through a wise investment in research now, can we be sure that our medical triumphs of the past will not lead to social tragedies in the future."

"What we need is a comprehensive, coordinated research program, one which includes disciplines ranging from biomedical research to transportation systems analysis, from psychology and sociology to management science and economics."

3. "The Administration will take steps to insure that the Federal departments and agencies that have resources available for research in aging work as a team in order to achieve the comprehensive, coordinated program referred to by the President in his message. The specific steps that will be taken to achieve this objective will be announced shortly.

There is in existence a Technical Advisory Committee on Aging Research. This Committee, made up of outstanding leaders from outside government, will make recommendations to the Administration directed toward the development of a meaningful program of research in aging."

"The Administration believes that the most effective means for the Federal Government to advance research in the field of aging is to tap all of the Federal government's resources and relate them to agreed-upon objectives. This process will result in the involvement of more leaders in more disciplines and the commitment of more resources than would be the case if an Institute on Research in Aging were to be located in just one of the many departments and agencies involved in research in aging. If an Institute should be created, there would be a natural tendency for other departments and agencies to feel that they had been relieved, at least partially, from some of their responsibilities. The Administration plans to move in just the opposite direction and take action which will impress on these agencies the importance of their responsibilities in the area of aging research."

B. Response of Study Panel

The most explicit Administration response to this Recommendation has been the President's statement accompanying the pocket veto of the bill establishing a National Institute on Aging. The argument made in that message that a new Institute would fragment existing research efforts in the field of aging does not impress the Panel, in view of the record of poor support for research on aging in the existing institutes.

At the 1971 White House Conference the arguments for such an Institute were thoroughly discussed. This recommendation for an Institute to be established immediately was a thoughtful one based upon the facts and reflected a serious concern which was originally raised as long ago as the 1961 White House Conference where the same recommendation was issued.

While the National Institute of Child Health and Human Development (NICHD) makes grants and supervises the conduct of research in the field of aging as a minor portion of its overall mission, this has been manifestly inadequate. As a result, the White House Conference recommended the establishment of a separate National Institute on Aging.

Until there is a recognized agency identified with the field of aging, and having appropriate status, funding, and autonomy, there will be an ineffective effort in the Federal Government in research and training in aging in the biomedical, behavioral and social sciences. Centers or other units established within presently-constituted agencies are not adequate substitutes and will necessarily give aging research and training a secondary priority. The existence of the Technical Advisory Committee on Aging Research, in itself, does not speak specifically to this Recommendation.

We affirm the Recommendation and call for those steps to be taken, including appropriate legislation, which will see the Recommendation implemented without further delay.

RECOMMENDATION II

It is recommended that the President propose and that the Congress create a position within the Executive Branch with sufficient support and authority to develop and coordinate, at all levels of the government, programs for the aged, including research and demonstration programs, and to oversee their translation into action.

A. Administration Response

1. " The President created the Domestic Council Cabinet-level Committee on Aging, to respond to the needs of the elderly at the very highest level of government. "
2. " Upon taking office, the President appointed the Commissioner of Aging to serve as his Special Assistant on Aging. "
3. " At the White House Conference on Aging, the President announced that he was establishing the position of Special Consultant to the President on Aging."

B. Response of Study Panel

The Panel recognizes the importance in meeting this Recommendation of the appointment of a Special Consultant on Aging to advise the President on matters concerning aging and the aged. Continuity of this position within the Executive Branch should be ensured, and adequate staffing should be provided to implement this role.

It is recognized that this role of Special Consultant needs to be given clearer definition, and that the appointee should continue to hold membership in the Domestic Council. The Office of Special Consultant, or whatever other title which may be used, should be independent and not held concurrently with any other position in the Executive Branch.

Congressional action was directed toward representing the problems and views of older persons by establishing a Federal Council on the Aging which would have provided a further method of accomplishing the goal of this Recommendation. A nationally representative group of informed and knowledgeable persons, provided with an adequate staff, would be a valuable adjunct to the Office of the Consultant to the President on Aging. Such a group might receive proposals and expressions of diverse interest which then might be better channeled to established as well as new programs in aging.

To implement this Recommendation, we proposed the retention of the Office of Special Consultant on Aging to advise the President and the establishment of a representative Federal Council on Aging.

RECOMMENDATION III

It is recommended that a major increase in Federal funds for research, research training, and demonstration be appropriated and allocated. Appropriation of general revenues for programs in the interests of older persons should contain additional funds amounting in the average to no less than 3.5 percent of such expenditures, these additional funds to be allocated for research, demonstration, and evaluation. Federal support of research and training in separate departments or schools within universities and separate research agencies should be continued and multidisciplinary and multi-institutional programs should be fostered.

A. Administration Response

See Administration Response to Recommendation I.

B. Response of Study Panel

The Panel endorses the support provided by the Administration as being helpful in the promotion of training for professional practice, teaching, and applied social research, as well as the evaluation of programs. However, much of the support for research and research training in the biomedical, social and psychological bases and problems of aging, comes from the National Institutes of Health and the National Institute of Mental Health, and we are dismayed that current levels of support for these activities are being reduced or eliminated. Higher levels of support are necessary for those agencies to carry forth the recommendations of the White House Conference on Aging.

The Panel, therefore, calls for implementation of proposals for increased support for the Administration on Aging and implementation of the recommendation for increased support for the National Institutes of Health and the National Institute of Mental Health.

That portion of the Recommendation calling for a fixed percentage of funds available to programs for older people to be allocated to research, demonstration, and evaluation was based upon the concept of an R&D strategy used in government and business. Since no response has been made, the development of such a strategy for aging is still being awaited. The recommendation is reaffirmed.

The Panel endorses the movement to develop a comprehensive, coordinated research program, including extramural research. The Panel notes that there has been established a Technical Advisory Committee on Aging Research and recommends that it be given the staff and resources necessary to carry out its charge to develop such a comprehensive, coordinated research plan, including intramural and extramural research.

The Panel also endorsed support for extramural research and training in multidisciplinary centers. It recommends implementation and special funding of programs for multidisciplinary research and training.

RECOMMENDATION IV

It is recommended that funds for research, training for research, and demonstrations should be allocated in the aggregate in such a manner that the above activities (Recommendation III), relevant to aging and the aged in racial and ethnic minority groups, be funded in an amount not less than their proportion of the total population. Attention should be given to the recruitment and training of minority group students to become competent researchers in gerontology. Minority groups would include but not be limited to the following: Blacks, Spanish-language Americans, American Indians, and Asian-Americans.

A. Administration Response

1. "The Administration believes that programs in the field of aging must take into account the special circumstances that are unique to each minority group and the handicapped."
2. "Other recommendations made by the delegates designed to deal with special circumstances unique to a particular minority group will be the subject of special studies by the appropriate Departments or agencies."

B. Response of Study Panel

The Study Panel notes that, with respect to providing research training opportunities for minority students, this Recommendation is paralleled closely by Recommendation VII of the Training Section. Panel comment is presented in connection with that Recommendation.

The Panel finds little evidence of commitment to support training or for research on the problems of the aged among minority groups. We recommend that support be provided for programs which recruit persons from minority groups for training and research activities.

RECOMMENDATION V

High priority should be given to the recruitment and training of capable women and the representation of such women in bodies which have responsibility for allocation of training and research funds.

A. Administration Response

1. No response.

B. Response of Study Panel

The Panel supports the principle of affirmative action and urges that this be explicitly extended to the field of aging.

RECOMMENDATION VI

The Administration on Aging, or other appropriate clearinghouse, should be charged with and allocated adequate resources for collecting and disseminating current research findings in the field of the aging and for making these findings relevant and available to practitioners.

A. Administration Response

1. No response.

B. Response of Study Panel

The Study Panel stresses the importance of disseminating new knowledge in the field of aging. Such knowledge should be made available promptly to research workers, teachers, program planners, administrators, and practitioners. The Panel notes, however, that there has been no response to the recommendation. Accordingly, the Recommendation is reaffirmed. We support the intent of the legislation to amend the Older Americans Act which would create such a clearinghouse.

RECOMMENDATION VII

Appropriated Federal research, demonstration, and training funds should be apportioned and allocated promptly; programs for which such funds are appropriated, whether intramural or extramural, should be implemented with adequate staff without delay.

A. Administration Response

1. No response.

B. Response of Study Panel

The Study Panel strongly supports the recommendation that funds appropriated for research, demonstration and training should be made available for intramural or extramural projects as expeditiously as possible.

RECOMMENDATION VIII

More adequate procedures should be developed within the Federal Government to assure the continued operation and funding of those Federally funded demonstration projects which have been successful after evaluation.

A. Administration Response

1. "The Administration is prepared to work with States, local communities and the private sector in a new effort to bring into existence comprehensive coordinated service programs for older persons at the community level. These programs should be designed to enable older persons to maintain their independence by remaining in their own homes or other places of residence.

The Administration believes that the Federal, State or local financial resources that are available provide a significant opportunity to increase the number of communities with comprehensive and coordinated service programs for older persons. Federal financing can be made available through a combination of significant programs, namely: (1) the Older Americans Act; (2) the Adult Services provision of the Social Security Act; (3) General Revenue Sharing."

B. Response of Study Panel

The Panel views with concern the problem of continuing support for projects which have been demonstrated to be valuable. Revenue sharing, for example, may be a way of continuing such valuable programs but there is insufficient evidence to indicate that consideration is being given to aging in revenue sharing. The whole history of this area suggests that when the aging must compete for funds, they receive less than their fair share.

The Panel reaffirms the Recommendation. A method must be found for continuing major Federal government support for services to the elderly which have been proven to be effective.

2. RECOMMENDATIONS FROM SECTION ON TRAINING*RECOMMENDATION I*

A fully developed training policy must focus on both the immediate needs of the present aged population and the future needs of the aging, through innovation of far reaching policies and programs. To accomplish the training of needed personnel, the present levels of funding in all government agencies concerned with aging must be substantially increased immediately in order to increase the supply of all types of manpower; technicians, paraprofessionals, professionals, planners, researchers, teachers, and volunteers. Training must be conducted in appropriate settings both within and outside of educational institutions.

A. Administration Response

1. "Institutions of higher education will be helped in attracting persons to and preparing them for careers in aging through the policy of providing financial assistance for students in higher education with the understanding that they will then be free to use this assistance in order to pursue any specialized program they desire to pursue.

Consistent with this policy, the President's 1974 Budget includes full funding for a new program of basic opportunity grants for undergraduate education authorized by the Education Amendments of 1972. In addition, work-study funds and guaranteed and subsidized student loans will be available for both undergraduate and graduate training.

It is estimated that 1.5 million undergraduate students will receive \$959 million under the basic opportunity grants program; that 1,673,000 undergraduate and graduate students will obtain guaranteed student loans with many of the undergraduates in this group also receiving basic opportunity grants; that 545,000 undergraduate and graduate students will be employed in workstudy programs; and, that colleges and universities will be in a position to make direct loans to approximately 259,000 undergraduate and graduate students. These Federal programs will be supplemented by public and private scholarship and loan programs.

Support for students already enrolled in specialized training programs, including those in the field of aging, has been provided for the academic year 1973-74. New students pursuing specialized training, including the field of aging, during that academic year and both new and continuing students beginning academic year 1974-75 and thereafter, will receive financial assistance from the Federal government if they qualify for the general student assistance program outlined above.

It is the Administration's belief that the Federal government's general student assistance program, public and private scholarship and loan programs, family savings and income from work will together remove the financial problem as a barrier to higher education.

It is also the Administration's belief that the rapidly unfolding and attractive career opportunities in the field of aging, the need for trained personnel, and the increasing number of persons who have developed a strong desire to participate in the field of aging will all combine to increase substantially the number of undergraduate and graduate students, for whom financial barriers have been removed, who will decide to participate in higher education training programs in the field of aging. In most instances these decisions will be based on a strong commitment to the field of aging rather than on the conclusion that the financial assistance for a training program in aging is more attractive than a training program in some other area.

This trend can be accelerated by developing and making available to both undergraduate and graduate students better information on career opportunities in aging and better supply-demand data. The trend can and will be accelerated also as a result of the continuing implementation of the two Federal policies discussed below."

2. "Institutions of higher learning will be helped in attracting persons to and preparing them for careers in aging by the policy of providing central coordination of the Federal government's program of research in aging so that the large investment of resources in this area will be related to agreed-upon objectives.

The President's directive to develop a comprehensive and coordinated research and demonstration program for the field of aging will have the following results for colleges and universities.

- It will provide them with a clear picture of the Federal government's objectives
- It will make clear how each Federal department and agency fits into these objectives
- It will identify the sums available to the Federal departments and agencies for research and demonstration programs in aging
- It will spell out the procedures to be followed by the colleges and universities that have the competency and the desire to participate in the programs of one or more of the agencies.

If a college or university receives grants for participation in one or more of the Federal government's research programs it will have the following results in the area of training for work in the field of aging:

- The meaningful involvement of the college or university in this aspect of the field of aging -- with financial support from the Federal government -- will capture the attention of both undergraduate and graduate students and will help to attract them to the field of aging.
 - The budgets on which the grants will be based will provide for compensating faculty members for that portion of their time spent on the project or projects and will help, therefore, to attract and retain scholars in the field of gerontology.
 - The budgets on which the grants will be based will provide for involving and compensating both undergraduate and graduate students for participation in the projects and will help, therefore, to provide them with worthwhile learning experiences and additional financial resources."
3. "Institutions of higher learning will be helped in attracting persons to and preparing them for careers in aging by the policy of using Federal dollars to encourage the development of comprehensive and coordinated service programs for older persons.

The initiation, strengthening and expansion of such programs in many communities will have the following results for colleges and universities:

- It will provide them the opportunity to become involved in State, area and community planning for the coordinated delivery of essential services to older persons.
- It will provide them the opportunity to offer courses for older persons as a part of the comprehensive service programs.
- It will provide them the opportunity to offer both short-term and long-term programs to train or update the training of persons who operate the service programs for older persons.

If a college or university decides to take advantage of the opportunities for service to the field of aging provided by the development of these comprehensive community-based service programs for older persons, it will have the following results in the area of training for work in the field of aging:

- The meaningful involvement of the college or university in these community-based service programs will capture the attention of both undergraduate and graduate students and will help to attract them to the field of aging.
 - Undergraduate and graduate students will have opportunities for being involved in both the planning and operation of these programs and, as a result, will learn by doing and, at the same time, add to their financial resources.
 - Fees paid for participation in courses for older persons and in short-term and long-term training programs for those who are recruited to operate the service programs for older persons will help to strengthen the financial base of the institution's total program in the field of gerontology."
4. Colleges and universities will from time to time have the opportunity to participate in training programs designed to meet the specific needs of Federal departments and agencies for trained personnel in aging.

The Department of Health, Education, and Welfare, for example, helped to establish a nationwide network of training programs designed to increase the knowledge and to improve the skills of personnel engaged in providing patient care in nursing homes. Training for at least 40,000 nursing home staff members is programmed for completion by July of 1974.

In addition, university-based training for State nursing home surveyors has been completed for 1,000 surveyors.

Under the Federal Employees Training Act, to take another example, Federal agencies can finance the cost of making it possible for personnel working in the field of aging to obtain necessary specialized training in aging from colleges and universities."

5. "The Administration will provide a focal point within the governmental structure for those colleges and universities that have made or will make a commitment to the field of aging.

The purpose of providing this focal point is to assist such institutions in working with the Federal departments and agencies that:

- are capable of providing information relative to opportunities for careers in aging, both inside and outside of their departments
- are deeply involved in research and demonstration programs in the field of aging
- are responsible for taking the lead in persuading and helping states and communities to expand comprehensive and coordinated service programs for older persons
- are in need of assistance from colleges and universities in order to meet their own specific needs for trained personnel in the field of aging

In this manner, coupled with the general student assistance program, the Administration believes that the Federal Government can help colleges and universities sponsor significant scholarly activities in gerontology and, at the same time, play a major role in responding to manpower demands as they develop in the field of aging."

B. Response of Study Panel

The Study Panel strongly disagrees with the assumptions which underlie the Administration's response. The most critical of these assumptions is that the "educational marketplace" will allocate sufficient resources for training in aging which will result in an adequate supply of trained manpower for the field of aging. A corollary assumption is that colleges and universities will allocate faculty and operating funds to research and training programs in aging despite the fact that such programs are not now well established in such institutions in the absence of Federal categorical support. Furthermore, the response appears to place primary emphasis on undergraduate training, whereas most of the needed professional and research training is at the graduate level.

Colleges and universities can only make commitments to programs for which there is a reasonable expectation of continuity. They are unlikely to do this on the basis of the ad hoc arrangements suggested in the Administration's response.

Experience suggests that the recruitment of students to aging, even with adequate direct financial incentives, is difficult.

Without such incentives, the Panel believes that there will be a reduced flow of students into the field, which will seriously threaten the effectiveness of service and research programs.

In the Panel's opinion, Recommendation I was a call for increased Federal support of categorical training in aging, and it reaffirms the Recommendation in that spirit.

RECOMMENDATION II

Given that training in aging is lagging seriously behind the proven need, there is consensus that responsibility for the development of a vigorous national plan and continuing monitoring of training of manpower in aging should be lodged in a new Federal agency for aging adequately financed and with the power to coordinate all Federally supported training programs in aging.

A. Administration Response

1. " The President created the Domestic Council Cabinet-level Committee on Aging to respond to the needs of the elderly at the very highest level of government.

This was established as a working committee which, among other duties, was charged with the responsibility of developing government-wide aging policy and making sure that the President's decisions in the field of aging were carried out."

2. " At the White House Conference on Aging, the President announced that he was establishing the position of Special Consultant to the President on Aging."
3. "The Administration on Aging has been moved to the Office of the Secretary of Health, Education and Welfare within the Office of the Assistant Secretary for Human Development."

B. Response of Study Panel

The Study Panel commends the steps being taken to increase coordination of all Federally-supported programs in aging, including training programs.

Such efforts do not effectively implement the Recommendation. Moving closer to the goal expressed therein were the provisions of the proposed amendments to Older Americans Act. That vetoed Act required the Commissioner on Aging to make continuing appraisals of the Nation's existing and future personnel needs in the field of aging and the adequacy of the Nation's efforts to meet these needs. Such an appraisal should be made without delay.

Section 201 (16) and Section 402 of the proposed Older Americans Comprehensive Service Amendments of 1973 are responsive to this recommendation and are endorsed by the Panel. Section 201 (16) provides for the Commissioner of the Administration on Aging, to be established in the Office of the Secretary of the Department of Health, Education, and Welfare, to develop, in coordination with other agencies, a national plan for meeting the needs for training persons for carrying out programs related to the purpose of the Act, and to conduct and provide for the conduct of such training.

Section 402 specifically requires the Commissioner to appraise the Nation's existing and future personnel needs in the field of aging and the adequacy of the Nation's efforts to meet these needs. Furthermore, it requires the Commissioner to prepare and publish annually a report on the professions dealing with the problems of the aging, in which he would detail his view on the state of such professions, the future complexion of programs for the aging throughout the Nation, and the funds and the needs for well-educated personnel to staff such programs. To be included within the Commissioner's report must be his plan for allocation of Federal assistance under Title IV in relation to the plans and programs of other Federal agencies.

RECOMMENDATION III

In discharging its responsibilities, the new Federal agency should include representatives of training organizations, private non-profit foundations, scientific and professional organizations, organizations of older and retired persons, and other concerned groups in all planning bodies which formulate policies on training.

A. Administration Response

1. " The Secretary of Health, Education and Welfare has taken steps both to expand and to strengthen the Advisory Committee on Older Americans which was established by the Older Americans Act to advise the Secretary on all Departmental matters relating to older persons. "
2. See #3, plus discussion, under Recommendation I.

B. Response of Study Panel

The intent of the Recommendation is that there should be specific mechanisms by which the types of organizations listed should be able to make inputs into the development of Federal policy on training in aging.

The Panel recognizes the potential which exists within the newly created Federal Council on the Aging, authorized under the Older Americans Comprehensive Services Amendments of 1973: The Council provided for in this legislation will, among other functions, assist the Commissioner in making his appraisal of the manpower needs and the adequacy of the Nation's efforts to meet these needs and would review, on a continuing basis, Federal policies, programs, and activities to appraise their value and impact on the lives of Older Americans.

RECOMMENDATION IV

Multidisciplinary research and training centers of excellence in gerontology with a relationship to service-delivery systems should be developed, and research and training should be fostered in a wide range of colleges, universities, and other institutions. Innovative and experimental efforts in training must be encouraged. Each center should develop a network of effective relationships with other educational and service agencies to disseminate information and promote implementation of activities in aging.

A. Administration Response

1. See Administration Response to Recommendation I.

B. Response of Study Panel

Provisions for establishing multi-disciplinary centers of gerontology for training and research, as authorized under the newly passed Amendments to the Older Americans Act, and the authorization for a National Institute on Aging, are responsive to both the call for the establishment of such centers and the call for the establishment within such centers of effective working relationships with service delivery programs and educational programs.

The Panel reaffirms the Recommendation and cites the need for interagency communication of the type the Administration proposes to engage in, to accomplish the joint support, in such centers, of programs for training and research in aging.

RECOMMENDATION V

In addition to increased Federal support for training programs in aging there should be an acceleration of support for training in aging from State appropriations, foundation grants, private donations, and regular agency budgets. All service programs for older people should contain earmarked funds for the training of personnel.

A. Administration Response

1. See Administration Response to Recommendation I.

B. Response of Study Panel

The Study Panel disagrees with the Administration's policy for phasing out categorical support for training in aging by June 30, 1974. Furthermore, in the Panel's opinion, the timing and inflexibility of HEW guidelines for implementing the phase out has created undue hardship on college and university programs in aging, and reduced their ability to survive as viable agents to participate in the emerging new policy.

The Panel reaffirms the Recommendation that Federal and State appropriations and support from foundations and other private sources provide for accelerated training support.

RECOMMENDATION VI

Funds for recruitment and support of personnel to be trained in aging should be allocated without priority based on sex or age. Special inducements--traineeships, scholarships, tuition grants, loans--should be offered in order to recruit personnel (particularly those from ethnic and minority groups) into careers in aging.

and

RECOMMENDATION VII

Because of the needs and problems that exist among the aging of the economically and socially disadvantaged, funds should be earmarked at all levels of training and research for Blacks, Chicanos, Puerto Ricans, Asians, Indian, and other disadvantaged groups. All training programs funded on Federal, State and community levels should actively recruit faculty and trainees from these groups.

A. Administration Response

1. "The Administration believes that programs in the field of aging must take into account the special circumstances that are unique to each minority group and the handicapped."
2. "Other recommendations made by the delegates designed to deal with special circumstances unique to a particular minority group will be the subject of special studies by the appropriate Departments or agencies."
3. See also Administration Response to Recommendation I.

B. Response of Study Panel

The basic response of the Panel is incorporated in the response to Recommendation V. As a result of the Administration's overall policy on training, it will be impossible to implement this recommendation.

The Panel reaffirms the Recommendations and recommends, further, that special attention be given to financial support levels for financially disadvantaged and minority group students. The Panel urges that all training programs take affirmative action to increase access for women to teaching positions and to training opportunities.

RECOMMENDATION VIII

In order to develop adequately trained persons in health, allied health, and other professional fields such as law, architecture, social work, etc., subject matter on aging must be inserted into preservice and inservice curricula of professional schools immediately. In addition, emphasis should be placed on the development of community college level certificate and degree programs and programs in vocational and technical institutes as well as other local programs for personnel who deliver services to the older population. Teacher training programs should include positive concepts regarding the aging process and the older person for incorporation into elementary and secondary school curricula.

A. Administration Response

1. "Consistent with the resources that may be available at any given period of time, the Administration will work with State and local governments and the private sector in order to facilitate progress in the following areas of activity... (by) developing a better understanding of aging and the aged by preparing materials for the media and including appropriate materials in the curriculum at all levels of education."
2. See also #5 under Recommendation I.

B. Response of Study Panel

The Study Panel urges that agencies and institutions preparing professionals and other personnel for services to older persons take vigorous action to foster professional training, especially in view of the Administration's policy to reduce training in this area.

1

RECOMMENDATION IX

We urge the creation of an adequately funded National Institute of Gerontology for training and research. A substantial portion of the funds allocated to it should be earmarked for training.

A. Administration Response

1. "There is in existence a Technical Advisory Committee on Aging Research. This Committee, made up of outstanding leaders from outside government, will make recommendations to the Administration directed toward the development of a meaningful program of research in aging."

B. Response of Study Panel

The Study Panel finds that this Recommendation is virtually the same as Research Recommendation No. I. Accordingly, its response to this Training Recommendation is the same as that for the Research Recommendation. In essence, the Panel recognizes that no progress has been made in implementation and urges the enactment of legislation to create a National Institute on Aging authorized to support gerontological training in the basic disciplines and for the health professions.

RECOMMENDATION X

A national data bank and retrieval system similar to or parallel with the education research information center (ERIC) should be established to convert, translate, interpret, and make available all research knowledge and curriculum materials in aging to all training and research and demonstration programs.

A. Administration Response

1. No response.

B. Response of Study Panel

The Study Panel noted the strong similarity between this Recommendation and Research Recommendation No. VI. The Panel is seriously concerned that there has been no Administration response in spite of the obvious need and reaffirms both Recommendations.

RECOMMENDATION XI

Recruitment and training will be to no avail if there is no corresponding increase in services. Therefore, recruiting should be related to useful job opportunities. Financial support for new service positions should be provided in balance with support of training programs.

A. Administration Response

1. " The Administration is prepared to work with States, local communities and the private sector in a new effort to bring into existence comprehensive coordinated service programs for older persons at the community level. These programs should be designed to enable older persons to maintain their independence by remaining in their own homes or other places of residence.

The Administration believes that the Federal, State or local financial resources that are available provide a significant opportunity to increase the number of communities with comprehensive and coordinated service programs for older persons. Federal financing can be made available through a combination of significant programs, namely: (1) the Older Americans Act; (2) the Adult Services provisions of the Social Security Act; and (3) General Revenue Sharing."

B. Response of Study Panel

The Study Panel equates this Recommendation with part of Research Recommendation No. III; an appropriate balance should be established among services, research, and training in the field of aging. However, the development of new service programs now threaten to develop new job opportunities far more rapidly than appropriate training can be provided.

The Panel shares the concern of both Conference Sections and urges actions as may be necessary to implement the recommendations.

RECOMMENDATION XII

To insure the dedication of the Federal Government and our country in this period to life as opposed to death, we strongly urge Congress to reorder its priorities and divert funds from the military to human needs.

A. Administration Response

"Between 1969 and 1974, outlays for Federal human resources programs have increased 97%, while total budget outlays have grown by only 46%. As a result, human resources spending now accounts for close to half the total budget dollar, compared with just over one-third of the total at the time I (the President) took office."

B. Response of Study Panel

The Study Panel noted that the Training Section was not alone in recommending that national priorities be reordered to divert resources from the military to human needs. The Panel reaffirms the recommendation.

Concluding Statement

The Study Panel on Training recognizes the need and value of continuing an organization such as the Post Conference Board of the White House Conference on Aging, to review action taken on Conference recommendations throughout the next few years. The creation of such a group is recommended.

The Panel urges that some means be found to secure the financial support necessary to implement this recommendation.

RETIREMENT ROLES AND ACTIVITIES

STUDY PANEL REPORT
RETIREMENT ROLES AND ACTIVITIES

Preamble

As changes in American society continue with greater frequency and intensity, it is essential that greater recognition be given to the fact that these changes have a greater impact on the lives of older persons. While many programs have been instituted that were intended to assist the elderly develop meaningful participation in life, changes continually alter the needs of the elderly and those who will someday be older. Thus, constant study must be undertaken to assess the consequences of societal change, particularly as it affects older persons and to use this knowledge to improve their well being.

It is generally acknowledged that social roles reflect a person's status and position in a social structure and that society has traditionally defined these roles within the context of the family and work. However, it is becoming increasingly clear that after the termination of rather clear cut role performance in these two areas, opportunities for continuance of former roles and for the development of new roles, must be made possible. Consequently new approaches, new language and conceptual frameworks are required to explore the possibilities for new roles and functions and to enable society to assist persons in discovering and assuming these orientations. "Education at all levels must be a key component of any strategy in attempting to deal with this problem.

A pressing need currently exists to develop, at an early age, a positive view of older persons' roles in American society. Education is also essential in assisting the elderly to adapt to ever-changing social norms and values.

The panel therefore strongly recommends a careful study of existing efforts to develop meaningful opportunities for involvement for older persons in society. It further emphasizes the need for continuing reappraisal of such efforts, especially in the light of a rapidly changing society.

RECOMMENDATION I

Society--Through Government, private industry, labor, voluntary organizations, religious institutions, families and older individuals--must exercise its responsibility to create a public awareness of changing life styles and commitments in a continuous life cycle. Together they should discover and implement social innovations as vehicles for older persons to continue in, return to, or assume roles of their choice. These innovations should provide meaningful participation and leadership in Government, cultural activities, industry, labor, welfare, education, religious organizations, recreation and all aspects of volunteer services.

Implementation---Programs at Federal, State and local levels which provide opportunities for community service by older persons should be strengthened and expanded.

Mechanisms should be developed for continuing the work of successful demonstration programs, until such programs become unnecessary or self-sustaining.

Older people should not be further isolated. Attention must be paid to making opportunities for community service accessible as well as available to all older persons.

A. Administration Response

1. "Essentially, all the Administration's actions are aimed at this goal, of increasing meaningful participation in life, and in place of isolation for older persons "provide instead continuing opportunities for them to be self-reliant and involved."

2. "This Administration further believes that Government at all levels, as well as private industry, should facilitate the employment, not only of older workers between the ages of 45 and 65, but also those over 65. In support of this conviction, this Administration has taken the following actions to remove obstacles to employment and create opportunities for involvement in both the private and public sectors."
- a. "The President has signed P.L. 92-603 (H.R. 1), as a comprehensive Social Security bill containing provisions which liberalize the earnings test provisions in the Social Security Act."
 - b. "This Administration is moving to eliminate age discrimination in employment."
 - c. "The Department of Labor is assisting middle-aged and older workers in their transition from forced job displacement into suitable jobs or retirement."
 - d. "This Administration is opening up employment opportunities for older workers."
 - "The President has demonstrated his determination to help those over 65 by doubling the amount of money for manpower programs for older workers."
 - "The President also directed the Secretary of Labor to urge States and communities to hire persons over 65 under the Emergency Employment Act, a temporary two-year program to hire about 150,000 people each year in public services."
 - "In addition, the President asked the Labor Department to work with public employment offices to open job opportunities for those over 65, including part-time job opportunities, both in the public and private sectors."
 - "The Office of Economic Opportunity, through its Senior Opportunities and Services (SOS) program also has carried forward a manpower program to enable the elderly to earn more income."
 - "The Administration on Aging has issued regulations for the new Nutrition for the Elderly Program which provide, as called for in the law, for employment preference for persons 60 and over."
 - e. "This Administration believes that local governments should give full consideration to the use of available Federal funds, e.g., the Older Americans Act,

- the Adult Services titles of the Social Security Act and General Revenue Sharing to help older persons continue to be involved in society either through employment or voluntary service."
- f. "The President has markedly expanded volunteer programs for the elderly administered by ACTION."
- "Pursuant to the President's request, the Congress voted to double the funding for the Foster Grandparents program."
 - "At the same time, the President also asked for tripling ACTION agency funds for the Retired Senior Volunteer Program (RSVP) so that as many as 75,000 senior volunteers could be involved in community services. The Congress approved this request."
 - "In addition, the Administration has asked the Congress to enact legislation which would enable the Action agency to expand the Foster Grandparent Program authority so as to provide opportunities to older volunteers to provide supportive services to persons with exceptional needs in various settings, especially services to other older persons in nursing homes, their own homes, or other community settings."
- g. "The Administration is providing volunteer opportunities for Older Americans in other Federally-assisted programs."
- "The Social and Rehabilitation Service (SRS) of the Department of Health, Education and Welfare, in cooperation with the American Nursing Association, is promoting volunteer services for the elderly."
 - "The Veterans Administration provides volunteer opportunities for the elderly in more than 25 services in its medical program."
- h. "The Office of Education and the Inter-Agency Council on the Arts and Crafts are working on a five-year plan to help the elderly fill their leisure time with creative activities."
- i. "The Administration has taken steps to improve coordination among the many non-Federal volunteer activities which affect the aging."

- j. "The Federal Civil Service System now incorporates substantial flexibility on retirement age."
- k. "Several Departments operate programs of one year trial retirements for those who might like to retire early but lack confidence concerning their ability to make the necessary adjustments. This program aims to keep open the option to return to work should adjustment fail."

B. Response of Study Panel

We believe that the Administration should include the Section's preamble in their assessment, which emphasizes that income, housing and health are essential if older persons are to have meaningful participation in this society.

The panel supports and commends the new legislative initiatives as positive efforts to expand community roles for older persons, though it hopes the time will come when programs will not have to be limited on the basis of income, and that people of all walks of life will be able to participate. To further this hope, the panel recommends that increased efforts be undertaken to expand these opportunities for involvement.

The panel commends SRS for its initiative in working with the American Nursing Association but urges it to expand its efforts and work with other professional groups who might be able to assist older persons in assuming new roles in society. Furthermore, we would urge other government agencies to follow SRS's lead and attempt to develop ways in which to undertake similar efforts.

Federal Departments operating one year trial retirement programs should be highly commended. However, these Departments should conduct employee evaluations of their programs, and then disseminate the results. In this manner other Departments, agencies and organizations might be stimulated to develop such programs, while learning from previous experience others have had with them.

The Office of Education and National Arts and Crafts Council efforts mark a unique approach, and any programs that transmit cultures should be actively encouraged.

A clearer distinction should be made between demonstration and necessary projects. New does not mean demonstration, and when a need is determined, community service programs rather than demonstration programs should be established.

Therefore, we recommend that the Administration undertake an evaluation of current programs, with the aim of separating program functions. One possible separation might be:

- (1) Seed money programs, with specific funding deadlines, after which the community must assume the cost;
- (2) True demonstration projects, designed solely to evaluate new techniques;
- (3) Need programs that become integrated within a community's social fabric, and are provided with on-going funding.

RECOMMENDATION II

Program efforts to meet role problems and to create new role opportunities should be designed to serve all segments of the older population. Priorities should be determined according to local and individual needs; special effort must be made to include persons who might otherwise be excluded--the impoverished, the socially isolated, the ethnic minorities, the disabled and the disadvantaged.

A. Administration Response

"The Administration believes programs in the field of aging must take into account the special circumstances of minority groups and the handicapped. It has therefore, taken the following steps:

1. "On the recommendation of the Cabinet-level Committee on Aging, the Administration on Aging will require State planning groups on aging to include representatives or minority groups on their advisory bodies."
2. "The Cabinet-level Committee on Aging has recommended to the President that he direct the Federal agencies in the field of aging to develop provisions comparable to those contained in the Nutrition Program for the Elderly under the Older Americans Act which provide that, to the extent feasible, grants serving and operated by minority groups will be awarded in proportion to their relative numbers in the states."
3. "The Administration has taken several steps to ensure that Federal, regional and area offices are staffed with persons sensitive to the problems of minority groups."

"In addition, the Administration has expanded its commitment to the interests of minority groups by directing other government agencies, especially those with primary responsibility for dealing with the elderly, e.g., Social and Rehabilitation Service, Social Security Administration, U.S. Department of Agriculture and the Office of Economic Opportunity, to make certain that the regional and district offices are staffed with individuals sensitive to minority group problems, and who possess the language ability to deal effectively with the problems of the elderly from minority groups within their specific areas."

4. "Minority groups are respresented on the Post-Conference Board of the White House Conference on Aging."
5. "The Cabinet-level Committee on Aging has recommended to the President that he direct all Departments and agencies to collect and evaluate data concerning the participation of minority groups in Federally funded programs for the aged."
6. "Other recommendations made by the delegates designed to deal with special circumstances unique to a particular minority group will be the subject of special studies by the appropriate Departments or agencies."
7. "The Office of Management and Budget devotes considerable time and effort to making sure that Federal programs in aging are reaching all Americans -- including minorities -- in an equitable fashion."
8. "The Administration will encourage local communities to include in their plans for coordinated services for older persons programs designed: (1) to assist in the rehabilitation of the elderly handicapped; (2) to help the elderly handicapped remain in their own homes or other places of residence; and, (3) to provide the elderly handicapped with opportunities for continued involvement in life through full-time or part-time employment or through volunteer activities."
9. "The Rehabilitation Services Administration has funded projects designed to rehabilitate elderly disabled poor and to place them in remunerative employment."
10. "The Rehabilitation Services Administration is making it possible for persons in private and public agencies working with the handicapped to participate in short-term training courses -- courses which are focusing on the implementation of recommendations made by the delegates to the White House Conference."
11. "The Department of Health, Education and Welfare, consumer organizations, and related professional associations have initiated a program designed to focus appropriate resources on dealing with the health, education and welfare problems associated with deafness -- including the problems of aged deaf persons."
12. "The Rehabilitation Services Administration is funding demonstration projects to staff special rehabilitation adjustment centers for the geriatric blind."
13. "The Veterans Administration is engaged in a wide variety of programs to assist aging patients who are blind or have a severe visual impairment."

14. "The Veterans Administration is expanding its facilities to care for speech and language disorders."
15. "The Veterans Administration is working to help overcome the problem of hearing impairment."

B. Response of Study Panel

The Administration's efforts have substantially met the basic thrust of the Recommendation. To further the progress that has been made, the Panel urges the Administration to continue its action in this field, and thereby assure all older persons meaningful role opportunities.

The Panel urges that architectural standards that meet the needs of the elderly handicapped should be applied to all public buildings, and encouraged for all buildings.

Rehabilitation and training for the elderly handicapped should focus primarily on social adjustment. Employment and volunteer roles should be viewed only as desirable by-products of such rehabilitation.

RECOMMENDATION III

Society should adopt a policy of preparation for retirement, leisure, and education for life off the job. The private and public sectors should adopt and expand programs to prepare persons to understand and benefit from the changes produced by retirement. Programs should be developed with Government at all levels, educational systems, religious institutions, recreation departments, business, and labor to provide opportunities for the acquisition of the necessary attitudes, skills and knowledge to assure successful living. Retirement and leisure time planning begins with the early years and continues through life.

Implementation---While retirement preparation is both an individual and total community responsibility, every employer has a major responsibility for providing preparation-for-retirement programs during the working hours.

The function of Social Security district offices should be expanded to include the additional role of offering individual pre-retirement counseling.

A. Administration Response

1. "Administration believes that pre-retirement education should become an integral part of the personnel policies of employers in both the public and private sectors."
2. "The Departments and agencies of the Federal Government will be urged to set an example for other employers by initiating or strengthening pre-retirement programs under the leadership of the U.S. Civil Service Commission."

3. "The Administration will support the use of funds by the Administration on Aging to conduct, in coordination with the Office of Education, model projects for pre-retirement education."
4. "The Departments of Labor and Commerce will provide leadership designed to add significantly to the numbers of employers who provide pre-retirement education for their employees."
5. "The Administration on Aging, in cooperation with the Office of Education, will develop materials designed to identify the roles that educational institutions at all levels are equipped to perform in the field of pre-retirement."
6. "The President directed the Social Security Administration offices to expand their information and referral services for the elderly."

"Each of the 959 Social Security offices -- constituting the field network distributed throughout the Nation -- is required to maintain a resource file of all community services, as well as information about State, county, and Federal programs. The Social Security Administration also has 3,500 sub-district contact stations."
7. "The President directed the Domestic Council Committee on Aging to examine ways in which to use other government offices -- such as the General Services Administration's Federal Information Centers and the Agriculture Cooperative Extension Service's local offices -- in further expanding and improving information and referral services."

B. Response of Study Panel

While the Administration's response is adequate in terms of providing pre-retirement information about retirement, it is inadequate in meeting the post-retirement needs of older persons. Therefore, the Panel urges that increased attention be given to this aspect of retired life.

The Panel acknowledges the fact that certain Federal Departments, like the Veterans Administration and HEW, have established pre-retirement programs during working hours.

We urge the Federal Government to expand its offices and establish preparation for retirement programs during working hours universally throughout the Federal Government. Furthermore, since the Federal Government does establish employer guidelines in such areas as civil rights and minimum wages, the panel believes that it would be appropriate for it to develop guidelines for pre-retirement programs during working hours, and thus encourages it to do so.

The panel favors the Administration's action establishing district Social Security offices as sources of information dispersal, but believes that further study should be given to the provision of individual pre-retirement counseling by district offices.

RECOMMENDATION IV

Social policy should encourage families to assume the responsibility for providing supportive services to older family members; however, society must insure the availability through government and community organizations to all older people of comprehensive supportive services which they are unable to provide independently.

Implementation---The Federal Government should move immediately to develop models for a network of supportive services for all elderly citizens. Implementation should be the ultimate responsibility of the local community.

In funding supportive services, Federal funds should be provided to applicant agencies and local communities as well as State organizations. The availability of such services should be made known thru a program of public information.

A. Administration Response

1. "The Administration is prepared to work with States, local communities and the private sector in a major drive to bring into existence a system of comprehensive coordinated service programs for older persons at the community level."
2. "The Administration believes that the Federal, State or local financial resources that are available provide a significant opportunity to increase the number of communities with comprehensive and coordinated service programs for older persons. Federal financing can be made available through a combination of significant programs, namely: (1) the Older Americans Act; (2) the Adult Services provision of the Social Security Act; (3) General Revenue Sharing. In addition, Allied Services legislation is under consideration in HEW which would assist Governors in developing the capacities in State and local governments, as well as in private non-profit agencies to plan integrated service programs that are more responsive to the needs of families and individuals, including the elderly."

- a. "President Nixon has submitted a plan to the Congress for strengthening and expanding service delivery programs under the Older Americans Act."
 - b. "Proposed increasing the budget for Federal support of nutrition programs and Title III projects to \$200 million."
 - c. "Asked the Congress to extend the Older Americans Act indefinitely."
 - d. "Submitted amendments to the Congress that strengthen the service delivery component of the Older Americans Act to further assure independence."
 - e. "Under the Adult Services provisions of the Social Security Act, the Federal government provides funds to pay 75 percent of the cost of services that enable older persons receiving public assistance to remain in their homes or return to their residence after hospitalization."
 - f. "Under General Revenue Sharing, substantial sums could be used by both State and local governments to support coordinated and comprehensive service programs for older persons."
3. "The Social Security Amendments of 1972 included a number of provisions which should contribute substantially to the independence of older persons and to their ability to live in their own homes."
 4. "The Veterans Administration continues to develop new techniques to help older persons remain independent in their own homes or other places of residence."
 5. "A National Health Service Corps has been established which should help provide health services to the elderly in many inner city and remote rural areas currently lacking professional medical assistance."
 6. "The Administration has spearheaded a national voluntary effort in a program to help older men and women in 300 communities live dignified lives in the familiar settings of their own homes."
 7. "The Department of Housing and Urban Development is funding demonstration programs to improve tenant services provided by local communities to residents in public housing, including the elderly."
 8. "The Administration proposed amendments to Title III of the Older Americans Act to provide additional stimulus to planning and coordination."

9. "This Administration is committed to bringing about more effective planning and coordination of Federal programs in the field of aging and to encouraging the coordination of Federal resources with those made available by State and local governments and by private agencies."
10. "The President directed those agencies whose programs have a major impact on the lives of older persons to provide the Domestic Council Committee on Aging with the amounts they expect to spend during the current fiscal year in their respective programs."
11. "The Administration will take steps to improve coordination in the expenditure of funds from these sources."

B. Response of Study Panel

The placing of a ceiling on the Adult Services provisions of the Social Security Act tends to halt the expansion of comprehensive coordinated service programs at the community level.

While the panel respects the integrity of local decision-making, the Federal Government might use its influence with local officials to encourage assigning a portion of revenue sharing funds to increased community services for older persons. It should also move to acquaint and alert older persons with the possibilities revenue sharing offers.

The Veteran's Administrations and the National Health Service Corps programs are both commendable, but they should each be substantially increased in scope in order to have a real impact.

The panel recognizes the Administration's initiatives as new efforts to develop an effective network of supportive services. However, it continues to be concerned that the major emphasis of these efforts is placed on administrative planning and coordination rather than the provision of direct services.

RECOMMENDATION V

Public policy should encourage and promote opportunities for the greater involvement of older people in community and civic affairs, and for their participation in formulating goals and policies on their own behalf as a basis for making the transition from work to leisure roles. Society should re-appraise the current life style sequence of student/worker/retiree roles, and promote role flexibility.

A. Administration Response

1. "Proposed amendments to the Older Americans Act that would actively involve older persons."
2. "The Secretary of Health, Education and Welfare has issued regulations under the new Nutrition Program for the Elderly which are designed to assure, in accordance with the law, that nutrition projects are established and administered with the advice of persons competent in the field of nutrition."
3. "Both prior to and since the White House Conference on Aging, the Chairman of the Conference has consulted with the Washington representatives of the national organizations of older persons."
4. "The Secretary of Health, Education and Welfare has provided for the expansion and strengthening of the Advisory Committee on Older Americans -- a committee which, with the exception of the Chairman and Vice Chairman -- is made up of persons from outside government."

B. Response of Study Panel

The basic Administration initiatives serve to implement the spirit of the recommendation.

Yet while these efforts involve older persons in formulating goals and policies for programs that affect them directly, additional efforts need to be undertaken to ensure that older persons are involved in the formulation of all community programs. The panel thus encourages the Federal Government to urge all levels of government to promote increased involvement of older persons in community affairs.

The Office of Education and other Federal agencies concerned with education and the development of societal values should be aware of the need to re-appraise the current life-style sequence.

RECOMMENDATION VI

We recognize that many problems of aging Americans are problems for all Americans, and we urge the Conference to request the re-ordering of the nation's priorities.

All citizens will benefit from elimination of poverty, preservation of the environment, more adequate health care services, better housing, transportation and the control of disease and physical disability.

Therefore, we recommend that the Chairman of the 1971 White House Conference on Aging appoint a select committee of Delegates to prepare a preamble for action which calls for a re-ordering of our nation's priorities, and that recognizes that the strength and success of America will be judged on how well the need of its own people are served.

A. Administration Response

1. "As directed by the President, a Post Conference Board of the White House Conference on Aging has been created."
2. "At its first meeting, the Post Conference Board adopted a resolution to create a series of study panels paralleling the major topics discussed at the Conference."

"These study panels are now at work studying the actions taken by the Federal government, State and local governments, and private organizations to implement the Conference recommendations. Reports from the study panels, analyzing action taken to date and offering strategies designed to bring about further action will be considered by the full Board at a meeting on April 27 and 28, 1973, and the results of their deliberations will be issued as soon thereafter as possible."

B. Response of Study Panel

The Administration should study this recommendation again with the idea that the Conference Chairman will call together a group of Delegates to carry out this request.

RECOMMENDATION VII

We recommend that the President and the Congress, either by Executive Order or by Congressional action, give immediate priority to the restructuring of the Administration on Aging and its establishment as a visible, effective advocate agency for the elderly at the highest level of government so that it will directly relate to the Executive Office of the President.

A. Administration Response

1. "The President created the Domestic Council Cabinet-level Committee on Aging to respond to the needs of the elderly at the very highest level of government."
2. "The President appointed, at the White House, both a Special Consultant and Special Assistant on Aging."
3. "The Secretary of Health, Education and Welfare has taken steps both to expand and to strengthen the Advisory Committee on Older Americans which was established by the Older Americans Act to advise the Secretary on all Departmental matters relating to older persons."
4. "In addition, the Secretary has also appointed a new Technical Advisory Committee for Aging Research. The members of this committee are from the private sector. In order to contribute to both their effectiveness and their independence, the Secretary has provided both of these committees with their own staffs."
5. "The Administration on Aging has been moved to the Office of the Secretary of Health, Education and Welfare within the office of the Assistant Secretary for Human Development."

B. Response of Study Panel

The Administration and Congress should be commended for their prompt action. The panel feels that in the long run the action by the Congress of elevating the status of AoA will have more enduring effects in serving the interests of older persons. Nonetheless, both actions, coupled with AoA's budget increase, will improve the institutional responsiveness of governments to the needs of the elderly.

RECOMMENDATION VIII

Since older persons have special needs, we recommend that public programs specifically designed for the elderly should receive categorical support for the elderly, rather than compelling the aged to compete for services, activities, and facilities intended for the general population.

A. Administration Response

1. "The Administration is prepared to work with States, local communities and the private sector in a new effort to bring into existence comprehensive coordinated service programs for older persons at the community level."

"The Administration believes that the Federal, State or local financial resources that are available provide a significant opportunity to increase the number of communities with comprehensive and coordinated service programs for older persons. Federal financing can be made available through a combination of significant programs, namely: (1) the Older Americans Act; (2) the Adult Services provision of the Social Security Act; (3) General Revenue Sharing. In addition, Allied Services legislation is under consideration in HEW which would assist Governors in developing the capacities in State and local governments, as well as in private non-profit agencies, to plan integrated service programs that are more responsive to the needs of families and individuals, including the elderly."

B. Response of Study Panel

The panel believes that current categorical grant programs should be continued. However, the Administration should also continue to monitor all Federal funds to ensure that older persons receive a fair share of government services.

RECOMMENDATION IX

It should be the responsibility of the Federal Government, in cooperation with other levels of Government, to provide funds for the establishment, construction and operation of community oriented multi-service centers designed for older citizens. Industry, labor, voluntary and religious organizations should assist in the planning and implementation.

A. Administration Response

1. "The Administration agrees with the conviction of the Conference delegates that greater emphasis should be given to the establishment of community level facilities to provide services for the elderly."
2. "The Administration believes that local governments should give full consideration to the use of available Federal funds--e.g., the Older Americans Act, the Adult Services titles of the Social Security Act, General Revenue Sharing and the proposed Better Communities Act--to make Senior Centers and the services provided through them available to a greater percentage of older persons."

B. Response of Study Panel

The Older Americans Act of 1972 was a step in the right direction in implementing the establishment, construction, and operation of community oriented, multi-service centers. The 1973 Act, as passed, will offer similar authorization figures in the recent Act. However, we hope that authorizations for the construction of new facilities will be included in the Act as soon as possible.

The Panel acknowledges that opportunities also exist for localities to utilize the available Federal funds referred to by the Administration to establish, construct, and operate multi-service centers for older persons.

RECOMMENDATION X

In order to encourage further activity on the part of older Americans, it is recommended that the work means test be modified so as to allow unlimited earnings without the reduction of Social Security benefits.

A. Administration Response

1. "The President has signed P.L. 92-603 (H.R. 1), as a comprehensive Social Security bill containing provisions which liberalize the earnings test provisions in the Social Security Act. "
2. "The President has signed legislation which liberalizes the earnings test and assures Social Security beneficiaries that the more money they earn, the more spendable income they will have.

Under prior law, Social Security benefits were not paid in full to people under age 72 who worked and earned more than \$1,680 (the annual exempt amount) in a year. If annual earnings exceeded \$1,680, benefits were reduced by \$1 for each \$2 of earnings between \$1,680 and \$2,880, but above \$2,880, \$1 in benefits was withheld for each \$1 of earnings. Under this provision, some older people chose not to increase their earnings because of the dollar-for-dollar reduction of benefits with respect to earnings over \$2,880. The President has signed legislation which increases to \$2,100 the amount a Social Security beneficiary can earn in 1973 and later years without having payments reduced. This recent legislation provides that the exempt amount will be automatically increased in the future to keep pace with increases in average wages covered under Social Security. In addition, only \$1 in benefits will be withheld for each \$2 earned above \$2,100 no matter how high the earnings might be so that there will be no dollar-for-dollar reduction in benefits as now occurs with respect to earnings above \$2,880. This assures that the more a Social Security beneficiary earns, the more spendable income he will have."

B. Response of Study Panel

The panel commends the movement to increase the limit of the work means test, but hopes that the goal of abolishing the test will be adopted by the Administration.

RECOMMENDATION XI

The information media are so important in the formation of public attitudes that it is recommended that special attention be given to enhancing the image of older persons, and to disseminating the recommendations of the 1971 White House Conference on Aging and its follow-up activities.

A. Administration Response

1. "Older persons are the victims of a lack of understanding of both aging and the aged. They will continue to be the victims of "ageism" until this situation is corrected. Both the communications and educational communities can help improve understanding. This Administration plans to consult and work with leaders in the communications and educational fields in an effort to transform talk into action."

B. Response of Study Panel

The Administration should continue their efforts to persuade the media to enhance the image of older persons, with particular attention given to discussions with the FCC, the major networks, the National Association of Broadcasters, and the Advertising Council.

The Administration should recruit older persons to assist these efforts.

RECOMMENDATION XII

The Administration on Aging should arrange for the publication of status reports to the Delegates, at six-month intervals, on action taken on the recommendations of the 1971 White House Conference on Aging.

A. Administration Response

1. See #1 and #2 under Recommendation VI.

B. Response of Study Panel

The panel is concerned with integrating a reporting mechanism within the structure of government. In view of the fact that Post Conference Board of the White House Conference on Aging will be disbanded in May, 1973 it is urgent that AoA immediately be given the responsibility for compiling and distributing periodic reports to the Delegates and the public at large on action taken on WHCoA recommendations.

RECOMMENDATION XIII

Training and research agencies, including university programs which relate to recreation and leisure, should be encouraged to concern themselves with the needs of older persons as an integral part of their training curriculum.

A. Administration Response

1. "The Department of Health, Education and Welfare is currently financing the training of nursing home personnel to recognize and deal with emotional problems faced by patients in long-term care institutions.

While specific actions are being taken to up-grade the quality of nursing home care through higher standards of care, attention is also being given to developing programs reflecting the total needs of patients.

Some of the funds appropriated for training of nursing home personnel are being used to develop special programs for teaching nursing home personnel to recognize the emotional problems faced by patients who must live in long-term care institutions and to demonstrate to the nursing care staff methods of care to alleviate these problems. These programs to enhance the psychological aspects of patient care are being developed in cooperation with some of the Federally funded community mental health centers as demonstration programs. Five programs of this type are currently being developed. Also regional office staff are encouraging many mental health clinics and programs to increase their services to patients in nursing homes and to participate in inservice education programs."

B. Response of Study Panel

The Panel believes that HEW's efforts to attune nursing home personnel to the needs of older persons is a good illustration of what can be done. It regrets the Administration's recent cuts in financing Research and Training in the field of aging, however, and urges that these efforts to sensitize professionals to the needs of older persons must be substantially broadened.

RECOMMENDATION XIV

We endorse a program looking toward continuing physical fitness of men and women before and during the years of retirement. Such a program should be implemented by Governmental support in cooperation with voluntary agencies which have a long history of experience in this field.

A. Administration Response

No response.

B. Response of Study Panel

The panel believes that the Administration should investigate the potential of implementing this recommendation through the President's Commission on Physical Fitness.

RECOMMENDATION XV

Because reciprocity often does not permit the full use of elderly professionals whose services are badly needed, we urge the National Conference of Commissioners on Uniform State Laws, in cooperation with the professions, to develop and promulgate a minimum national standard for admission to the medical, dental, legal and other professions, which standard permits quality professional practice, and that each State adopt such a uniform standard of professional practice.

A. Administration Response

No response.

B. Response of Study Panel

The panel directs the Administrations attention to the cause of this recommendation--currently there is no reciprocity between states regarding admission standards for the professions. We therefore urge that the Administration take steps to alert the States to the critical nature of this problem, and encourage the development of minimum national admission standards, so that older persons may continue to function in familiar roles and society will be able to make use of their professional skills and experience.

SPIRITUAL WELL BEING

STUDY PANEL REPORT
SPIRITUAL WELL-BEINGPreamble

The Study Panel on Spiritual Support for the Elderly recognizes with deep appreciation the enthusiastic response from all over the nation to the purposes and goals of the 1971 White House Conference on Aging.

Attention has been drawn to the many individual groups that are actively engaged in promoting and executing the recommendations on spiritual well-being generated by the Conference Section on Spiritual Well-Being, the Special Concerns Sessions on the Older Family, the religious community and the aging. One of the most far reaching responses to the Conference has been the organization of the National Interfaith Coalition on Aging with present membership of major religious bodies (Protestant, Roman Catholic, Jewish and Orthodox) in the United States. The express purpose of the Coalition is to help carry out all the recommendations proposed by the Conference Delegates.

The unique format of the 1971 White House Conference on Aging to wit, the preconference year on planning which reached down to the grassroot levels, the conference year which brought together 3,400 delegates and the post conference year of action provides us with the conviction that these efforts should not terminate with the post conference year.

The Conference Delegates recognized that physical, social and emotional needs are as much an integral part of the spiritual well-being of individuals as are the religious philosophies, concerns, outlooks and values to which they are committed. Most of the recommendations of the White House Conference on Aging, therefore, relate to the foundational supports which are needed to satisfy the needs of the total person. The Study Panel has reviewed the actions taken by the Federal government and private sector in relationship to the extent to which they have been or can be expected to strengthen the fabric of these foundations. In mapping further strategies to bring about more extensive action, the Study Panel has given special consideration to measures which place practical responsibility for leadership and action in the family and non-government sectors of this society.

RECOMMENDATION I

The government should cooperate with religious bodies and private agencies to help meet the spiritual needs of the elderly, but, in doing so, should observe the principle of separation of Church and State.

A. Administration Response

1. "The Administration is in agreement with the delegates to the White House Conference that the non-government sector should be involved with government in the planning and implementation of programs for older persons."
2. "The Administration proposed amendments to the Older Americans Act which would actively involve the private sector in the establishment of comprehensive and coordinated systems for the delivery of social and nutritional services."
3. "The Secretary of Health, Education and Welfare has issued regulations under the new Nutrition Program for the Elderly which are designed to assure, in accordance with the law, that nutrition projects are established and administered with the advice of persons competent in the field of nutrition, of older persons who themselves will participate in the program, and of persons who are knowledgeable with regard to the needs of older persons."

B. Response of Study Panel

The Administration has reaffirmed its position of the need for cooperative effort between government and non-government organizations in the planning and provision of the services needed by elderly persons. The Study Panel believes that religiously oriented organizations and other interested organizations should recognize their current opportunity to become partners in the development of comprehensive systems for the delivery of social services to older people in the need of them and should take action to this end.

RECOMMENDATION II

The government should cooperate with religious organizations and concerned social and educational agencies to provide research and professional training in matters of spiritual well-being to those who deliver services to the aging.

and

RECOMMENDATION III

It is recommended that the government provide financial assistance for the training of clergy, professional workers, and volunteers to develop special understanding and competency in satisfying the spiritual needs of the aging.

A. Administration Response

1. "Administration policies in the following areas will help institutions of higher learning to initiate, strengthen and expand programs designed to attract persons to and prepare them for careers in the field of aging:
 - a. Providing financial assistance for students in higher education with the understanding that they will then be free to use this assistance in order to pursue any specialized program they desire to pursue.
 - b. Providing central coordination for the Federal government's programs of research in aging so that the large investment of resources in this area will be related to agreed-upon objectives.
 - c. Using Federal dollars to encourage the development of comprehensive and coordinated service programs for older persons at the community level."

B. Response of Study Panel

The Administration's policies are seen as effective tools for the implementation of the delegates' recommendations II and III which call for research in matters of spiritual well-being and the training of clergy, professional workers and volunteers who deliver services to older adults.

It is suggested that under these policies seminaries, The College of Chaplains, schools of social work, home economics and family life be encouraged by religious groups, national organizations, state and local governments, and private and public agencies to develop training programs which include strong gerontological components with particular attention to the spiritual support needs of the elderly. Likewise, such private agencies and organizations as family social services and the National Interfaith Coalition on Aging should be encouraged to undertake short-term in service training of persons already providing counselling and support to the elderly.

Qualities of "professional, scholarly, and creative goals for expanding, developing and enriching" the lives of the elderly might well serve as criteria for evaluating proposals and awarding grants to those persons and organizations that seek to carry on research or provide training related to the spiritual needs of older people.

RECOMMENDATION IV

It is recommended that all licensing agencies in the State require that institutions caring for the aged must provide adequate chaplaincy services. In certain instances in which cooperating church organizations cannot obtain financial support for such service, government should be empowered to supply it upon the recommendations of the State commission on aging or other appropriate agencies.

A. Administration Response

None

B. Response of Study Panel

The recommendations by the White House Conference on Aging delegates that institutions caring for the aged provide adequate chaplaincy services is a valid one, and it is a type of service that is sorely needed in many instances. "Chaplaincy" should not be "hit or miss" visits by various clergy but should be a continuing and regular service to all residents or patients seeking or amenable to counseling, comfort and support by professionally prepared people. State agencies charged with licensing institutions caring for the aged should not only add chaplaincy and counseling services to the requirements for obtaining a license but also must monitor the institutions to see that the service meets the standards suggested above. Religious organizations individually and in groups must urge and convince state agencies to implement this recommendation.

It is recognized that religious organizations in this country traditionally have the primary responsibility for providing trained personnel to give spiritual support to elderly individuals confined in institutions. Religious congregations are woefully negligent if they ignore their aged parishioners. However, if the resources of congregations are not adequate to provide chaplaincy services especially when there may be a concentration of elderly people, ways should be sought by religious organizations, private agencies and state and local governments to supply men and women who could provide support in the way of counseling encouragement and comfort.

The need for chaplaincy services is seen as an opportunity to use the skills and experience of retired clergy, social workers and other with the requisite professional skills if their transportation and incidental expenses could be covered by other sources than from the religious congregations. The Study Panel recommends that Action study the possibilities of establishing a special program or the adaptation of RSVP for this purpose.

RECOMMENDATION V

It is recommended that the Federal Government should establish a continuing system of evaluation of present and proposed government-funded programs serving the elderly. One of the functions of such a system would be a determination of a program's effect upon the spiritual well-being of the elderly.

A. Administration Response

1. "The Administration proposed amendments to Title III of the Older Americans Act which provide additional stimulus to planning and coordination.

Under the proposed amendments, the Administration on Aging would establish general priorities which would serve as guides to activities at the State and local levels. States would establish objectives and create planning and service areas throughout the State within which ongoing program resources could be targeted to meet the service needs of the elderly. Agencies at the State and local levels would then mobilize and coordinate public and private resources to meet the objectives. The Federal government would have the responsibility of approving State plans."

2. "The President directed those agencies whose programs have a major impact on the lives of older persons to provide the Domestic Council Committee on Aging with the amounts they expect to spend during the current fiscal year in their respective programs."
3. "The Administration will take steps to improve coordination in the expenditure of funds from these sources."

B. Response of Study Panel

The establishment of the Federal Council on Aging which is called for in the Older Americans Comprehensive Services Amendments of 1973 was a response to the recommendation that the government establish a continuing system of evaluation of present and proposed government funded programs servicing the elderly.

It is strongly recommended that at least one of the men and women appointed by the President would represent the religious community.

RECOMMENDATION VI

It is recommended that a much greater, more diverse information flow is necessary to acquaint the elderly with all the services which are available to them. Social Security Administration should be required to disseminate adequately the information necessary to acquaint the elderly with all the services which are available to them, such as by enclosing information with Social Security checks.

A. Administration Response

1. "The Administration has been working to improve communications between the Federal government and older Americans and to alert the government to areas of special need."
2. "The President directed the Social Security Administration offices to expand their information and referral services for the elderly.

Each of the 959 Social Security offices--constituting the field network distributed throughout the Nation--is required to maintain a resource file of all community services, as well as information about State, county, and Federal programs. The Social Security Administration also has 3,500 sub-district contact stations.

With respect to Federal programs, each Social Security district office has been supplied with the "Catalog of Federal Domestic Assistance," and has been instructed regarding its use."

3. "The President launched Project FIND -- a major outreach effort to identify older Americans who are 'lost to Society.'

On August 3, 1972, a brochure describing federal food assistance programs was mailed [to accompany Social Security checks] to roughly 21 million older persons."

4. "The President directed the Domestic Council Committee on Aging to examine ways in which to use other government offices -- such as the General Services Administration's Federal Information Centers and the Agriculture Cooperative Extension Service's local offices -- in further expanding and improving information and referral services.

The Administration on Aging with the cooperation of the Social Security Administration and Office of Economic Opportunity is conducting a statewide research and demonstration program in Wisconsin to test various information and referral sites, including four Social Security Offices, in terms of their effectiveness in meeting the needs of older persons."

" The Office of Education's Bureau of Libraries and Learning Resources has funded research and demonstration projects in two branch libraries in five metropolitan areas -- Atlanta, Cleveland, Detroit, Houston, and Queens Borough -- to test the relevance of libraries as information centers in neighborhoods. A relationship between the library and statewide research and demonstration programs for interchange of findings has been established."

B. Response of Study Panel

The goal set by the Federal government to improve the communications between the Federal government and older Americans is commendable and must be an on-going effort. It responds in the spirit of the recommendation framed by the delegates to the White House Conference on Aging that there must be a much greater and more diverse flow of information to the elderly to acquaint them with all the services available to them.

However, the emphasis on Project FIND which used the distribution of social security checks to enroll eligible Americans in food assistance programs may have been overemphasized as an example of a response to the recommendation from the Panel on Spiritual Well-Being. An objective evaluation should be made of the recent enclosures with the social security checks to see whether this is a satisfactory method of communicating with older persons and whether the practice should be expanded or modified. The Federal government must continue to explore and assess other means of communicating with the elderly.

The inclusion of information in the social security checks did not respond to the whole intent of the original recommendation. The directives to the Social Security Administration offices to maintain a resource file of all community services as well as information about State, county, and federal programs is seen as a good beginning especially if extensive resource files are compiled, kept-up-to-date and made readily available. The personnel in the 3,422 contact stations of the Social Security Administration should also have local resource files and help people visiting their stations make use of the resources and services listed.

The Administration on Aging should set as one of its criteria in its function of review and evaluation of programs and activities of the Federal government to see that information about them is sufficiently supplied on a multilingual basis to the elderly.

¹ It is suggested that extra care and follow-up be taken so that people "found" during Project Find are placed permanently on the files and assisted in receiving any other services they might need.

RECOMMENDATION VII

Efforts should be made to meet the spiritual needs of the aging by ministering to them in conjunction with people of all ages, as well as in groups with special needs. It is noted that special attention should be given to allowing older persons to share in the planning and implementations of all programs related to them.

A. Administration Response

1. "The Administration has proposed amendments to the Older Americans Act which would actively involve the private sector in the establishment of comprehensive and coordinated systems for the delivery of social and nutritional services.

These amendments also call for special attention to be given to assuring opportunities for the involvement of older persons in the planning of these systems. Guidelines for use by State and sub-State planning agencies will be disseminated to the States once the amendments have been enacted into law. "

2. "The Secretary of Health, Education and Welfare has issued regulations under the new Nutrition Program for the Elderly which are designed to assure, in accordance with the law, that nutrition projects are established and administered with the advice of persons competent in the field of nutrition, of older persons who themselves will participate in the program, and of persons who are knowledgeable with regard to the needs of older persons."
3. "Both prior to and since the White House Conference on Aging, the Chairman of the Conference has consulted with the Washington representatives of the national organizations of older persons."
4. "The Secretary of Health, Education and Welfare has provided for the expansion and strengthening of the Advisory Committee on Older Americans -- a committee which, with the exception of the Chairman and Vice Chairman -- is made up of persons from outside government."
5. "In addition, the Secretary has also appointed a new Technical Advisory Committee for Aging Research. The members of this committee are from the private sector. In order to contribute to both their effectiveness and their independence, the Secretary has provided both of these committees with their own staffs."

B. Response of Study Panel

The recommendation that the spiritual needs of the aging should be ministered to in conjunction with people of all ages, as well as in groups with special needs can only be reiterated. Religious bodies have a particular and very special role to perform and should design their ministry to the aged in their congregations both as a special group and as a part of the larger body. It is felt that a religious organization's spiritual support of its elderly members will be more beneficial if the elderly are always included in all activities in the life of congregations; and conversely, if the other age cohorts and families assist in the ministry to the aged, they themselves will be better prepared for aging and retirement.

The Federal government's role is seen as paralleling that of the religious groups in that it must write the legislation and design programs that benefit all age groups but must remain aware at the same time of the special needs of the elderly.

The Administration is to be applauded for the specific requirements which respond precisely to the recommendation that special attention should be directed to insuring that older people share in the planning and implementation of all programs related to them.

Directives from the Office of Economic Opportunity were particularly good examples of how to involve older people not only in the planning but also in the implementation of actual activities; it is felt that programs such as Foster Grandparents could benefit if the income restrictions for volunteers could be dropped so that men and women from all social-economic levels could work in them.

The Federal government is setting an excellent example in its legislation, directive and guidelines. No organizations can overlook the resources of experience and skills in older persons nor can they afford not to involve them in planning and implementing programs in which they are involved.

RECOMMENDATION VIII

As a part of total programming for older persons, communities should make available religious or other spiritual consultation to the aged in their own homes, using the clergy and other trained persons. Special emphasis shall be given to assist and utilize personnel of those religious bodies lacking financial resources often available to larger groups.

A. Administration Response

None

B. Response of Study Panel

Possibilities are seen for implementing the recommendation that communities should make religious and other spiritual consultation available to the aged in their own homes if such aid and support is included as a part of the plans for comprehensive services to people in their own homes.

It is suggested that the National Interfaith Coalition on Aging work with religious groups to assess whether their aged members are confined to their own homes because they can not get to service or because they can not negotiate architectural hazards in the buildings where the services are held.

Citizens Advisory boards in model cities should test the idea by including services which can be seen as contributing to spiritual well-being such as friendly visiting and counseling.

RECOMMENDATION IX

Since man is a whole being with inter-related and interdependent needs, religious organizations should be actively concerned with spiritual, personal and social needs.

A. Administration Response

None

B. Response of Study Panel

The National Interfaith Coalition on Aging came out of the recognition that few organizations are better equipped than religious bodies to help carry out the recommendations of the White House Conference on Aging. Since man is a whole being with interrelated and interdependent needs, religious organizations should be actively concerned with his spiritual, personal, and social needs. It is felt that the Coalition and any similar efforts should receive both public and private support for their activities. Individual religious bodies are urged to work both individually and collectively.

RECOMMENDATION X

Religious organizations must be aware of agencies and services, other than their own, which can provide a complete ministry to older persons. Other organizations designed for the benefit of older persons should develop, as a part of their services, channels to persons and agencies who can help in spiritual problems.

A. Administration Response

None

B. Response of Study Panel

Religious bodies are urged to work for the elderly in light of what the community is planning to do. It is suggested that if religious organizations are involved in comprehensive service planning they will be implementing the recommendation that religious organizations be aware of services and agencies for the elderly other than their own.

Religious organizations are urged to appoint a person responsible for social concerns for the elderly at the congregational level, the level of presbyteries, dioceses, judicatories, conferences, etc. and at the national level.

The National Interfaith Coalition is commended for its plan to catalogue the services and programs for older people now being offered by all religious bodies. The existence of such an inventory will result in these services being used and with analysis where services are needed or can be better coordinated. The National Interfaith Coalition is urged to make the catalogue available not only to its constituent bodies but also to other private organizations, and local, state and Federal government.

RECOMMENDATION XI

Religious bodies should exercise a strong advocacy role in meeting the needs of the elderly, working for programs, both public and private, that contribute to the well-being of the elderly and protect them from those who would victimize or demean them.

A. Administration Response

None

B. Response of Study Panel

All parts of religious organizations from individuals in the local congregations to the national leadership must act as advocates for the needs of the elderly by working for public and private programs that contribute to their well-being. The religious organizations can and must take a leadership roll in all programs affecting the elderly. The National Interfaith Coalition, one of whose primary objectives is to develop an awareness of and to vitalize the role of congregations with respect to their responsibilities in improving the quality of life for the aging, is one channel through which local and national religious bodies can exercise their advocacy. The formation of an Interfaith Legislative Screening Committee to counsel with the U.S. Senate Special Committee on Aging and appropriate committees of the U.S. House of Representatives is one step in this advocacy.

Religious organizations should appoint people to be responsible for social concerns both in the individual congregation and at the organization level of presbyteries, dioceses, judicatories, conferences, etc. as well as at the national level. Religious bodies can strengthen their advocacy by including studies and discussions on the problems and needs of the aging in their religious education programs.

RECOMMENDATION XII

Religious bodies have traditionally and properly developed their own philosophies. We recommend that they work together with the elderly and coordinate their efforts with other groups to develop and declare an affirmation of rights for the elderly. These rights should include the basic values of all while insuring the basic right of freedom of religion.

A. Administration Response

1. " Consistent with the resources that may be available at any given period of time the Administration will work with State and local governments and the private sector in order to facilitate progress in areas which can contribute to the changes of attitude called for by the President:

- a) Focusing attention on the needs of older persons.
- b) Developing a better understanding of aging and the aged by preparing materials for the media and including appropriate materials in the curriculum at all levels of education.
- c) Endeavoring to obtain a wider acceptance of the belief that no age limits should be attached to the concept of the dignity and worth of each human being.

The religious community, both by its teachings and its deeds, is in a position to make significant contributions to the achievement of this objective. If this is done, an increasing number of persons will refuse to tolerate policies that put older persons in an inferior or secondary position. There will then be, in the President's words, a "new National attitude toward aging in this country -- one which fully recognizes what America must do for its older citizens and one which fully appreciates what our older citizens can do for America."

B. Response of Study Panel

A collaborative effort between government and the religious community to achieve a wide acceptance of the principle that no age limits should be attached to the concept of the dignity and worth of each human being might be one of the unique and most important initiatives to emanate from the White House Conference on Aging.

Means should be found immediately for representatives of religious bodies to work with the Federal government in exploring ways to achieve a fruitful and proper collaboration. The Study Panel urges the Administration on Aging to strengthen and widen the on-going relationship with the various religious bodies throughout the country. In turn the religious organizations should designate a person or persons within their governing bodies who would seek ways in which to achieve collaborative efforts between the government and religious bodies and would insure that this collaboration met with the full cooperation and assistance of all local congregations.

RECOMMENDATION XIII

It should be the national policy that religious bodies and other private agencies make it their concern to bring together the services of the entire community to provide opportunity for interfaith broad-based community programs for the aged through multipurpose community centers.

A. Administration Response

"The Administration believes that local governments should give full consideration to the use of available Federal funds, e.g., through the Older Americans Act, the Adult Services Titles of the Social Security Act, General Revenue Sharing and the proposed Better Communities Act -- to make Senior Centers and the Services provided through them available to a greater percentage of older persons."

B. Response of Study Panel

Religious congregations should consider objectively whether their facilities would be more fully used if they were used as the senior centers. Consideration should be given to the organization or church body supplying the facility so that they are adequately reimbursed for maintenance costs, janitorial services, heat, light and other costs resulting from the heavier usage of the building and grounds.

RECOMMENDATION XIV

Religious bodies and government should affirm the right to, and reverence for life and recognize the individual's right to die with dignity.

A. Administration Response

None

B. Response of Study Panel

There is a tremendous current of feeling and concern throughout this country regarding the extent to which people should be subjected to indignity and suffering in prolonging their lives through advanced medical techniques. This issue is of great significance and importance and it should be discussed widely and honestly by people of all ages in all vocations and in all parts of the country. Seminars, workshops, consultations and symposia should be arranged for physicians, lawyers, clergy, laity, sociologists and psychologists - both within their own groups and in mixed groups, by religious congregations, national and Federal governments. Religious organizations and schools at all levels can be particularly involved in encouraging candid discussion and understanding of the implications of this issue in their death education courses. When these dialogues are completed, the legislative bodies will need to take action consistent with the conclusions reached by the many groups involved and by older people themselves.

RECOMMENDATION XV

That a National Conference on spiritual well-being be held within the next two years and not later than five years to review and evaluate the recommendations in terms of achievements as a result of the 1971 White House Conference on Aging.

That private institutions of religious and charitable organizations, which discriminate in the admission of black persons and those of other minority groups, and deny and abrogate the civil rights of such persons have their tax exemption status lifted, and we urge that the U.S. Congress enact appropriate legislation to bring this about.

That church-related retirement facilities add to their staff (on a salaried and/or volunteer basis) a retiree in the role of community ombudsman-advocate, working with older adults within the institution and the larger community, serving as a representative with and for older adults.

Subscribing to the principle that responsibility for the care and affectional support of persons of all ages rest with one's immediate family and kinsmen, we therefore recommend that:

(a) Tax deductions be given for qualified gifts and assistance to aged persons, as are now authorized for charitable contributions.

(b) Education be inaugurated for couples in their middle years for their tasks in bridging the generations, including accepting death and preparation for the life of a survivor.

A. Administration Response

1. "As directed by the President, a Post Conference Board of the White House Conference on Aging has been created."

2. "At its first meeting, the Post Conference Board adopted a resolution to create a series of study panels paralleling the major topics discussed at the Conference."
3. "Tax relief is being provided to households taking care of dependent elderly persons who are incapable of taking care of themselves."
4. "The Administration will support the use of funds by the Administration on Aging to conduct, in coordination with the Office of Education, model projects for preretirement education."
5. "Consistent with the resources that may be available at any given period of time, the Administration will work with State and local governments and the private sector in order to facilitate progress in the following areas of activity -- areas which can contribute to the change in attitude called for by the President in his address to the delegates of the White House Conference on Aging."
6. "Developing a better understanding of aging and the aged by preparing materials for the media and including appropriate materials in the curriculum at all levels of education."
7. "Providing opportunities for interaction between the young and older adults."
8. "Involving an increasing number of volunteers from the private sector in providing services for older persons."
9. "Endeavoring to obtain a wider acceptance of the belief that no age limits should be attached to the concept of the dignity and worth of each human being."

B. Study Panel Response

The creation of the National Interfaith Coalition, whose express purpose is to help carry out the recommendations proposed by the Conference delegates, has and will go far towards achieving the initial objective of this recommendation. Its plans to continue its activities represent the basis for an on-going effort that will assure that the recommendations are given full consideration.

The Study Panel endorses the belief that discrimination for large, non-profit organizations, which denies individual civil liberties, should constitute the basis for denial of tax-exempt status. The Panel feels that action in this area has been lacking and urges greater efforts to this end by both Congress and Administration.

The Administration's plans to provide opportunities for greater involvement by volunteers from the private sector to assist the elderly are commendable, as are its plans for the creation of nursing home ombudsmen.

Tax incentives to help defray costs of maintaining older persons in one's home should help renew the spirit of responsibility for one's relatives that is so urgently needed today, but we feel that additional incentives are also required.

579

TRANSPORTATION

-363-

(364 blank)

TRANSPORTATION

PREAMBLE

Throughout the continuing consideration by the Study Panel on Transportation there has run the thread of perception that adequate provision for the elderly in this field is very closely intertwined with and interdependent on the fulfillment of transportation needs for the whole people, both urban and rural. Transportation is the life blood of our complex society. It is no less so for the elderly.

While the Panel addressed itself to the specific needs of the elderly, it endeavored to do so in terms that would produce the compatible fulfillment of the whole people. Thus, when we speak of development of transportation to places of employment, commerce, recreation, culture, religion, etc., we were aware that the whole community had the same needs; that capital expenditures and ongoing effort was so great that only total community involvement and benefit would adequately and permanently provide for the needs, not just for the elderly, but for all of the people.

We perceive that advocacy for reduced or no fares or for demand responsive systems, or for no fault insurance, or for publicly owned mass transit etc., while referred to in terms of the needs of the elderly is intended to be supportive of the need to be responsive to the problems of all of the people regardless of economic or cultural status or of race, creed or color.

In our effort to find solutions for the transportation needs of the elderly we sought to be mindful that the attainment of all the objectives contained in the Study Panel Report would require transcending many deeply ingrained interests, practices and attitudes. Not a small part of this latter consideration are the interests of workers affected by such changes. It is not the intention to alienate this solid spectrum of support needed to reach the objectives of the elderly, by seeking the solution herein proposed. Coordination of these expressed goals with the interest of workers affected is required for ultimate success.

To the degree we do achieve success in providing for -- not just survival -- but life with dignity and purpose for the Nation's elderly, we will also be contributing to life with dignity and purpose for all of the people; and to the survival, restoration, and improvement of community life in our complex society. That has been our hope and our goal and our purpose.

RECOMMENDATION I

The Federal Government shall immediately adopt a policy of increasing transportation services for the rural and urban elderly. The policy should be flexible, encompassing various alternatives. Both system subsidies and payments to the elderly individuals may be needed, the choice depending upon the availability and usability of public and private transportation.

Subsidies should be made available not only for existing systems, but also for the development of flexible and innovative systems, especially where there are no existing facilities.

Financial support should be directed toward accomplishing program purposes such as: (1) Reduced or no fare transit for elderly people (2) operating and capital subsidies.

A. Administration Response

1. "The Administration has given high priority to developing full access for the elderly to transportation in order to assure that older Americans can participate fully in community life and receive urgently needed services."
2. "The President, in keeping with his announcement at the White House Conference on Aging, has directed that all Federal grants which provide services for older persons also "ensure that the transportation needed to take advantage of these services is available."
3. "The Secretary of Health Education and Welfare has directed that guidelines be developed to assure that transportation is included in the State plans that would be required under the proposed amendments to Title III of the Older Americans Act."
4. "The Administration on Aging is working with the Department of Transportation to develop joint transportation demonstration projects."
5. "The Administration supports the use of Administration on Aging model project funds for the development of methods and programs; in coordination with the Department of Transportation, to determine the most effective ways of increasing the mobility for older persons."

6. "The President has proposed that funds now in the Highway Trust Fund be used by States and localities to expand resources in the mass transportation area..a step that could result in the provision of greater mobility for older persons."
7. "The President, in his Special Message on Aging, also stated that the Department of Transportation stood "ready to give priority attention to community requests for helping Older Americans through capital grants from the Urban Mass Transportation fund and is willing to commit significant resources to this end. I urge the States and localities to move immediately to take advantage of these resources."

B. Response of Study Panel

The Administration has given a high priority to developing full access to transportation facilities for the elderly, has directed that all Federal grants which provide services for older people assure the availability of transportation services, and supports the use of model project funds to determine the most effective way of increasing older persons' access to community life. We appreciate the steps being taken, but suggest that a flexible, multi-dimensional policy demands an integrated, coordinated pattern at the Federal level in order to ensure that counterproductivity and non-coordination is not encountered through the proliferation of competing transportation systems. In addition, in the absence of clear provision for adequate funding, we must cite the possible danger of disillusionment that will follow the offering of words without money.

The Administration is doing an increasingly better job to provide or recommend programs for additional capital subsidies.

However, we find no evidence that the Administration has effectively responded to the matter of providing operating subsidies for existing or innovative systems. In our view, the competition for funds under Revenue Sharing will make the availability of such funds for operating subsidies relatively scarce or totally absent.

We are delighted to see that the Administration on Aging and the Department of Transportation are cooperating in a transportation demonstration plan, and encourage that such a plan direct itself to the study of reduced fare for the elderly and to no-fare systems.

To directly implement the Section Recommendation, the Urban Mass Transportation Act should be amended to ensure that all transit facilities and services programs funded under the Act are required to offer reduced or no fare for the elderly.

RECOMMENDATION II

The Federal Government shall act immediately to increase support for the development of transportation for all users, with special consideration for the needs of the elderly, the handicapped, rural people, the poor, and youth.

A. Administration Response

1. See #2 and #6 under Recommendation I.

B. Response of Study Panel

The panel is pleased with the Administration's statement assigning high priority to developing full access to transportation for the elderly to ensure that they can participate fully in community life. Therefore the panel urges the Administration and the Congress to take positive steps to ensure the development of transportation for all users, with special consideration for the needs of the elderly, the handicapped, rural people, the poor, and youth.

RECOMMENDATION III

Publicly funded programs for the elderly shall be designed so that transportation will be required as an integral part of these programs, whether transportation is provided directly by the programs or through other community resources. Public policy shall require coordination of existing transportation and/or new planned transportation with publicly funded programs for the elderly.

A. Administration Response

1. See #2 under Recommendation I.
2. "The Administration on Aging, the Community Services Administration, and the Rehabilitation Services Administration operate programs for which existing or proposed legislation authorizes the provision of transportation in connection with other services available to older persons."

B. Response of Study Panel

We support the Administration in issuing a directive that all Federal programs which provide services to older people include the necessary transportation. We are pleased to learn that several agencies operate service programs for which existing or proposed legislation authorizes the provision of transportation.

In line with these steps, we recommend that where transportation is an integral part of a service program, persons knowledgeable in transportation should be involved in the planning, coordinating, and financing of the transportation component at the earliest opportunity.

We strongly urge that care be taken to ensure that the cost of such transportation does not come from funds designated for the primary service.

RECOMMENDATION IV

To assure maximum use of vehicles and coordination, all government passenger vehicles (such as school buses, vans, and other vehicles) in use by Federal, regional, State, county, and city programs shall be made available interchangeably among agencies for the provision of transportation to senior citizens for their respective programs. The use of these vehicles shall be available without prejudice to serve all disadvantaged elderly. An area clearinghouse should be established so that all local transportation resources are used efficiently to meet the transportation needs of the elderly.

A. Administration Response

1. "The Administration has initiated action to encourage the use of school buses to transport older persons so that they may take advantage of available community services."

"The Secretary of Transportation has held joint discussions with the Office of Management and Budget and the Department of Health, Education and Welfare to explore the problem of liability insurance. Proposed course of actions growing out of these discussions include: (1) encouraging the States to help obtain adequate insurance for school buses used to transport the elderly, where buses can be used effectively for this purpose, (2) utilization of HEW programs to assist paying for part or all of these insurance costs where appropriate, (3) development of cooperative HEW-DOT research and demonstration programs to ascertain the limitation of and opportunities provided the elderly by school bus utilization for transportation. Steps are now being taken to develop plans to implement one or more of these possible courses of action."

B. Response of Study Panel

The Administration Response seems reasonable in light of the practicality of the proposal, however, investigation of the use of other government-owned passenger vehicles should be pursued.

No action has been reported with regard to the establishment of local clearinghouses designed to ensure that transportation resources are efficiently used. The advantages of establishing such local clearinghouses are obvious; the implementation of such centers, however, must take place at State, regional, and local levels.

RECOMMENDATION V

The Federal Government shall provide leadership and financial support for the development of individualized, flexible transportation for the elderly which provides increased access to health care facilities, shopping, religious, social, recreational, and cultural activities. Programs should be implemented by local and State governments, private enterprise, and voluntary community action agencies.

A. Administration Response

No response.

B. Response of Study Panel

The Administration does not appear to have adequately dealt with the development of individualized, flexible transportation for the elderly. Recognizing the present state of knowledge of such a system of transportation, we suggest that examination of this matter under the Urban Mass Transportation Administration's Technical Studies program is feasible and warranted and should be expanded beyond the few current demonstration projects.

RECOMMENDATION VI

The Federal Government, in cooperation with State and local governments and other agencies, shall set minimum standards for the design of equipment and facilities and shall develop programs to assure the safety, comfort, and convenience of the elderly as pedestrians, drivers, and users of transportation services. Implementation and enforcement of these standards should be by local and State governments unless preempted by the Federal Government.

A. Administration Response

1. "The Urban Mass Transportation Administration within the Department of Transportation has issued new guidelines for applicants for capital grants which require that the transit plan submitted with applications include consideration of the service needs of the elderly."
2. "The Federal Highway Administration is encouraging States to include specific aids for the elderly and handicapped in all rest areas and tourist facilities."
3. "Airlines and operators of air terminals are cooperating with the Federal Aviation Administration to meet the unique problems of the aged in this area of public transportation."

B. Response of Study Panel

We are glad to see that guidelines are being developed and disseminated for reducing pedestrian accidents and that efforts are being directed at securing changes beneficial to the elderly in airline and air terminal procedures, and in rest areas and tourist facilities. We urge continued effort in developing, improving, and expanding programs and guidelines for all transportation situations, and continued dissemination of guideline materials as they are developed to assure the safety, comfort, and convenience of the elderly as pedestrians, drivers, and users of transportation services.

RECOMMENDATION VII

Transportation systems and services developed or subsidized by public funds shall be designed in architecturally barrier-free manner in order to provide accessibility for all people.

The Federal Government shall provide guidelines to State and local governments to assist in the development of improved ancillary services such as terminal design, shelters, centralized transit information, traffic control, and cross-walk markings. Where appropriate, symbols, multilingual signs, and other devices will be used to facilitate movement of all users.

A. Administration Response

1. "Airlines and operators of air terminals are cooperating with the FAA to meet the unique problems of the aged in this area of public transportation."

B. Response of Study Panel

The Administration makes no response to the Recommendation that transportation systems be designed in an architecturally-barrier free manner. To implement this Recommendation, we recommend that the Department of Transportation issue the guidelines necessary to comply with Public Law 90-480 (Architectural Barriers Act). This will bring the Department into line with other agencies with regard to the provision of architecturally barrier free environments.

It is encouraging to note that in cooperation with the Federal Aviation Administration, airlines and air terminal operators are working to meet the unique problems of the elderly traveller through such means as standardized directional signs and automated procedures. Similar programs, procedures, and signs, should be developed and provided in all other transportation modes.

RECOMMENDATION VIII

Appropriate legislation at all levels of government should provide that the elderly and handicapped be allowed to travel at half fares or less on a space-available basis on all modes of public transportation.

A. Administration Response

1. See #5 under Recommendation I.

B. Response of Study Panel

There is no Administration response or legislative action on this proposal to promote legislation to provide reduced fares for the elderly and handicapped on all modes of public transportation. With respect to urban mass transportation, we encourage that all transit facilities and service programs funded under provisions of the Urban Mass Transportation Act be required to offer a reduced or no fare system for the elderly. Reduced travel rates on a space-available basis on other modes of public transportation should also be provided. To implement this proposal, for example, necessary action should be taken in regard to rail travel by Amtrak and in regard to air travel by the Civil Aeronautics Board.

RECOMMENDATION IX

The Federal Government should move immediately to adopt a policy which will both increase the level of funding available to the development and improvement of transportation services and also foster the coordination of all forms of transportation, public and private, at Federal, State, regional, and local levels of responsibility.

A. Administration Response

1. See Administration Response to Recommendation I.

B. Response of Study Panel

To increase the level of funds available for the development and improvement of transportation services, the Administration, supported by the Senate, has proposed that Highway Trust Funds be made available to augment resources in the mass transportation area. We applaud the actions of the Administration and the Senate in this regard.

To guarantee further congressional action on this proposal, it is required that the House Public Works and House Ways and Means Committees be encouraged to support efforts to amend the Federal Aid to Highways Act and the Revenue Act of 1956 to permit the use of Highway Trust Fund monies for mass transportation purposes.

To foster the coordination of all modes of transportation, we recommend that the Congress enact legislation that would designate one agency (such as the Department of Transportation) to be responsible for coordinating all existing and proposed transportation provided by various Federal Departments and agencies. Each State should establish a comprehensive Department of Transportation which shall assist and coordinate efforts in the planning and coordination of transportation services at the local and regional levels.

RECOMMENDATION X

The Congress of the United States is urged to immediately adopt legislation to convert the Highway Trust Fund into a general transportation fund to be utilized for all modes of transportation.

A portion of the general transportation fund shall be made available for the development of new transportation services and the improvement of existing transportation services for the elderly.

A. Administration Response

1. See #6 under Recommendation I.

B. Response of Study Panel

To increase the level of funds available for the development and improvement of transportation services, the Administration, supported by the Senate, has proposed that Highway Trust Funds be made available to augment resources in the mass transportation area. Again, we applaud the actions of the Administration and the Senate in this regard.

As stated in our response to Recommendation IX, to guarantee further congressional action on this proposal, it is required that the House Public Works and House Ways and Means Committees be encouraged to support efforts to amend the Federal Aid to Highways Act and the Revenue Act of 1956 to permit the use of Highway Trust Fund monies for mass transportation purposes.

The Administration's proposal to use Highway Trust Fund monies to support mass transportation is acknowledged to provide State and local officials with the flexibility of using these funds to develop new or improve existing transportation services serving the elderly.

To make additional funds available for improving transportation services for the elderly, we encourage appropriate State legislation to permit use of State Highway Trust Funds for mass transportation on an optional basis at the local level.

RECOMMENDATION XI

A nationwide set of driver's licensing standards shall be established that do not discriminate against the elderly on the basis of chronological age alone.

A. Administration Response

1. "The Administration concurs with the delegates to the White House Conference on Aging that all levels of government must review their laws and policies to prevent application of licensing and insurance procedures in such a manner as to jeopardize the mobility of the elderly."
2. "The President has further encouraged the National Highway Traffic Safety Administration to establish drivers license standards which States must adopt to be eligible for Federal funding under the Highway Safety Act of 1966."

B. Response of Study Panel

In regard to this Recommendation, the Administration has expressed concurrence with the expressed goal and offered encouragement directed at its realization. Neither one of these steps represents definitive action. The White House Conference on Aging was not aimed at gaining concurrence, it was aimed at action. To implement the Recommendation as proposed, the President should direct rather than encourage the National Highway Traffic Safety Administrator to establish drivers license standards which do not discriminate on the basis of age.

RECOMMENDATION XII

In designing new, flexible transportation services, the Federal Government should establish a national policy for guaranteed liability insurance to cover volunteer drivers.

A. Administration Response

1. See Administration Response to Recommendation IV.

B. Response of Study Panel

We are pleased to see that the Departments of Transportation and Health, Education, and Welfare, and the Office of Management and Budget have undertaken discussions exploring the problems of liability insurance as related to the use of school buses. We suggest that the scope of such discussions be broadened to include the problems of liability insurance for volunteer drivers of all types of vehicles in programs for the elderly.

RECOMMENDATION XIII

Individuals should be encouraged to serve as volunteer drivers for the elderly and be compensated in one or more of the following ways: reimbursement for out-of-pocket cost of services rendered; a tax break; use of publicly owned vehicles; or assistance with insurance and maintenance of vehicles.

A. Administration Response

1. "The use of volunteers in Drive-to-Serve projects is being encouraged by the Department of Agriculture in its food assistance out-reach efforts."

"Through the Expanded Food and Nutrition Program conducted by youths in the cooperative extension programs, package-carrying services for the elderly and handicapped are provided in some urban areas. In some other urban areas, 4-H youth are serving as personal shoppers for the elderly who have food stamps. Providing transportation for the elderly is a volunteer service that many Extension Homemakers Club members provide."

B. Response of Study Panel

The Study Panel appreciates the fact that the U.S.D.A. has encouraged Drive-to-Serve Projects. But more positive inducements and incentives must be provided if the present programs are to continue and new programs are to be fostered.

As in the response to Recommendation XII, it is recommended that the discussions now underway between the Departments of Transportation and Health, Education, and Welfare and the Office of Management and Budget regarding the problem of liability insurance and the use of school buses, be expanded to include consideration of liability coverage for volunteer drivers of all types of vehicles. Additional study should be undertaken to include consideration of the effects of compensation by reimbursement for out-of-pocket expenses, a tax break, the use of publicly owned vehicles, and/or assistance with insurance and maintenance of vehicles, as they relate to the volunteer driver, for the purpose of determining the feasibility of such incentives.

Furthermore, we recommend that the Departments of Transportation and Health, Education, and Welfare and the Office of Management and Budget, in the context of these discussions, review and comment upon the need and possibility of revising local and State public utilities laws for the accomplishment of the above goals.

RECOMMENDATION XIV

An elderly person knowledgeable in the affairs of the elderly shall be appointed as an assistant reporting directly to the Secretary of Transportation to represent the needs of the elderly and work toward implementation of their transportation programs.

A. Administration Response

1. "As a result of action suggested by the Domestic Council Committee on Aging, the President will send a memorandum to each Department or Agency with responsibility for programs in the field of aging calling for the designation of a person to coordinate programs for older persons across departmental lines. This individual will report directly to the Secretary or agency head on these matters."

B. Response of Study Panel

Coordination responsibilities do not ultimately connote permanence, initiative, and continuity. We, therefore, suggest that the Administration's response is inadequate and recommend that the post of an assistant reporting directly to the Secretary of Transportation, responsible for representing the needs of the elderly and working toward implementation of their transportation programs, shall be established.

To carry out the intent of the Conference recommendation, we recognize that legislation is necessary to provide for the establishment of this post.

RECOMMENDATION XV

The Federal Government and/or State governments should pass legislation prohibiting insurance companies from increasing auto insurance premiums or cancelling policies on the basis of age alone.

A. Administration Response

1. See #1 under Recommendation XI.

B. Response of Study Panel

The Administration's response to this recommendation is thought to be inadequate. The White House Conference on Aging was not aimed at gaining concurrence; it was aimed at action. Direct Federal action is necessary, in addition to State action, to eliminate the inequities and discriminatory practices faced by older people in regard to auto insurance premiums and policy cancellation on the basis of age alone. Therefore, the Administration and the Congress must establish minimal Federal guidelines which the States shall be required to adopt in the implementation of their State insurance programs dealing with these matters.

RECOMMENDATION XVI

Exploration of the concept of no-fault insurance and the possibility of government-operated insurance programs, and experimentation now underway in the various States, which would further the development of better insurance programs, and experimentation now underway in the various States, which would further the development of better insurance programs, shall be encouraged.

A. Administration-Response

1. "The Administration has endorsed no-fault insurance and has urged State--rather than Federal--action."

B. Response of Study Panel

On the basis of studies and experiments which have been accomplished, the Administration has endorsed no-fault insurance. It is now necessary for the Federal Government to insist upon no-fault insurance throughout the Nation in order to avoid inequitable and discriminatory consequences. Toward this end, immediate action is necessary on both the administrative and legislative levels.

RECOMMENDATION XVII

All levels of government shall take immediate steps to correct the present lack of provisions for the basic transportation needs of the rural elderly. Federal laws shall be amended to include specific definitions of responsibility for rural transportation by the Department of Transportation.

A. Administration Response

1. No response.

B. Response of Study Panel

We commend the Office of Economic Opportunity demonstration programs in rural areas of nine States; however, we recognize that there has been no response by the Department of Transportation, the centrally appropriate administrative office. At the present, there is no program within the Department of Transportation through which public transportation can be provided the rural elderly. Thus, we recommend that the Department of Transportation establish a rural transportation program and that adequate funds be provided.

RECOMMENDATION XVIII

In the absence of State or local response to the transportation needs of all users, especially the elderly, handicapped, rural, poor, and youth, the Federal Government shall be empowered to act unilaterally in their interest.

A. Administration Response

No response.

B. Response of Study Panel

Transportation is necessary to allow senior citizens to secure the basic necessities of life. Only 45 percent of the elderly hold valid drivers licenses and an even smaller percentage can meet their needs by the use of the automobile. In light of this, we are discouraged to see no Administration response and express our belief that the Federal Government should take the initiative to provide public transportation wherever State or local initiatives are inadequate or nonexistent.

RECOMMENDATION XIX

Individualized and/or public transportation shall be incorporated in the planning of all privately funded senior housing projects to meet the needs of the elderly.

A. Administration Response

No response.

B. Response of Study Panel

The requirement that individualized and/or public transportation be incorporated in the planning of privately-funded senior housing projects is acknowledged to fall beyond the scope of the Federal Government. Rightfully, responsibility for this rests within the jurisdiction of local zoning authorities. It is necessary, therefore, that zoning regulations and ordinances be modified so as to require developers of privately-funded senior housing projects to respond adequately to all of the transportation needs of the residents of such housing.

RECOMMENDATION XX

All policies adopted as a result of the recommendations of this Conference shall be applicable to all of the United States, the Commonwealth of Puerto Rico, and all other territories associated with the United States.

A. Administration Response

1. ".....recommendations made by the delegates designed to deal with special circumstances unique to a particular minority group will be the subject of special studies by the appropriate Departments or agencies."

B. Response of Study Panel

The Administration has endorsed the concept that programs designed to assist the elderly be available to all older Americans. This endorsement is an insufficient response. The White House Conference on Aging was not aimed at obtaining endorsements, but at initiating action. Immediate action is necessary at both administrative and legislative levels to ensure that equal availability of public benefits is provided throughout the United States, Puerto Rico, and all U.S. Territories.

RECOMMENDATION XXI

Because American Indian Reservations are considered to be outside of State jurisdiction, American Reservation Indians are not eligible for existing or proposed State-funded transportation services. The Federal Government should recognize the unique transportation problems of American Reservation Indians, and shall immediately provide through subsidies new transportation services that assure American Reservation Indians transportation to health care, educational, social, religious, recreational, cultural, and shopping facilities.

A. Administration Response

1. See #2 under Recommendation I.
2. See #1 under Recommendation XX.

B. Response of Study Panel

There appears to be no direct indication that transportation programs are readily and adequately available to Indian Reservations. It is imperative that administrative and legislative action be taken immediately to provide subsidies for new transportation services which will guarantee Reservation Indians access to needed facilities, programs, and services.

RECOMMENDATION XXII

It is proposed that the 1971 White House Conference on Aging and subsequent follow-up of this Conference can benefit by including in their structured deliberations a special section or workshop having a kind of free-wheeling assignment to offer new and creative ideas. Such a section would not be bound by structured issues. It would be composed of leaders from the elderly and a cross-section of all the major fields of society. It would examine the issues and underlying value-systems which limit self-determination and inhibit the elderly person's opportunity to be productive. This section would suggest new basic concepts not now explored in the field of aging. Said concepts would go beyond our basic view of the elderly person's role in society.

A. Administration Response

1. "As directed by the President, a Post Conference Board of the White House Conference on Aging has been created."

E. Response of Study Panel

We commend the Administration and the Congress for allowing for the immediate follow-up of the White House Conference on Aging: for establishing the Post Conference Board and creating Study Panels to review immediate actions taken in response to the Conference and to propose strategies for additional action.

The 1973 Amendments to the Older Americans Act, enacted by the recent Congress, will implement or authorize a substantial portion of the recommendations of the White House Conference. The Older Americans Act has a built-in capability for providing

an organized, long-range followup to the White House Conference and the Study Panel urges the legislation be signed into law to implement the important programs included in the Amendments.

The Federal Council on the Aging which is provided for under the Amendments should remain an open forum for the introduction and development of new and creative ideas responsive to the needs of the elderly.

The action and interest already displayed on the part of the Administration and the Congress suggest that the problems of our Nation's older people are to be given continuing attention at the highest levels of government. However, we deplore the retardation of progress toward these important goals due to the reduction in funding of the 1973 amendments awaiting Presidential approval.

AGING AND REHABILITATION

Aging and Rehabilitation

PREAMBLE

The Study Panel on Aging and Rehabilitation was charged with reviewing the actions taken to implement the recommendations of the White House Conference on Aging dealing with the special needs of older persons who are blind, deaf, or disabled.

This Panel started out with the conviction that special programs are needed for individuals with special needs, particularly the elderly who are visually impaired, deaf and those with other disabilities. The findings of the three sessions concerned with special problems on older people clearly indicate that without defined programs, these groups of aging individuals would not receive services so essential to their dignity, well-being, security and health. These individuals will be forgotten and ignored in the so-called comprehensive approach.

The Panel believes it is unrealistic to argue that if more income is made available to older people, particularly older people with disabilities, the services to meet those needs will be created. The Panel is certain that in the foreseeable future, there is little likelihood that the income of the majority of older people will reach the point where they will have the financial independence to procure essential and often costly services. Moreover, the Panel doubts whether these services will come into being until the Government is prepared to operate or subsidize them.

The Panel was deeply concerned over the veto of the Rehabilitation Act of 1973. The Panel does not agree with the elimination of Title X, as a result of the veto, and believes that Congress should re-introduce the legislation since it contained special provisions for services to individuals who are both deaf and blind and to older individuals.

The Panel also urges that the Older Americans Act of 1972 with its provisions for community service employment of the elderly, and retraining and employment for the older workers, and the elevation of the Administration of Aging to the Office of the Secretary be reintroduced and enacted.

The Panel holds that it is essential that there be at a high level in the Federal Government an agency committed to serving as an advocate for the elderly. Such an agency should also include in its mission, advocacy of the special needs of those who are visually impaired, deaf, or otherwise disabled.

ADMINISTRATION RESPONSE*

1. "The Administration believes that programs in the field of aging must take into account the special circumstances that are unique to each minority group and the handicapped."
2. "The Administration will encourage local communities to include in their plans for coordinated services for older persons programs designed: (1) to assist in the rehabilitation of the elderly handicapped; (2) to help the elderly handicapped remain in their own homes or other places of residence; and, (3) to provide the elderly handicapped with opportunities for continued involvement in life through full-time or part-time employment or through volunteer activities.

Federal, State and local funds that can be used to develop "service packages" for older persons at the community level-- such as funds under the Older Americans Act, the Adult Services titles of the Social Security Act, and General Revenue Sharing-- can be used to meet the unique needs of handicapped older persons."

3. "The Rehabilitation Services Administration has funded projects designed to rehabilitate elderly disabled poor and to place them in remunerative employment.

It is hoped that these research and demonstration projects will demonstrate methods and techniques which can be utilized by State rehabilitation agencies in order to strengthen and expand their programs for the rehabilitation of older handicapped persons.

4. "The Rehabilitation Services Administration is making it possible for persons in private and public agencies working with the handicapped to participate in short-term training courses -- courses which are focusing on the implementation of recommendations made by the delegates to the White House Conference."
5. "The Department of Health, Education and Welfare, consumer organizations, and related professional associations have initiated a program designed to focus appropriate resources on dealing with the health, education and welfare problems associated with deafness -- including the problems of aged deaf persons.

This project is spearheaded by the Rehabilitation Services Administration of the Social and Rehabilitation Service and is being carried on in cooperation with Gallaudet College, 37 bureaus of the Department of Health, Education and Welfare, and consumer and professional organizations."

* The Administration Response presented in response to these Special Concerns Sessions recommendations is a generic response that is applicable to all the recommendations cited. Appropriate cross references to previously cited materials have been provided relative to specific recommendation items.

6. "The Rehabilitation Services Administration is funding demonstration projects to staff special rehabilitation adjustment centers for the geriatric blind."
7. "The Veterans Administration is engaged in a wide variety of programs to assist aging patients who are blind or have a severe visual impairment."

AGING AND BLINDNESS REPORTRECOMMENDATION I

It is recommended that Congress increase old age, survivors and disability insurance and the adult public assistance categories to the intermediate level of living recommended by the Bureau of Labor Statistics (at least \$2,297 for a single person and \$4,185 for a married couple) and further that the adult categories of public assistance be federalized and that Social Security benefits not be deducted from public assistance payments.

A. Administration Response

See Administration Response of the Section on Income.

B. Study Panel Response

The Congress indicated a 20% increase in OASDI benefits as an amendment to the legislation increasing the public debt ceiling. In addition, P.L. 92-603, the Social Security Amendments of 1972, improved widows' benefits so that cash survivors' benefits payable to widows at age 65 will equal the dollar amount their husbands would have been entitled to receive.

P.L. 92-603 also made substantial improvements in the three adult public assistance categories--old-age assistance, aid to the blind, and aid to the permanently and totally disabled. First, the law federalized these three categories and established Federal payments of \$130 a month for an eligible individual and \$195 a month for an eligible couple. States may supplement these payments if they choose to do so. Under the new program, \$120 a month income from any source including Social Security payments are to be disregarded. In the meantime, \$8 a month stemming from Social Security increases are to be disregarded in determining an individual's eligibility for public assistance under the existing Federal-State welfare program.

The passage of P.L. 92-603 substantially meets the stipulations of this recommendation. It is hoped that the President will continue to seek ways to increase the income for people in these categories.

RECOMMENDATION II

It is recommended that the National Eye Institute and other interested organizations on a national and local level combine their efforts in an urgent overall program to prevent or alleviate diabetic retinopathy; establish a center for the study of diseases of the macula, and increase research efforts in the fields of cataract, glaucoma, and vascular diseases of the eye; establish screening efforts especially at hospitals, medical centers, homes for the aged, nursing homes, and extended care facilities to find aged patients who have blinding eye diseases which can be helped by medical or surgical means and low vision aids. Such efforts should be made by interested philanthropic organizations and implemented if necessary by legislative action;

--It is further recommended that the National Eye Institute be required to develop better statistics on incidence, prevalence, and etiology of blinding eye conditions; that Congress amend Titles XVIII and XIX of the Social Security Act to cover low vision aids when the need is certified by an ophthalmologist or an optometrist specializing in low vision treatment and that the number of low vision centers be increased and that the centers be staffed under the supervision of an ophthalmologist or a qualified optometrist.

A. Administration Response

See Administration Response to the Section on Research, Training, and Physical and Mental Health.

B. Study Panel Response

The only aspect of these recommendations, other than the on-going research effort of the National Eye Institute, is the provision under Title XVIII (Medicare) for prosthetic lenses prescribed by an ophthalmologist or an optometrist. A strong effort by several national organizations to urge the National Eye Institute to continue the model reporting area on blindness statistics was of no avail.

The National Task Force of the American Foundation for the Blind, the Liaison Committee of the American Foundation for the Blind and the American Geriatric Society as well as the American Association of Ophthalmology have actively stated their support to the first three parts of this recommendation and are seeking ways to see that these proposals are implemented.

RECOMMENDATION III

It is recommended that the Vocational Rehabilitation Act be broadened to make rehabilitation services available to blind persons without regard to age or economic need and that Congress be urged to enact legislation to amend the Vocational Rehabilitation Act to provide rehabilitation services for older blind persons, and to amend the Randolph-Sheppard Act to accomplish these purposes.

A. Administration Response

See Administration Response to the Section on Research and Training.

B. Study Panel Response

The Congress enacted the provisions of S.1030 with minor changes as Section 310 of H.R. 8395, the Rehabilitation Act of 1972. (Sec. 310 would authorize project grants for provision of rehabilitation services for blind persons 55 years of age and older.) The President vetoed H.R. 8395. It is urged that this legislation be reenacted.

Amendments to the Randolph-Sheppard Vending Stand Act for the Blind were included by the Senate in its version of H.R. 8395 but were eliminated in conference owing to pressure of Government workers' unions.

The Randolph Shepherd Act should be strengthened and could be used as an employment opportunity for qualified middle-aged and older blind persons.

S.7, the Rehabilitation Act of 1972, a compromise version of H.R. 8395 with substantial reductions in authorizations of appropriations, designed to meet the President's objections, was passed by the 93rd Congress and again vetoed by the President. Adequate rehabilitation services for older blind persons cannot be provided by way of state and local effort alone and will require Federal financial assistance if neglect of the larger single group in the blind population is not to continue.

RECOMMENDATION IV

It is recommended that the elderly, including the blind and handicapped, must have access to all modes of mobility and transportation for obtaining the essentials of daily living, and the cultural and social benefits of modern society.

A. Administration Response

See Administration Response to the Section on Research and Transportation.

B. Study Panel Response

H.R. 8395 contained provisions for an Architectural and Transportation Compliance Board. Section 308 of the Older Americans Comprehensive Services Amendments of 1972 (H.R. 15657) authorized grants for special services for handicapped older Americans including transportation assistance. This bill was also vetoed by the President. It is urged that both these provisions be retained and that the legislation be re-enacted.

In order for the visually impaired older person to have access to all modes of mobility, the following kinds of considerations should be given.

1. Training in orientation and mobility including proper use of volunteer escorts.
2. Skilled training in personal management.
3. Other personal adjustment services as indicated, such as communication skills, recreational therapy, introduction to and use of special aids and appliances.
4. Financial security so that public transportation may be used.

These very same elements should be made available to other aging people who may have disabilities and those without impairments could certainly take advantage of programs in skill areas which would assist them to function independently.

RECOMMENDATION V

It is recommended that the Administration and Congress develop a network of personal care benefits for individuals with a certain level of functional disability to enable the older person to purchase whatever services are necessary to help him remain in his own home if he so wishes; such benefit is to be in addition to basic minimum income and assure a financial basis for local community service providers.

A. Administration Response

See Administration Response to the Sections on Facilities, Programs and Services.

B. Study Panel Response

Section 308 of H.R. 15457 would have made a start in developing special services to older handicapped Americans. However, no effort has been made outside of Veterans Administration programs for a special allowance for regular aid and attendance. It is hoped that this provision will be retained and the legislation will be passed quickly in the next session.

PHYSICAL and VOCATIONAL
REHABILITATION of OLDER PEOPLE

RECOMMENDATION I

A. Current legislation should be amended or administered so as to provide for:

- (1) Positive enforcement of existing anti-discrimination legislation.
 - (2) Improved Social Security benefits.
 - (3) Modification of the Social Security earnings limitation.
 - (4) Inclusion of rehabilitation incentives in welfare legislation.
 - (5) A rise in the level of Social Security Trust Funds available for payment for vocational rehabilitation services.
 - (6) Earmarking of specific anti-poverty funds for the aging.
 - (7) Inclusion of vocational rehabilitation services under Medicare and Medicaid and proposed comprehensive care programs.
- B. New legislation is needed to achieve:
- (1) Public agency financial support for long-term workshop employment programs.
 - (2) The use of Federal funds to create new jobs for the aging in private industry and government-sponsored public service activities.
 - (3) Non-discrimination in employment throughout the United States at all geographic levels.

A. Administration Response

See Administration Response to the Sections on Income, Employment and Retirement and Mental Health.

B. Study Panel Response

Note: In reviewing the recommendations made by the Special Concerns Session on Physical and Vocational Rehabilitation of Older People the Study Panel looked not only at the actions taken by the Federal Government which would implement the recommendations but also at the activities and actions taken by the private sector and State and local governments.

The passage of HR-1 (P.L. 92-603) fully implemented the recommendations (2) and (3) that Social Security benefits be improved and that the Social Security earnings limitation be modified. Action has been taken responsive to recommendation (5) in that the level of Social Security Trust Funds has been increased.

For recommendations (1) and (4) regarding positive enforcement of existing anti-discrimination legislation and inclusion of rehabilitation incentives in welfare legislation no evidence was found of positive action. No progress was noted in the enforcement of existing anti-discrimination legislation and no new legislation was introduced. The Social Security Amendments of 1972 (Public Law 92-603, Section 1615-A) has resulted in the denial of vocational rehabilitation assistance to the aged by moving the option for referral to state vocational rehabilitation facilities in the adult categories of the aged and in limiting mandatory referral for vocational rehabilitation through age 64 in the adult categories of the disabled and blind.

No progress was noted for recommendation (6) on earmarking anti-poverty funds. It was observed that no real progress had been made towards implementing recommendation (7) as no specific proposals were under consideration.

No progress was noted for the implementation of any of Part B recommendations on employment.

RECOMMENDATION II

The community should:

- (1) Pay particular attention to disadvantaged subgroups among the aging.
- (2) Establish general and/or specialized programs for the aging.
- (3) Be educated to the vocational rehabilitation potential of the aging.
- (4) Develop comprehensive service programs for the aging containing strong vocational components.
- (5) Develop organized groups of aging persons, that, among other activities, support vocational components.
- (6) Through its rehabilitation agencies and workers, function as an advocate of the aging.
- (7) Develop improved community transportation facilities in cooperation with United States Department of Transportation.

A. Administration Response

See Administration Response to the Sections on Education, Planning, Transportation, and Retirement Roles and Activities.

B. Study Panel Response

No progress was noted for recommendation (1) that particular attention should be paid to disadvantaged subgroups among the aging, or for (4) that comprehensive service programs be developed for the aging which would contain strong vocational components.

With regard to recommendation (2) on establishing general and/or specialized programs for the aging the panel noted that in cooperation with the Rehabilitation Services Administration of the Social and Rehabilitation Service, DHEW, three special community programs for the job placement of the disabled aged have been established. Also in cooperation with RSA one community has set up a special skills training center for a small

number of disabled aged. Since the White House Conference on Aging at least one state unit on aging has funded a special job program for the elderly.

Recommendation (3) suggested that the public be educated to the vocational rehabilitation potential of the aging. In cooperation with the Rehabilitation Services Administration a small grant to a community agency was made to conduct two follow-up conferences on the White House Conference on Aging which were aimed at educating the public and voluntary agencies to the vocational rehabilitation potentials of the elderly.

For recommendations (5), (6) and (7) there was only minimal progress noted. The panel stated that there is a great need for continued advocacy for recommendation (5) that organized groups of aging persons be developed who would support vocational components as well as other activities. Again with recommendation (6) that suggests that rehabilitation agencies and workers function as advocates for the aging the panel stated that there is a need for organized efforts.

The panel did recognize that there have been some signs of increased transportation services responsive to the idea in recommendation (7) that community transportation facilities be improved.

RECOMMENDATION III

Organizations and Programs.

A. All types of agencies in the community should:

(1) Open their general community facilities and programs to the aging on the same priority basis as other groups.

(2) Reach out to currently "underserved" subgroups of aging persons.

(3) Consider rehabilitation of the aging as a specialized rehabilitation sub-field.

(4) Include vocational rehabilitation services in their multifunction programs for the aging.

(5) Adopt service procedures that enable the aging to enter vocational rehabilitation programs without delay.

(6) Make provision for the aging to serve on boards and committees which formulate agency policies and programs.

(7) Encourage institutions for the aging to set up vocational programs for their residents.

(8) Establish experimental rehabilitation residences for the aging

(9) Develop regional and State vocational rehabilitation centers for the aging.

(10) Set up special programs for homebound and neighborhood-bound older agencies.

(11) Establish linkages between agencies for the aging and other agencies.

(12) Designate a national group to serve as a forum and a clearing-house for those concerned with the vocational rehabilitation of older persons.

(13) Expect rehabilitation agencies serving the aging to conform to commonly-accepted service standards.

B. Federal and State Rehabilitation Agencies should:

(1) Take leadership in developing services for older disabled persons, preferably through specially-designated organizational sections or divisions.

(2) Earmark special funds for the aging.

(3) Be strengthened, in general, in funding, programming, and administration.

(4) Assign responsibility for programs for the older disabled person to special personnel.

(5) Stipulate clearly that age, per se, is not a disqualification for entry into vocational rehabilitation service.

C. Voluntary Agencies should:

(1) Be given a major role in the vocational rehabilitation of older disabled persons.

(2) Engage, along with other agencies, in innovation research and demonstration activities.

(3) Attempt to reach as many older disabled persons as possible thru decentralized catchment area programs.

(4) Along with State agencies, assume responsibility for the conduct of long-term workshop employment programs with the aid of public agency funding.

(5) Offer comprehensive vocational rehabilitation programs. Be given responsibility for continuity of care.

D. Private enterprise should:

(1) Be encouraged to participate in the vocational rehabilitation of older disabled persons.

(2) Assume responsibility for preventing and ameliorating vocational handicaps in their aging employees.

(3) Be assisted in these functions by consultation from specialized rehabilitation agencies and personnel.

A. Administration Response

See Administration Response to the Sections on Facilities, Programs and Services, Transportation, Planning and Government--Non-Government.

B. Study Panel Response

A. Organizations and Programs

With regard to recommendation (4) that community agencies should include vocational rehabilitation services in their multifunction programs for the aging the panel noted that limited progress was evident at institutional levels in that some 12 to 15 hospitals have begun to be involved with rehabilitation services for the aged. The programs of these hospitals was also seen as a hopeful trend in response to recommendation (7) which stated that institutions for the aging should be encouraged to set up vocational programs for their residents.

Very limited progress could be noted in response to recommendations (10) and (11) that special programs for homebound and neighborhood bound be set up and that linkages between agencies for the aging and other agencies be established.

Again little progress was observed for recommendation (1) that community facilities be opened to the aging on the same priority basis as other groups, or for recommendation (2) that community agencies should reach out to currently "underserved" subgroups of aging persons.

The study panel found no visible progress for recommendation (3) that rehabilitation of the aging be considered as a specialized rehabilitation sub-field. The study panel felt it would require continued advocacy to achieve the implementation of this recommendation.

The study panel felt that some assistance from public sources would be required before recommendation (12) could be implemented where a national group would serve as a clearinghouse for those concerned with the vocational rehabilitation of older persons.

Recommendation (8) that experimental rehabilitation residences for the aging be established has not been tried with strictly rehabilitation oriented residences.

The study panel could find no progress for recommendations (5), (6) and (9).

B. Federal and State Rehabilitation Agencies

In response to part B, the study panel could not identify any actions taken by the Federal and State Rehabilitation Agencies on the first four recommendations. With reference to recommendation (5) that stipulation be made that age, per se, is not a disqualification for entry into vocational rehabilitation service the panel felt a backward step had been taken in Section 1615-A in the Social Security Amendments of 1972 which has resulted in the denial of vocational rehabilitation assistance to the aged by moving the option for referral to state vocational rehabilitation facilities in the adult categories of the aged and in limiting mandatory referral for vocational rehabilitation through age 64 in the adult categories of the disabled and blind.

C. Voluntary Agencies

The study panel reported that limited progress had been made in implementing part C recommendation that attempts should be made to reach as many older disabled persons as possible through decentralized catchment area programs through state planning. On the other four recommendations the study panel felt that only limited progress had been made.

D. Private Enterprise

No progress was evidenced in implementing any of part D recommendations.

RECOMMENDATION IV

Employment.

Vocational rehabilitation should emphasize careers, not merely jobs, for older disabled persons.

(1) Public and private hiring practices which bar older disabled persons from employment should be altered.

(2) Employers should be educated to see the values of hiring older disabled workers.

(3) Vocational benefits offered to other disability groups in employment should be opened to the aging.

(4) Flexible working hours should be adopted in industry. Additional part-time employment opportunities should be created.

(5) Employment should not be discontinued on the basis of an arbitrary maximum age.

(6) Employment opportunities in community service should be fully explored.

(7) Demonstration new careers programs should be launched.

A. Administration Response

See Administration Response to the Section on Employment and Retirement.

B. Study Panel Response

The study panel felt that no change and no progress had been made in any of the seven recommendations under employment.

RECOMMENDATION V

Personnel Training and Research.

- (1) Rehabilitation personnel should be trained in service to the aging through specially-funded programs.*
- (2) Grant applications for research and demonstration projects for the older disabled person should be given a high priority.*
- (3) National research and demonstration and/or research and training centers on the vocational rehabilitation of the aging should be established.*
- (4) Fundamental and applied research relating to the older disabled worker should be supported by public funding.*
- (5) Application of modern technology to the problems of the aging should be explored.*

A. Administration Response

See Administration Response to the Section on Training and Research.

B. Study Panel Response

The study panel reported that no progress had been made in any of the recommendations for personnel training and research.

RECOMMENDATION VI

Medical.

(1) Medicare-funded rehabilitation services should be extended to persons receiving Social Security Disability benefits through rehabilitation as well as other health facilities.

(2) Federal funds for medical research should be increased.

(3) Additional Federal financial assistance should be provided for the training of medical and allied personnel.

(4) The Federal Government should sharply increase the funds allocated for the construction, expansion, and alteration of rehabilitation facilities under the Hill-Burton Program and the Vocational Rehabilitation Act.

(5) Medicare and Medicaid legislation should be adopted which strengthens the rehabilitation component and which enables patients to receive medical rehabilitation service in conjunction with their hospitalization.

A. Administration Response

See Administration Response to the Section on Physical and Mental Health.

B. Study Panel Response

The Study Panel found that no progress had been made on implementing any of the five recommendations under Medical.

AGING AND DEAFNESS

Study Panel Response

Note: The Study Panel did not respond recommendation by recommendation since much of what they would have said would duplicate responses made by other study panels.

Historically, deaf people of all ages have found that, unless funds are earmarked for them, they do not receive an equitable share of social services. Elderly deaf people are even more apt to be overlooked because their communication problems limit their participation even within groups representing elderly people. Categorical aid for hearing handicapped elderly persons, therefore, is essential to their obtaining needed services.

To assure their interaction in meetings, deaf people require interpreters. Since elderly deaf persons are seldom economically able to afford the fees for interpreting services, they are frequently denied participation in decisions directly affecting their welfare. The cost of interpreting services should be built into budgets for all programs which encourage consumer involvement.

While most of the recommendations contained in the report on Aging and Deafness concern those people who suffered an early, total loss of hearing, the recommendations do not completely overlook the late-deafened and hard of hearing persons. Their adaptation to hearing impairment could be greatly facilitated by those deaf people who have learned throughout their lives to cope with a soundless world. Organizations of elderly persons and government bodies should recognize and make use of the abilities of the long-time-deaf person to assist his more recently deaf peers. In considering such programs, responsible authorities should bear in mind the very high prevalence of hearing impairments among elderly persons.

APPENDIX 1
STUDY PANEL ROSTER

APPENDIX 1

ROSTER OF STUDY PANEL MEMBERS

EDUCATION AND RETIREMENT ROLES

Chairman: Woodrow W. Hunter

Marietta Bengé	John W. McConnell
Lawrence O. Carlson	Laura Bell McCoy
Walter G. Davis	Walter C. McKain
Domingo Delgado	George E. Bennett
Thomas F. Fielder	Hazel G. Robinson
Julian P. Fox	Frances E. Hildebrand
Joselyn Geaza	Sebastian Tine

EMPLOYMENT, INCOME, AND POVERTY

Chairman: Carter C. Osterbind

Eveline M. Burns	Roger F. Murray
James Carbray	Jack Ossofsky
Danny Frank	Pablo Sedillo, Jr.
A. Webb Hale	Bert Seidman
Helen Hayner	Charles U. Smith
Dorothy F. McCamman	Michio Suzuki
Peter McDonald	Blue Carstenson

PHYSICAL AND MENTAL HEALTH CARE

Chairman: Jean Harris

Margaret Bartosek	A. Luther Molberg
Charles J. Fahey	Frell M. Owl
Thomas F. Frist	Annie May Pemberton
James G. Haughton	Sebastian Rodriguez
Elizabeth K. Lincoln	Lawrence T. Smedley
Edward J. Lorenze	Jack Weinberg
	Harry Weirnerman

APPENDIX 1: (Cont'd)

HOUSING AND TRANSPORTATION

Chairman: Garson Meyer

David L. Alvarado
 Walter J. Bierwagen
 Frances M. Carp
 Thomas Hsieh, A.I.A.
 Abraham J. Isserman

Clifford E. Miller
 Thomas C. Morrill
 Noverre Musson, F.A.I.A.
 Mrs. Mae Phillips
 David C. Singler
 George W. Schluderberg

SERVICES FOR THE ELDERLY

Chairman: Inabel Lindsay

Erma Angevine
 Robert D. Blue
 Kathleen Broderick
 Alice M. Brophy
 George W. Drysdale
 Henry V. Trujillo
 Ailee Henry
 Eunice P. Howe

Fannie P. Jeffrey
 Ronald L. Jensen
 Norman J. Kalcheim
 Jim Y. Miyano
 Patricia Roberts
 Rodger H. Sandoval
 Rosalyn Switzen
 Ellen Winston
 George K. Wyman

ORGANIZATION AND PLANNING FOR THE OLDER POPULATION

Chairman: Cernoria D. Johnson

S. Decker Anstrom
 Charles H. Chaskes
 Elias S. Cohen
 Timothy W. Costello
 W. Fred Cottrell
 Louva Dahozy
 Tim G. Flores

Mark Corrigan
 Cecil M. Harden
 Rhea M. Eckel
 Frank Manning
 Robert Medina
 William Rutherford
 Robert Santos

APPENDIX 1: (Cont'd)

TRAINING AND RESEARCH IN AGING

Chairman: George Maddox

Leonard Z. Breen
 Carl Eisdorfer
 Hiram J. Friedsam
 Sharon Fujii
 Milton Hagelberg
 A. Baird Hastings

Robert J. Havighurst
 Victor Kassel
 Ronald Moore
 George G. Reader
 Robert B. Robinson
 Stanley Smith
 John E. Worden, Jr.

SPIRITUAL SUPPORT FOR THE ELDERLY

Chairman: Louella C. Dirksen

Tary Adams
 Mrs. Delbert Campbell
 Reverend Donald Clingan
 The Rev. Msgr. Lawrence J. Corcoran
 Reverend Lowell R. Ditzen
 William C. Fitch

Clay Gibson
 Lois Gray
 Ruth H. Jewson
 Reverend Peter Kwon
 Josephine H. Kyles
 Marcella G. Levy
 Reverend Rudi Sanchez

REHABILITATION AND AGING

CHAIRMAN: Rudolph Danstedt

Roland Baxt
 Yung-Ping Chen
 Irene Cuch
 Dorothy Demby
 Ross Greenwood
 A.L. Kornzweig

Mrs. H. L. Picard
 Henry Robinson
 Jerome D. Schein
 Alice H. Suter
 Mary Ellen Tully
 Mrs. Doreen Varner
 Clara Yanez

NUTRITION

Chairman: Donald M. Watkin

Professor George M. Briggs
 Mrs. Angela Little Beaver
 Dr. Louis Fillios
 Mrs. Willard M. Jackson

Mrs. Vivian F. Lewis
 Miss Ruth E. Kocher
 Professor Jean Mayer
 Mrs. Irene H. Wolgamot

APPENDIX 2

ACTION ON AGING LEGISLATION

IN 92nd CONGRESS

APPENDIX 2

SUMMARY OF MAJOR LEGISLATIVE ACTIONS TAKEN
FROM THE WHITE HOUSE CONFERENCE ON AGING
(NOVEMBER 1971) TO APRIL 1, 1973

Important and potentially far-reaching legislative advances have occurred since the White House Conference on Aging in November 1971. Nowhere was this more evident than in the area of retirement income. A 20 percent increase in Social Security benefits has helped to reduce poverty for the elderly by an estimated 1.2 million since the White House Conference on Aging was called. Further advances were made with the enactment of the 1972 Social Security Amendments (P.L. 92-603).

Among the major legislative developments:

I. PROPOSALS RELATING TO RETIREMENT INCOME

20-Percent Social Security Increase (Church Amendment)

A. Legislative History

Senator Church's proposal for a 20-percent Social Security increase was adopted (by a vote of 82 to 4) as an amendment to the debt ceiling legislation (H.R. 15390) on June 30, 1972. A few hours later the House agreed to this measure by a vote of 302 to 35. On July 1, H.R. 15390 - along with the Church amendment - was signed into law.

B. Major Provisions

The Church amendment provided for a 20-percent across-the-board increase in Social Security benefits (for checks mailed in October 1972) for 28 million persons. Additionally, the measure will provide for automatic cost-of-living adjustments (operative beginning in 1975) to help make Social Security inflation proof for the elderly.

C. Status as of April 1, 1973

The Church amendment became law (P.L. 92-336) on July 1, 1972.

20-Percent Increase in Railroad Retirement Annuities
(H.R. 15927)

A. Legislative History

H.R. 15927 was approved by the House on August 9, 1972, and by the Senate on September 29. On October 4 the President vetoed the bill. However, the Congress decisively and swiftly overrode

Note: This report was specially prepared by the U.S. Senate Special Committee on Aging.

the veto on October 4 by a vote of 353 to 29 in the House and 76 to 5 in the Senate.

B. Major Provisions

H.R. 15927 provided a temporary (scheduled to expire on June 30, 1973) 20-percent increase in Railroad Retirement annuities for more than 700,000 railroad workers and their dependents. The Act also directed representatives of management and labor to report to the Congress on their mutual recommendations to insure the solvency of the Railroad Retirement account and to make the increase permanent.

C. Status as of April 1, 1973

H.R. 15927 became Public Law 92-460 without the signature of the President on October 4, 1972.

1972 Social Security Amendments (H.R. 1)

A. Legislative History

H.R. 1 was passed by the House of Representatives on June 22, 1971, and by the Senate on October 5, 1972. Differences in the House and Senate versions were then resolved in conference committee. The bill was approved on October 17 by the House and Senate. The President signed the bill into law on October 30, 1972.

B. Major Provisions

Important reforms were incorporated in the cash benefits and adult public assistance programs, including the following:

Increase in widow's and widower's insurance benefits: More than 3 million widows and dependent widowers received increased benefits (effective January 1973) under the 1972 Social Security Amendments. Approximately \$1.1 billion in additional benefits will be paid to widows and dependent widowers in 1974.

Special minimum payment: A new special minimum monthly benefit was enacted for workers with long periods of covered employment and low lifetime earnings. The special minimum is computed by multiplying \$8.50 by a worker's number of years in covered employment in excess of ten years but not greater than 30.

Delayed Retirement credit: The 1972 Social Security Amendments provided an increase in retirement benefits of 1 percent for each year after age 65 and before age 72 that an individual delays retirement.

Age-62 computation for men: Under prior law, the method of computing benefits for men and women differed in that years up to age 65 were taken into account in determining average earnings for men (years up to age 62 were taken into account for

women). H.R. 1 (P.L. 92-603) eliminated this difference in treatment and established an age-62 computation point for men, the same as now exists for women. This provision became effective in January 1973 and will become fully operative in January 1975.

Liberalization of the retirement test: Four important changes were made in the retirement test: (a) The amount that a beneficiary under age 72 may earn in a year and still receive all his Social Security benefits for the year was increased from \$1,680 to \$2,100. (b) For wages in excess of this amount, \$1 in benefits is now withheld for each \$2 of earnings. Under prior law the \$1-for-\$2 reduction applied only to earnings between \$1,680 and \$2,880. Thereafter, benefits were reduced for each dollar of earnings above \$2,880. (c) Earnings in and after the month in which a person attains 72 are not included, as they were under prior law, in determining his total earnings for the year. (d) The amount of exempt earnings will increase automatically in proportion to the rise in average earnings, whenever Social Security benefits are increased automatically.

Reduction in waiting period for disability benefits: The waiting period for a person to qualify for disability benefits was reduced by one month - from six months to five months.

Supplemental Security Income Program: The 1972 Social Security Amendments established a new Supplemental Security Income program to replace the adult categorical assistance programs (aid for the aged, blind, and disabled). The SSI program, which will become effective in 1974, will build a floor under the incomes of older Americans: \$130 a month for single elderly persons and \$195 for aged couples. Additionally, the first \$20 of monthly income will be disregarded in determining eligibility for the supplemental payment.

C. Status as of April 1, 1973

Most of the provisions in H.R. 1 (P.L. 92-603) became effective in January 1973. However, the new Supplemental Security Income program will become operative in January 1974.

Proposed Increases in Veterans' Pensions (S. 4006)

A. Legislative History

S. 4006 was introduced by Senator Hartke on September 19, 1972. The bill was passed by the Senate on October 11, 1972. However, there was not sufficient time for the House to act on the bill before adjournment of the 92nd Congress.

B. Major Provisions

S. 4006 proposed (a) a \$400 increase in the annual income limitations for veterans and their survivors and (b) a boost in pension rates averaging 8 percent.

C. Status as of April 1, 1973

Identical legislation (S. 275) was reintroduced by Senator Hartke on January 9, 1973.

Tax Credit for Property Taxes (S. 1960)

A. Legislative History

Sponsored by Senator Eagleton, S. 1960 was approved as an amendment to the Revenue Act (H.R. 10947) on November 20, 1971 by a vote of 65 to 19. However, this measure was later removed in Conference Committee. The Revenue Act was signed into law (P.L. 92-178) on December 10, 1971 without the tax credit provision for property taxes.

B. Major Provisions

S. 1960 proposed a Federal income tax credit up to \$300 for aged homeowners (at least 65 years of age) with adjusted gross incomes not exceeding \$6,500. In the case of tenants, 25 percent of their income was deemed to be property taxes under S. 1960.

C. Status as of April 1, 1973

The Intergovernmental Relations Subcommittee of the Senate Government Operations Committee is scheduled to hold hearings on property tax relief proposals in May 1973.

II. PROPOSALS RELATING TO HEALTH CARE

Health Security Act (S. 3)

A. Legislative History

On January 25, 1971, Senator Edward M. Kennedy introduced the Health Security Act (S. 3). A companion measure, H.R. 22, was introduced on January 22, 1971, by Representative Martha W. Griffiths. S. 3 was referred to the Senate Committee on Finance, where hearings were held but no further action was taken. H.R. 22 was referred to the House Ways and Means Committee, where hearings were completed but no further action was taken.

S. 3 was reintroduced in the 93rd Congress on January 4, 1973. The companion measure, H.R. 22, was reintroduced on January 3, 1973.

B. Major Provisions

S. 3 and H.R. 22, as originally introduced, contained these major provisions affecting the elderly:

1. Medicare would be replaced by a health insurance program and Medicaid would become a supplementary program. Beginning in mid-1973, there would be provision for comprehensive health insurance coverage, including preventive and disease detection services; care and treatment of illness; and medical rehabilitation.

2. There would be no cutoff points; no coinsurance (requiring out-of-pocket payments as under Medicare); no deductibles (calling for additional payments by patients as Medicare does); and no waiting period. Coverage under the program would be automatic. There would be no "means test" (as under Medicaid).

3. Virtually all health services would be covered in full except there would be certain limitations for nursing home care; dental care; psychiatric care; and prescription drugs.

S. 3 and H.R. 22, as reintroduced in the 93rd Congress, contain these major changes affecting the elderly:

1. Dental Benefits. The Health Security Board is authorized to extend the coverage for dental services (limited to children up to age 15 at the start) factor than the timetable specified in the legislation if adequate manpower is available. In addition, the Board is required, within seven years of the effective date of the legislation, to publish a timetable for phasing in the entire adult population.

2. Health Maintenance Organizations. The name "comprehensive health service organization" is changed to "health maintenance organization." HMOs will now be required to furnish or arrange for all covered services except mental and dental services.

3. Professional Foundations. Medical foundations are given the same expanded drug benefit previously available only in HMOs. That is, a full range of prescription drugs is now covered for all patients served through HMOs or foundations. The foundations are required to provide the same range of services as an HMO.

4. Maintenance and Long-Term Care. A new section gives the Health Security Board authority to make grants for pilot projects to test the feasibility of home maintenance care for chronically ill or disabled people. If experience under these projects proves that home maintenance services reduce the need for institutional care and can be administered in such a way as to control inappropriate or unnecessary utilization, the Health Security Board is authorized to recommend expansion of these services to the entire population.

C. Status as of April 1, 1973

S. 3 has been referred to the Senate Committee on Finance. H.R. 22 has been referred to the House Ways and Means Committee. Hearings are expected on these measures and other national health insurance proposals, but no dates have been set as of this time.

1972 Social Security Amendments (H.R. 1)

A. Legislative History

H.R. 1 was passed by the House of Representatives on June 22, 1971, and by the Senate on October 5, 1972. Differences in the House and Senate versions were then resolved in conference committee. The conference bill was approved on October 17 by the House and Senate. The President signed the bill into law (P.L. 92-603) on October 30, 1972.

B. Major Provisions

H.R. 1 made important changes in Medicare and Medicaid, including the following:

Medicare coverage for the disabled: Nearly 1.7 million disabled Social Security beneficiaries under age 65 will be entitled to Medicare coverage (beginning in July 1973) provided they have been entitled to disability benefits for at least 24 consecutive months.

Payments to Health Maintenance Organizations (HMOs): The 1972 Social Security Amendments authorized Medicare beneficiaries to enroll in prepaid group health plans, with the Government paying the HMO on a capitation basis.*

Home Health Insurance: The coinsurance requirement of 20 percent of the reasonable charges - after the \$60 deductible under Part B is met - was eliminated for home health services under Part B.

Coverage of Persons Needing Kidney Transplantation or Dialysis: Medicare protection was provided against the cost of hemodialysis and kidney transplantation for almost all Americans afflicted with that disease, beginning after the third month of treatment.

Future Part B premium increases: For fiscal years 1974 and thereafter, the increases for Part B premiums (Supplementary Medical Insurance) will be limited to not more than the percentage by which Social Security cash benefits had been generally raised since the last Part B premium adjustment. Costs above those met by such premium payments will be paid out of general revenues, in addition to the regular general revenue matching.

Automatic enrollment in Part B: The 1972 Social Security Amendments provided for the automatic enrollment under Part B for the elderly and disabled as they become eligible for Part A Hospital Insurance coverage. However, persons eligible for automatic coverage must also be fully informed about the procedure and given an opportunity to decline the coverage.

Eliminate three-year requirement to enroll in Part B: The prior three-year time limit for enrollment and reenrollment (after an initial termination) in Part B of Medicare was removed in H.R. 1.

Coverage of chiropractic services under Part B: Part B Medicare coverage was expanded to include services performed by licensed chiropractors. Such services will include treatment of the spine by means of manual manipulation which the chiropractor is legally authorized to perform. Claims for such treatment must be verifiable with a satisfactory X-ray indicating the existence of subluxation of the spine.

Expansion of covered physical therapy services: Part B coverage for reimbursable physical therapy services will be expanded (beginning July 1973) to include services provided in a physical therapist's office pursuant to a physician's plan of treatment. Benefit payments in one year for services by an independent practitioner in his office or the patient's home cannot, however, exceed \$100.

C. Status as of April 1, 1973

Most of the provisions in Public Law 92-603 became effective in January 1973. However, some proposals - such as Medicare coverage for the disabled - will become effective in July 1973.

Health Maintenance Organization and Resource
Development Act (S. 3327)

A. Legislative History

Senator Kennedy introduced S. 3327 on March 13, 1972. The Senate approved this measure by a vote of 60 to 14 on September 20. S. 3327 was then referred to the House Interstate and Foreign Commerce Committee on September 25. However, no final action was taken on this legislation by the House before the Congress adjourned.

B. Major Provisions

S. 3327 provided support for health maintenance organizations, supplemental health maintenance organizations, health service organizations, and area health education and service centers. Additionally, it provides for the establishment of an independent Commission on Quality Health Care Assurance.

C. Status as of April 1, 1973.

Senator Edward Kennedy reintroduced similar HMO legislation (S. 14) on January 4, 1973.

Public Health Service Act Extension of 1973
(S. 1136)

A. Legislative History

On September 20, 1972, the Senate passed S. 3716, which provided for one-year extensions of Public Health Service Act programs which were due to expire June 30, 1973. The bill was intended to provide Congress with sufficient time to consider whether each of the affected programs should be extended, modified, or ended. The House, however, failed to act on the extension bill before adjournment of the 92nd Congress.

On March 8, 1973, S. 1136, the Public Health Service Act Extension of 1973, was introduced in the Senate. It was passed by the Senate on March 27, 1973, by a vote of 72 to 19. Its purpose is the same as that of the 1972 extension proposal. A similar measure, H.R. 5608, was introduced in the House on March 14, 1973.

B. Major Provisions

S. 1136 would extend for one year, through fiscal year 1974, at 1973 authorization levels, the following programs: health services research and development; health statistics; public health training; migrant health; comprehensive health planning; Hill-Burton hospital construction and modernization; regional medical programs; allied health training; medical libraries; and community mental health centers.

H.R. 5608 would extend the same programs as does the Senate bill, with the following additions: Public health training; population research and family planning; and the Development Disabilities Construction Act.

C. Status as of April 1, 1973

Hearings on H.R. 5608 were concluded on March 29, 1973, by the Subcommittee on Public Health and Environment of the House Interstate and Foreign Commerce Committee.

III. PROPOSALS RELATING TO LONG-TERM CARE

1972 Social Security Amendments (H.R. 1)

A. Legislative History

H.R. 1 was passed by the House of Representatives on June 22, 1971 and by the Senate on October 5, 1972. Differences in the House and Senate versions were resolved in conference committee. The conference bill was approved on October 17 by the House and Senate. The President signed the bill into law on October 30, 1972.

B. Major Provisions

H.R. 1 contained several provisions with a major impact on long-term care, including the following:

Protection against retroactive denial of payments: The 1972 Social Security Amendments authorized the Secretary of Health, Education and Welfare to establish, by diagnosis, minimum periods after hospitalization during which a patient is presumed to be eligible for skilled nursing facility and home health benefits.

Demonstrations and reports: Several demonstration projects were authorized in the area of long-term care, including elimination of the three-day prior hospitalization requirement for admission to a skilled nursing facility; determination of the most appropriate methods of reimbursing the services of physicians' assistants and nurse practitioners; and provision for day care services to older persons eligible under Medicare and Medicaid.

Long-term care institutions on Indian reservations: The Secretary of HEW, rather than the States only, was authorized to certify institutions on Indian reservations as intermediate care facilities or skilled nursing facilities.

Disclosure of ownership of intermediate care facilities: Intermediate care facilities not otherwise licensed as skilled nursing homes by a State were required to make ownership information available to the appropriate State licensing agency.

Penalty for false acts and false reporting: Penalties (including fines, imprisonment, or both) were provided for fraudulent acts and false reporting under Medicare, including offering or accepting of kickbacks.

Conforming standards for skilled nursing facilities: Uniform standards were mandated for skilled nursing facilities under Medicare and Medicaid.

Federal financing of nursing home inspections: Full Federal reimbursement for the survey and inspection costs of skilled nursing and intermediate care facilities under Medicaid was provided from October 1972 through June 1974.

C. Status as of April 1, 1973

Most of the long-term care provisions in H.R. 1 (P.L. 92-603) became effective in January 1973.

IV. PROPOSALS RELATING TO HOUSING

Housing and Urban Development Act of 1972 (S. 3248)

A. Legislative History

The Housing and Urban Development Act of 1972 (S. 3248), which included a number of important provisions for older Americans, passed the Senate on March 2, 1972, by a vote of 80 to 1.

B. Major Provisions

Major provisions of S. 3248-affecting the elderly included the following:

1. The authorization level of the section 202 program for the elderly would be increased to \$750 million, an increase of \$100 million.
2. A new position of Assistant Secretary of Housing for the Elderly would be established at the Department of Housing and Urban Development to administer all HUD programs providing assistance to the elderly.
3. In the Multifamily Housing Assistance section (502), not less than 15 percent nor more than 25 percent of the total funds appropriated would be available for projects planned in whole or in part for the elderly.
4. The Secretary of Housing and Urban Development would be authorized to make additional assistance payments or rent supplemental payments for up to 60 percent of the units in any multifamily housing project (section 502) in which all or substantially all of the units are occupied by elderly families.

C. Status as of April 1, 1973

The House companion bill (H.R. 16704) was reported out of the Banking and Currency Committee on September 21, 1972. However, the House Rules Committee did not act on this legislation because it believed that there was too little time left in the session to consider a bill so large with so many controversial sections.

Continuing Resolution (H.J. Res. 1301)

A. Legislative History

H.J. Res. 1301 passed the House on October 2, 1972, and passed the Senate with an amendment on October 6, 1972.

B. Major Provisions

As finally approved H.J. Res. 1301 extended the authority for all FHA insurance programs from October 1, 1972, to June 30, 1973. It also authorized \$150 million more for public housing and \$250 million more for urban renewal.

C. Status as of April 1, 1973

H.J. Res. 1301 was approved on October 18, 1972, and became Public Law 92-503.

V. PROPOSALS RELATING TO OLDER AMERICANS ACT

Older Americans Comprehensive Services Amendments
(H.R. 15657 - S. 4044)

A. Legislative History

H.R. 15657 (the Comprehensive Older Americans Services Amendments) passed the House by a vote of 351 to 3 on July 17, 1972. Similar legislation (S. 4044) was unanimously approved (89 to 0) in the Senate on October 3. In conference committee the short title of the bill was changed to Older Americans Comprehensive Services Amendments. On October 30 the President pocket-vetoed H.R. 15657.

B. Major Provisions

Major changes and innovations were incorporated in the Older Americans Comprehensive Services Amendments of 1972. Among the key provisions:

Federal Council on Aging: A 15-member Federal Council on Aging would replace the Advisory Committee on Older Americans. The new Council would advise and assist the President on matters relating to the special needs of older Americans.

It would also act as a spokesman on behalf of the elderly in making recommendations to the President and Congress concerning

Federal policies in the field of aging. And, the Council would undertake a study of (a) the interrelationship of programs for the elderly and (b) the combined impact of all taxes affecting the aged.

Strengthening of Administration on Aging: Three fundamental changes were incorporated in H.R. 15657 to strengthen AoA: (1) AoA would be transferred out of the Social and Rehabilitation Service to the Office of the Secretary of HEW; (2) the Commissioner would be directly responsible to the Secretary; and (3) the Commissioner would not be able to delegate any of his functions to any officer who is not responsible to him unless he submits a delegation plan to the Congress.

Model projects: A Model Project program would be established to concentrate on special problems of the elderly, including housing, transportation, continuing education, preretirement counseling, and social services for handicapped elderly Americans.

Title III grants for State and area programs: The existing Title III Community Grants program would be replaced by new State and Area programs to encourage the development of comprehensive and coordinated social service systems through the establishment of planning and service areas.

Multidisciplinary centers of gerontology: Federal funding would be authorized for new multidisciplinary centers of gerontology to conduct basic and applied research on (a) work, leisure, and education of older Americans; (b) living arrangements; (c) the economics of aging; and (d) other related areas.

Multipurpose senior centers: Federal funding would be authorized for leasing, altering, renovating, or constructing facilities to be used for multipurpose senior centers. Federal funding would also be authorized to cover the costs of professional and technical personnel.

Foster grandparents: The concept of the foster grandparent program would be expanded to include supportive services to children and adults in community settings, as well as services for institutionalized children.

C. Status as of April 1, 1973

Senator Eagleton reintroduced the Older Americans Comprehensive Services Amendments (S. 50) on January 4, 1973. Companion legislation (H.R. 71) was introduced by Representative Brademas on January 3. S. 50 was approved by the Senate on February 20 by a vote of 82 to 9. The Senate-passed bill reduced the authorized funding level (over a 3-year period) by nearly \$500 million, compared with the 1972 legislation pocket-vetoed by the President. Similar legislation - although at a further reduced funding level - was passed (329 to 69) in the House on March 13.

VI. PROPOSALS RELATING TO SOCIAL SERVICES

Social Services to the Aged (S. 582)

A. Legislative History

S. 582 was introduced by Senators Scott and Schweiker on January 29, 1973. The bill has been referred to the Committee on Finance.

B. Major Provisions

The bill would exempt social services to the aged under the Social Security Act from the requirement that not more than 10 percent of a State's funding allotment could be directed toward non-welfare recipients.

C. Status as of April 1, 1973

S. 582 is pending in the Finance Committee.

Social Services to the Aged, Blind and Disabled (H.R. 3819)

A. Legislative History

H.R. 3819 was introduced by Representative Heinz on February 6, 1973, and was referred to the Committee on Ways and Means.

B. Major Provisions

H.R. 3819 would exempt social services to the aged, blind and disabled under the Social Security Act from the requirement that not more than 10 percent of a State's funding allotment would be directed toward non-welfare recipients.

C. Status as of April 1, 1973

The bill is pending in the Ways and Means Committee.

Limitation on Social Services Regulations (S. 1220)

A. Legislative History

S. 1220 was introduced by Senator Mondale and 20 cosponsors on March 16, 1973.

B. Major Provisions

The bill would limit the authority of the Secretary of Health, Education, and Welfare to impose, by regulations, additional restrictions on the use of Federal funds under the Social Security Act. Five areas under existing regulations would be preserved. Four areas are of interest to the elderly:

- The use of privately contributed funds and in-kind contributions as part of a State's share for Federal reimbursement.
- The authority of a State to define classes of individuals eligible to receive social services.
- The authority of a state to include as social services in its State plan comprehensive service programs for the elderly.
- Reasonable reporting requirements.

C. Status as of April 1, 1973

S. 1220 is pending in the Senate Finance Committee.

Model Regulations for Social Services (H.J. Res. 432)

A. Legislative History

H.J. Res. 432 was introduced by Representative Reid and 82 cosponsors on March 14, 1973.

B. Major Provisions

The joint resolution prescribed model regulations governing implementation of the provisions of the Social Security Act relating to the administration of social service programs. Certain areas are of interest to social service programs for the elderly:

- The model regulations would prescribe individual service plans but goals would be broad and would include self-care, community-based care and institutional care.
- Redeterminations of eligibility could not be made more often than annually.
- "Potential" welfare recipient would be defined as one likely to become a recipient of financial assistance within 5 years.
- No time limit would apply to former welfare recipients.
- Group eligibility in low-income neighborhoods would be included.
- Unrestricted donated private funds could be considered as State funds in claiming Federal reimbursement.
- Although the scope of social services would be defined, additional services could be included in a State plan if accompanied by a written justification and approved by the Secretary of HEW.

C. Status as of April 1, 1973

H.J. Res. 432 has been referred to the House Ways and Means Committee, where it is pending.

VII. PROPOSALS RELATING TO AGE DISCRIMINATION AND OTHER PROBLEMS OF OLDER WORKERS

Age Discrimination in Employment Act Amendments

A. Legislative History

An amendment sponsored by Senator Bentsen was incorporated in S. 1861 - the Fair Labor Standards Amendments - when the Senate Labor and Public Welfare Committee reported this bill on June 8, 1972. S. 1861, including the Bentsen amendment, was approved by the Senate on July 20, 1972. However, the House failed to agree to go to conference committee with the Senate to reconcile differences in the two versions of the minimum wage legislation (the House bill did not include amendments to the Age Discrimination in Employment Act). Consequently, the Congress adjourned without enacting the minimum wage and age discrimination amendments.

B. Major Provisions

The Bentsen amendment would have extended the application of the Age Discrimination in Employment Act to employees of State and local governments. Additionally, the amendment would have established age discrimination employment standards for Federal employees, with enforcement responsibilities assigned to the Civil Service Commission.

C. Status as of April 1, 1973

Similar legislation (S. 635) was reintroduced by Senator Bentsen early (January 31, 1973) in the 93d Congress.

Retirement Income Security for Employees Act (S. 3598)

A. Legislative History

S. 3598 - the Retirement Income Security for Employees Act - was reported out by the Senate Labor and Public Welfare Committee on September 15, 1972. The bill was re-reported by the Senate Finance Committee on September 25, but without the provisions for vesting minimum funding requirements, reinsurance, and portability of pension credits. No final action was taken in the Senate.

Action in the area of pension reform was also undertaken by the House of Representatives during the 92d Congress. The House Ways and Means Committee conducted seven days of hearings on pension

proposals in May 1972. Additionally, a Pension Task Force Staff was established (under the jurisdiction of the General Labor Subcommittee of the House Education and Labor Committee) in November 1971 to provide more detailed information about the status of private pension plans. An interim staff report was issued in June 1972.

B. Major Provisions

Major provisions in the Labor and Public Welfare Committee bill included:

- Vesting requirements to entitle employees to 30 percent of accrued pension credits after 8 years of service, and an additional 10 percent for each year thereafter until fully vested after 15 years.
- Funding requirements to assure that all pension liabilities will be funded after 30 years.
- Federally-administered mandatory insurance programs to protect plan participants against loss of benefits because of pension plan failures.
- A voluntary program for portability of pension credits through a central fund administered by the Department of Labor.
- New rules of conduct for pension fund trustees and fiduciaries.

C. Status as of April 1, 1973

The Retirement Income Security for Employees Act was reintroduced (January 4, 1973) as S. 4 during the 93d Congress by Senators Williams and Javits. S. 4 was ordered reported by the Labor Subcommittee of the Senate Labor and Public Welfare Committee on March 5, 1973. The bill was then reported out unanimously by the full committee on March 29, 1973.

Older American Community Service Employment Act
(Title IX of the Older Americans Comprehensive Services
Amendments, H.R. 15657 - S. 4044)

A. Legislative History

Senator Kennedy introduced S. 555 (the Older American Community Service Employment Act) on February 2, 1971. Hearings were held on S. 555 and other employment measures by the Subcommittee on Aging of the Senate Labor and Public Welfare Committee in July 1971. S. 555 was ordered reported by the full committee on June 21, 1972. The senate unanimously approved (77 to 0) this legislation on September 21, 1972. Because it was

not possible for the House to act on this proposal before adjournment, S. 555 was added as Title IX to S. 4044, the Comprehensive Older Americans Services Amendments. Title IX was retained in the conference report (the conference report changed the popular name of the bill to the Older Americans Comprehensive Services Amendments) on the bill (H.R. 15657 - S. 4044). However, the President later pocket-vetoed (on October 30, 1972) H.R. 15657.

B. Major Provisions

S. 555 would create new job opportunities in a wide range of community service activities for low-income persons aged 55 and above. A 2-year funding authorization of \$250 million was provided to carry out the purposes of the act.

C. Status as of April 1, 1973

The Older American Community Service Employment Act was included as Title IX of S. 50, the Older Americans Comprehensive Services Amendments, which was approved by the Senate on February 20, 1973. The House-passed (March 13, 1973) version also retained Title IX but reduced funding for the older worker employment program by \$100 million.

Middle-Aged and Older Workers Training Act
(Title X of the Older Americans Comprehensive
Services Amendments, H.R. 15657 - S. 4044)

A. Legislative History

Senator Randolph introduced S. 1307 (the Middle-Aged and Older Workers Employment Act) on March 19, 1971. Hearings were held on this legislation by the Subcommittee on Aging of the Senate Labor and Public Welfare Committee in July 1971. The bill was ordered reported by the Labor and Public Welfare Committee on June 21, 1972. However, to expedite its consideration, this measure was added in modified form (the short title of the legislation was changed to the Middle-Aged and Older Workers Training Act) as Title X of S. 4044, the Comprehensive Older Americans Services Amendments. This title was retained in amended form in the conference report (the conference report changed the popular name of the bill to the Older Americans Comprehensive Services Amendments) on this legislation (H.R. 15657 - S. 4044). The conference bill was pocket-vetoed by the President on October 30, 1972.

B. Major Provisions

The Middle-Aged and Older Workers Training Act would establish a comprehensive Midcareer Development Services program to provide training, counseling, and special supportive services for unemployed or underemployed persons aged 45 or older. Moreover, it would authorize "strike forces" to provide placement and recruitment services in communities where there is large

scale unemployment because of a plant shutdown or other permanent reduction in the work force.

C. Status as of April 1, 1973

The Middle-Aged and Older Workers Training Act was reintroduced as Title X of the Older Americans Comprehensive Services Amendments (S. 50) on January 4, 1973. S. 50 passed the Senate on February 20 by a vote of 82 to 9. However, Title X was deleted from the House version of this legislation (H.R. 71). H.R. 71 passed the House on March 13, 1973.

VIII. PROPOSALS RELATING TO NUTRITION

Nutrition Program for the Elderly (S. 1163)

A. Legislative History

S. 1163 was approved unanimously (89 to 0) by the Senate on November 30, 1971. The House passed almost identical legislation on February 7, 1972, and the Senate agreed to the House amendment on March 7, 1972. President Nixon signed the bill into law (P.L. 92-258) on March 22, 1972.

B. Major Provisions

S. 1163 authorized a national hot meals program for persons 60 and over in conveniently located centers, such as senior citizen centers, schools, and other nonprofit settings. Funding in the amount of \$250 million - \$100 million for fiscal 1973 and \$150 million for fiscal 1974 - was authorized to carry out the purposes of the Act.

C. Status as of April 1, 1973

No funding has been provided for this law because the President has vetoed two Labor-HEW appropriations bills in 1972. However, efforts were initiated in 1973 by Senators Kennedy (the original sponsor of S. 1163) and Church to win funding in a Supplemental Appropriations bill for the Nutrition Program for the Elderly.

IX. PROPOSALS RELATING TO TRANSPORTATION

The Emergency Commuter Relief Act (S. 386)

A. Legislative History

S. 386 was introduced by Senator Williams on January 16, 1973, and was referred to the Committee on Banking, Housing and Urban Affairs. Hearings were held in February. Almost identical provisions of the bill were passed by the Senate in the 91st and 92d Congresses, but failed final enactment.

B. Major Provisions

S. 386 would provide for Federal operating assistance to mass transit systems. Also provided would be an additional \$3 billion in contract authority under the Urban Mass Transportation Assistance Act to sustain the capital grant program through fiscal year 1977.

C. Status as of April 1, 1973

S. 386 was added as an amendment to the Federal Aid Highway Act Amendments (S. 502) which passed the Senate on March 15, 1973.

Abzug Amendment to Housing and Urban Development
Act of 1972 (H.R. 16704 - S. 3248)

A. Legislative History

H.R. 16704 was introduced by Congressman Patman on September 18, 1972, and referred to the Committee on Banking and Currency. The bill was reported out of committee on September 21, but was not voted on in the House.

B. Major Provisions

Of interest on transportation is an amendment added by Congresswoman Bella Abzug which would have provided that an applicant for a grant or loan under the Urban Mass Transportation Act offer assurances that fares charged to the elderly and handicapped in non-peak hours would not exceed one-half of the general rate. The Senate housing bill (S. 3248) did not, however, include this provision.

C. Status as of April 1, 1973

The Abzug amendment has not been reintroduced during the 93d Congress.

Reduced Airline Fares for Youths and Senior Citizens
(S. 181)

A. Legislative History

S. 181 was introduced by Senator Moss on January 4, 1973. An earlier version of this legislation (S. 1808) was also sponsored by Senator Moss during the 92d Congress. S. 1808 authorized reduced air fares for senior citizens on a space-available basis. On September 21, 1972, Senator Moss won approval of an amendment to S. 2280 (the Senate Anti-Hijacking bill). This amendment authorized reduced fares on a space available basis for individuals age 21 or younger or 65 and older. The Moss amendment was lost, however, because the Conferees were not able

to reconcile other differences between the respective Senate and House Anti-Hijacking bills.

B. Major Provisions

S. 181 would authorize reduced fares on airlines for youth (21 years of age and younger) and senior citizens (65 years of age and older) on a space-available basis.

C. Status as of April 1, 1973

Hearings are planned on S. 181 by the Aviation Subcommittee of the Senate Commerce Committee, but no definite dates have been set.

Older Americans Comprehensive Services Amendments
(H.R. 15657)

(Transportation provisions)

A. Legislative History

H.R. 15657 (the Comprehensive Older Americans Services Amendments) passed the House by a vote of 351 to 3 on July 17, 1972. Similar legislation (S. 4044) was unanimously approved (89 to 0) in the Senate on October 3. In conference committee the short title of the bill was changed to the Older Americans Comprehensive Services Amendments. On October 30 the President pocket-vetoed H.R. 15657.

B. Major Provisions

H.R. 15657 would authorize a special study to focus on several possible solutions for transportation problems of the elderly, including (a) the use of community transportation facilities, school buses, and excess Department of Defense vehicles and (b) the need for revised and improved procedures for obtaining motor vehicle insurance for older Americans. Additionally, the Commissioner on Aging would be directed to conduct research and demonstration projects to improve transportation services for the elderly by establishing special transportation subsystems, portal-to-portal services, and making payments directly to the elderly to enable them to obtain transportation services.

C. Status as of April 1, 1973

Senator Eagleton reintroduced the Older Americans Comprehensive Services Amendments (S. 50) on January 4, 1973. Companion legislation (H.R. 71) was also sponsored by Representative Brademas on January 3. S. 50 was approved in the Senate on February 20 and included the transportation provision in Title IV. The House approved similar legislation on March 13, but the special transportation research and demonstration measure was deleted. The

House-passed bill consolidated the transportation study and demonstration proposal into provisions relating to the Federal Council on the Aging (Title II of the bill) and the Model Projects section (Title III).

X. PROPOSALS RELATING TO CONSUMERS

Consumer Product Safety Act (S. 3419)

A. Legislative History

S. 3419 was introduced by Senator Magnuson on March 24, 1972. The bill passed the Senate on June 21. The House approved similar legislation on September 20. The House and Senate agreed to the conference report on the bill on October 13 and 14, respectively.

B. Major Provisions

The act established a Consumer Product Safety Commission to protect the public from unreasonable risk of injuries associated with consumer products. The Commission is authorized to promulgate product safety standards. The Commission will be assisted in its functions by a Product Safety Advisory Council. Also established is an Injury Information Clearinghouse which will collect, investigate, analyze, and disseminate injury data and information associated with consumer products.

C. Status as of April 1, 1973

S. 3419 became Public Law 92-573 on October 27, 1972

Consumer Protection Act of 1973 (H.R. 21)

A. Legislative History

H.R. 21 was introduced by Representative Holifield on January 3, 1973; and was referred to the Government Operations Committee. The bill is identical to H.R. 10835 which passed the House on October 14, 1971, by a vote of 344 to 44. A related bill in the Senate failed to reach a vote in the closing days of the 92d Congress.

B. Major Provisions

H.R. 21 would create a Consumer Protection Agency to provide representation for consumers and consumer interests before departments and agencies of the Federal Government and the courts. The bill would also provide a statutory basis for the Office of Consumer Affairs, now located in the Executive Office of the President. Also created would be a Consumer Advisory Council so that consumers themselves and persons familiar with their needs could provide advice and guidance to both units.

C. Status as of April 1, 1973

H.R. 21 is pending in the House Government Operations Committee. Joint hearings were held on similar legislation (S. 707) by the Senate Commerce Committee and the Government Operations Committee on March 27 and 28.

National No-Fault Motor Vehicle Insurance Act (S. 354)

A. Legislative History

S. 354 was introduced by Senator Magnuson on January 12, 1973, and was referred to the Committee on Commerce. The bill resembles S. 945 which was reported by the Committee on Commerce in the 92d Congress.

B. Major Provisions

S. 354 would create an automobile insurance system which would pay the basic economic loss of persons injured in automobile accidents whether or not they were "at fault". A State plan implementing the proposed Federal legislation would have to provide for severe limitations on cancellation and notice protection for nonrenewal.

C. Status as of April 1, 1973

Hearings were held in February on S. 354 by the Senate Commerce Committee.

Consumer Product Warranties and Federal Trade Commission Improvements Act (S. 356)

A. Legislative History

S. 356 was introduced by Senators Magnuson and Moss on January 12, 1973, and referred to the Committee on Commerce. The bill is similar in content to S. 986 which passed the Senate by a vote of 76 to 2 on November 8, 1971.

B. Major Provisions

S. 356 Would (1) provide minimum disclosure standards for written consumer product warranties against defect or malfunction and (2) define minimum Federal content standards for the warranties. The bill would also improve the consumer protection activities of the Federal Trade Commission.

C. Status as of April 1, 1973

S. 356 was scheduled to be acted upon by the Senate Commerce Committee on April 4, 1973.

XI. PROPOSALS RELATING TO RESEARCH AND TRAINING

Research on Aging Act (S. 887 - H.R. 14424)

A. Legislative History

In 1972 the Research on Aging Act (S. 887 and H.R. 14424) was approved by the House on July 18 and the Senate on September 21. On October 30 the President pocket-vetoed the bill. Similar legislation was reintroduced in the Senate (S. 775) and in the House (H.R. 65) early in 1973. Hearings were held on these proposals by the Public Health and Environment Subcommittee of the House Interstate and Foreign Commerce Committee (on March 16, 1973) and the Subcommittee on Aging of the Senate Labor and Public Welfare Committee (on March 27).

B. Major Provisions

The Research on Aging Act would establish a National Institute on Aging at the National Institutes of Health. The new institute would be responsible for conducting and supporting biomedical, social, and behavioral research and training related to the aging process.

C. Status as of April 1, 1973

The House Public Health and Environmental Subcommittee ordered reported the Research on Aging Act (now H.R. 6175) on March 21, 1973.

Older Americans Comprehensive Services Amendments
(Research and Training Provisions in H.R. 15657 - S. 4044)

A. Legislative History

H.R. 15657 (the Comprehensive Older Americans Services Amendments) passed the House by a vote of 351 to 3 on July 17, 1972. Similar legislation (S. 4044) was unanimously approved (89 to 0) in the Senate on October 3. In conference committee the short title of the bill was changed to the Older Americans Comprehensive Services Amendments. On October 30 the President pocket-vetoed H.R. 15657.

B. Major Provisions

H.R. 15657 included a number of important provisions affecting gerontological research and training, including the following:

Multidisciplinary centers of gerontology: The bill would authorize Federal funding to establish multidisciplinary centers of gerontology for the purpose of conducting research concerning (a) work; leisure and education of older Americans; (b) living arrangements; (c) the economics of aging; and (d) other related areas.

Increased authorized funding levels for research and training: Authorized funding for research and training would be increased substantially in the conference bill for research and training:

(In millions of dollars)

Training:		
Fiscal 1973	.....	15
Fiscal 1974	.....	20
Fiscal 1975	.....	25
Research:		
Fiscal 1973	.....	20
Fiscal 1974	.....	30
Fiscal 1975	.....	40

For fiscal 1972 research and training had a combined authorization of \$20 million under the Older Americans Act.

C. Status as of April 1, 1973

Senator Eagleton reintroduced the Older Americans Comprehensive Services Amendments (S. 50) on January 4, 1973. Companion legislation (H.R. 71) was also sponsored by Representative Brademas on January 3. S. 50 was approved by the Senate on February 20, and similar legislation was passed by the House on March 13.

Both the Senate and the House bills retained the provision for the multidisciplinary centers of gerontology. However, the authorized funding levels for research and training were cut back:

FUNDING FOR RESEARCH AND TRAINING, S. 50 (In millions of dollars)

	Fiscal 1973		Fiscal 1974		Fiscal 1975	
	House	Senate	House	Senate	House	Senate
Training	11	10	15	15	20	20
Research	15	15	25	20	30	25

XII. PROPOSALS RELATING TO DEATH WITH DIGNITY

Commission on Medical Technology and Dignity of Dying (H.R. 15576)

A. Legislative History

H.R. 15576 was introduced by Representative Carter on June 19, 1972. It was referred to the Committee on Interstate and Foreign Commerce. No hearings were held on the bill.

B. Major Provisions

H.R. 15576 would establish a Commission on Medical Technology and Dignity of Dying which would study under what circumstances

modern medical technology is being used to deny individuals the right to die with dignity, and under what circumstances Government funds prohibit the right to die with dignity and what are the costs of maintaining individual cases of support. The Commission would make recommendations on its findings.

C. Status as of April 1, 1973

Similar legislation (H.R. 2655) was reintroduced on January 23, 1973. This bill has been referred to the House Interstate and Foreign Commerce Committee, where it is pending.

XIII. PROPOSALS RELATING TO THE RURAL ELDERLY

Older Americans Home Repair Assistance Act (S. 2888)

A. Legislative History

Senator Church introduced S. 2888 (the Older Americans Home Repair Assistance Act) on November 19, 1971. The bill was originally referred to the Senate Banking, Housing and Urban Affairs Committee and then re-referred to the Senate Labor and Public Welfare Committee.

B. Major Provisions

S. 2888 would make a wide range of home repair services available to elderly homeowners who otherwise would have difficulty in paying for these services. Supplies and material would be furnished by the aged homeowner, but the labor would be provided without charge.

C. Status as of April 1, 1973

Senator Church reintroduced the Older Americans Home Repair Assistance Act (S. 633) on January 31, 1973. The bill has been referred to the Labor and Public Welfare Committee.

Older Workers Conservation Corps Act (S. 3208)

A. Legislative History

Senator Humphrey introduced the Older Workers Conservation Corps Act (S. 3208) on February 22, 1972. The bill was referred to the Senate Labor and Public Welfare Committee but no final action was taken on this legislation.

B. Major Provisions

S. 3208 would authorize \$150 million for fiscal 1974 to promote useful part-time work opportunities in conservation and environmental improvement activities for unemployed persons who are 55 years or older. Some of the activities performed by this conservation corps would include conservation of natural resources, environmental improvement, beautification, and community development projects.

C. Status as of April 1, 1973

Senator Humphrey reintroduced the Older Workers Conservation Corps Act (S. 1168) on March 12, 1973.

XIV. PROPOSALS RELATING TO OEO PROGRAMS

Economic Opportunity Act Amendments of 1972 (H.R. 12350)

A. Legislative History

The 1972 Economic Opportunity Act Amendments were approved by the House on February 17, 1972, and the Senate on June 29. The Senate and the House agreed to the conference report on September 5. H.R. 12350 was signed into law (P.L. 92-424) on September 19, 1972.

B. Major Provisions

Public Law 92-424 increased the recommended authorization for the Senior Opportunities and Services program to \$18 million for fiscal 1974. Moreover, the 1972 amendments authorized the Director to enter into contracts with private nonprofit organizations to provide services for certain target groups (such as the elderly) not being effectively served under Title II (Urban and Rural Community Action Programs) of the Act.

C. Status as of April 1, 1973

H.R. 12350 became Public Law 92-424 on September 19, 1972. Furthermore, the 1973 Older Americans Comprehensive Services Amendments (S. 50 and H.R. 71) include a provision to provide an additional \$7 million authorization for Senior Opportunities and Services programs for fiscal years 1973 and 1974.

XV. PROPOSALS RELATING TO LEGAL SERVICE

National Legal Services Corporation (Mondale Amendment)

A. Legislative History

Senator Mondale introduced Amendment No. 5 to S. 706 (Economic Opportunity Act Amendments) on February 1, 1973. Amendment No. 5 would establish a National Legal Services Corporation, patterned after the provisions contained in section 27 of the Conference Report on H.R. 12350, the 1972 Economic Opportunity Act Amendments. Section 27 was later deleted from the conference report on the 1972 OEO amendments. Amendment No. 5 has been referred to the Subcommittee on Employment, Manpower, and Poverty of the Senate Labor and Public Welfare Committee.

B. Major Provisions

Amendment No. 5 would create a 19 member National Legal Services Corporation to be appointed by the President with the advice

and consent of the Senate. Ten of the appointees would be from the general public and the remaining nine members would include:

- Five individuals representative of the organized bar and legal education;
- Two persons representative of clients' interests; and
- Two former legal services project directors.

The Mondale amendment would authorize \$121.5 million for fiscal 1974 to carry out the functions of the Corporation.

C. Status as of April 1, 1973 .

Amendment No. 5 is pending before the Subcommittee on Employment, Manpower, and Poverty of the Senate Labor and Public Welfare Committee.

PART B:

STATE AND PRIVATE SECTOR RESPONSE

-447-

(448 blank)

TABLE OF CONTENTS TO PART B:
STATE AND PRIVATE SECTOR RESPONSE

	<u>PAGE</u>
PREFACE	450
STATE ACTION SINCE THE WHITE HOUSE CONFERENCE	451
Section 1: State Legislation.....	455
Section 2: State Administrative Agencies.....	487
STRATEGIES FOR POSSIBLE ACTION AT THE STATE AND LOCAL LEVEL	581
REPORT OF ACTIVITIES BY NATIONAL ORGANIZATIONS AND OTHER PRIVATE SECTOR GROUPS.....	611

PREFACE TO PART B

While the Study Panels addressed their efforts primarily to evaluating Federal action regarding the Conference recommendations, a series of activities, at the direction of the Post-Conference Board, were undertaken to determine the response of State and local governments and the private sector to the Conference's recommendations. The activities included surveys of State legislatures, State administrative agencies, and national organization concerned about the elderly.

Questionnaires were sent to all State agencies on aging, plus other State agencies whose program responsibility involved the needs of older persons, and to national organizations. These organizations and groups were asked to provide responses to a set of standard questions about how they had acted or planned to act in response to the Conference recommendations.

Though not extensive or completely specific, the responses revealed a wide range of activities being undertaken at the State and local level and in the private sector. Some of this activity had been undertaken prior to and during the Conference while some had been initiated in response to specific ideas or proposals emanating from the Conference.

While the information presented on the following pages in no way represents the totality of action taken on behalf of older persons since the White House Conference on Aging by State and local government units, or by the private sector, the information does present a comprehensive overview as to the extent and variety of activities being undertaken.

STATE ACTION SINCE THE
WHITE HOUSE CONFERENCE:

Section 1:
STATE LEGISLATION

Section 1:

TABLE OF CONTENTS

	<u>Page</u>
1. Introduction	455
2. State and Local Government Organization	457
a. State units on aging	
b. Participation of older persons in governmental bodies	
c. Information and referral service	
d. Studies to improve government service programs	
e. Government and non-government relations	
3. Assuring an Adequate Income	459
a. Employment programs	
b. "Pass-along" legislation	
c. Improved access to benefits	
d. Repeal of lien laws	
e. Increased State pension and retirement benefits	
f. Age discrimination legislation	
g. Tax relief	
(1) Sales tax exemptions	
(2) Property or Homestead tax exemptions	
(3) Property tax refunds/assistance grants	
(4) Personal property tax reductions	
(5) Inheritance tax reductions	
(6) Income tax relief	
(7) Omnibus tax relief	
(8) Constitutional amendments initiated for tax relief	
(9) Emergency tax relief	
h. Resolutions to Congress	
4. Health Care	470
a. Nursing homes	
(1) Patient financial benefits	
(2) Construction funds	
(3) Regulation	
(4) Feasibility studies to build new homes	
(5) Operating subsidies	
b. Home health care programs	
c. Day care centers for older persons	
d. Expansion of State medical service coverage	
e. Facilitating medical assistance applications	
f. Resolutions to Congress	
g. Feasibility studies to expand or develop health care facilities	
5. Nutrition	475
a. Legislation to implement the Title VII Nutrition Program for the Elderly	
b. Facilities for nutrition programs	
6. Transportation	477
a. Reduced and free-fare systems	
b. Use of school and minibuses	
c. Special vehicle permits	
d. Age discrimination laws	

Table of Contents (Cont'd)

	<u>Page</u>
7. Housing	478
a. Construction of public housing	
b. Increase mortgage loan funds	
c. Codes and regulations	
d. Housing occupancy preference	
e. Study of special housing for older persons	
f. Housing allowances	
g. Rent protection	
h. Use of private proprietary homes	
i. Special exemptions from housing fees or taxes	
8. Leisure Activities.....	481
a. Recreation	
b. Volunteer programs	
c. Adult education	
9. Consumer Protection.....	483
a. Prescription drugs	
b. Licensing hearing aid dispensers	
c. Identification cards	
d. Miscellaneous	
10. Pending 1973 legislation	485

STATE LEGISLATIVE ACTION1. Introduction

Information about State legislation designed to assist older persons enacted since the White House Conference on Aging was reported by all the States that held legislative sessions in 1972. The widespread activity that was indicated in their reports reflects a growing awareness of, and responsiveness to, the needs of older persons by State legislators. The increased activity by State legislatures will have important implications for older persons down to the local community level. In many cases State action provides local communities more resources, enabling them to respond to the concerns of the elderly. This responsiveness by State legislatures to the Conference recommendations, the recent passage of federal Revenue Sharing, and the reverberations State legislation causes at the local level would suggest that older persons might be well-advised to look increasingly to the States for resolution of their various needs.

In the fall of 1972, information was collected in each State by the respective State units on aging, each of which responded promptly and comprehensively. Eleven States had no legislative session in 1972, but State agencies indicated that a number of new initiatives had been prepared, and they expected that positive action would be taken when their legislatures reconvened.

In order to update and validate the 1972 data and to examine action taken in early 1973, the State units on aging were polled again in March 1973. The results from this effort reflected a great deal of activity in the early stages of 1973 State legislative sessions designed to assist older persons. Since few State legislatures had completed their sessions in March, though, little final action was reported. However, a significant amount of pending legislation was under consideration, and this is noted in the last section of this report.

During 1972 more than 140 bills specifically for older persons were enacted by State legislatures, and this action comprises the major portion of the Report. A great deal of this legislation was enacted to ease the tax burden on older persons, and numerous new initiatives were implemented in health-related fields. Other action took place regarding State and local government organization, income maintenance, nutrition, transportation, housing, leisure activities, and consumer protection. Significantly, most States reported action in several areas of concern.

As a further measure of State legislative interest in the problem of older persons, several legislatures have created special committees on aging. These committees formulate most of the legislation designed for older persons in their respective States. This approach enables legislatures to deal specifically yet comprehensively with the concerns of the elderly. As such, other State legislatures concerned about meeting the needs of their older residents might consider establishing similar committees.

The following report on State legislative activity designed to assist older persons since the White House Conference on Aging is divided into eight sections. Each section represents an area of general concern for the elderly, i.e. income, health, etc.

Within each of these categories, legislative initiatives have been further divided in order to more accurately reflect the wide range of very specific legislation that has recently been enacted. All legislation that falls under each of these subdivisions is then listed by State. Sometimes the legislation is in synopsis form, and in other instances it is partially quoted. When such information was available, the bill number and/or statute listing is noted. The year (1972 or 1973) each law was enacted is indicated in parentheses at the beginning of every notation.

2. State and Local Government Organizations

Several States established strong, new State units on aging to increase the coordination of existing programs for the elderly and to renew advocacy efforts on behalf of older persons. Legislatures also enacted measures to increase the participation of older persons in governmental bodies and to more effectively disseminate information regarding resources and programs to older persons. Several States commissioned studies to explore means of improving service programs and delivery, and one recently took action to improve government and non-government relations.

a. State Units on Aging

Arizona

(1972) Created the Department of Economic Security which includes a "Section on Aging" to carry out the provisions of the Older Americans Act of 1965. The law also establishes a State Advisory Council on Aging composed of fifteen members appointed by the Director of the Department of Economic Security, with the approval of the Governor. (Senate Bill 1068; Chapter 142, Sessions Law 1972.)

Kentucky

(1972) Created a Kentucky Commission on Aging, consisting of seven members, at least one of whom shall be a person with no income except pension and social security payments. The members will be appointed by the Governor for a term of three years, selected on the basis of their interest in problems of the aging.

Florida

(1972) During the 1972 session, the Florida legislature passed a bill which established the Bureau on Aging by statute as a part of the Division of Family Services.

Briefly, it places on the Bureau the responsibility for what is and what is not being done for older people in Florida and for recommending action to the Governor and the legislature for programs which would provide services to meet unmet needs. It also continues the responsibility of the Bureau on Aging for administering programs of the aging under Federal legislation.

Vermont

(1972) The Interdepartmental Council on Aging was renamed the Vermont Office on Aging with department status under the Agency of Human Services.

b. Participation of Older Persons in Governmental BodiesNew York

(1972) Amended existing law to require that 60% of the members of the advisory committee in the Office for Aging be 60 years of age or over. (Chapter 322 - Amended Sec. 537, Executive Law)

California

(1972) Requires that if 7, rather than 5, local Housing Authority Commissioners are appointed, that the 2 additional Commissioners be project tenants and 1 of them be a senior citizen over 62 years of age. (AB 419)

Idaho

(1972) Of the seven (7) persons appointed by the Governor to be Commissioners, four (4) shall be persons of low income with a preference given to persons of minority race and senior citizens.

c. Information and Referral ServiceConnecticut

(1972) Provides that "the chief executive officer of each municipality shall appoint an employee of such municipality or its agency or commission on aging, or an elected official of the state or such municipality to act as an agent for the dissemination of information to elderly persons and to assist such persons in learning the community resources available to them, to assist them in applying for federal and other benefits available to the elderly and to publicize such resources and benefits." (P.A.70)

California

(1972) Required statement explaining senior citizens property tax assistance to be printed on county property tax bills and included with the homeowners exemption claim form sent to home owners; and required counties, where there was no franchise tax board office in the county, to include the address and telephone number of (1) the County Tax Collector or Assessor (2) nearest Franchise Tax Board Office. (AB 281)

d. Studies to Improve Government Service ProgramsSouth Carolina

(1972) Passed a resolution to continue the life of the Committee on Aging for the next session of the Legislature. The Committee was authorized to make a study of public and private services, programs and facilities for the aging in South Carolina, and of the laws pertaining to older persons.

Hawaii

(1972) Appropriated \$10,000 to the Legislative Reference Bureau to conduct a feasibility study of establishing a comprehensive service agency for Hawaii's senior citizens.

New Mexico

(1972) The Legislative Committee on Aging was authorized to study the needs of the older population, State Agencies responsible for meeting these needs, and to make recommendations for further legislation needed to provide more comprehensive services.

Virginia

(1973) Established a commission to study the needs of the elderly and the services available for the elderly in Virginia.

e. Government and Non-government RelationsIdaho

(1973) Authorized county commissioners to enter into contracts with private non-profit corporations to provide services that benefit older persons.

3. Assuring an Adequate Income

No other area of concern for older persons received greater attention by State legislatures than the provision of adequate incomes. Major action was taken to reduce current tax burdens on the elderly, ranging from increased property tax exemptions to income tax reductions. Legislatures also developed new employment programs for older persons, repealed lien laws, assured greater accessibility to benefits, enacted "pass-along" laws to ensure State grants would not be reduced due to the recent Social Security increase, implemented new age discrimination laws, and raised pension and retirement benefits.

a. Employment ProgramsMaryland

(1972) Created the Maryland Service Corps to encourage and develop a program of full and part-time public service involving citizens of all ages throughout the State in meeting the critical human needs of indigent residents, the needs of children, the elderly and mentally and physically disabled, and in meeting certain other needs. The Corps will be part of the State Department of Employment and Social Services. The Corpsmen and Corpswomen will be required to make a commitment of one year of service and receive living allowances of not more than \$100, but no salary. (H.B. No. 805; Chapter 354, Acts of 1972)

New York

(1972) Empowered Transportation Commissioner, Environmental Conservation Commissioner and State Council of Parks and Outdoor Recreation to contract with federally funded nonprofit organizations, organized for the beautification of highways, parks and recreation areas and to employ persons 60 years of age or older whose net annual income does not exceed \$1,000 to carry out such activities. The contract shall name the organization, the amount and manner of payment for service, the nature of service, the rendering of verified account of disbursements, the refund of unused amount, and other conditions as deemed proper. These contracts are for projects outside New York City. (Chapter 929 - Amended Sec. 14, Transportation Law, Sec. 14, Environmental Conservation Law, Sec. 663, Conservation Law)

b. "Pass-along" LegislationCalifornia

(1972) Increased adult categorical aid grants by \$12 commencing October 1, 1972, to reflect savings resulting from increased social security payments, and requires such increases to be taken into consideration in determining the October 1972 grant.

Requires counties to remit to the State each month amounts equivalent to 25 percent of the increases in social security benefits received in October by all recipients of aid to the needy disabled in the county and appropriates an amount each month from the general fund to every county sufficient to pay the total nonfederal cost of the \$12 grant increase.

California (continued)

These increases shall not replace, but are in addition to any other grant, including any cost-of-living adjustment or any grant for special needs for which recipients affected by this section are or may become eligible. (AB 1204)

(1972) Declared that legislative policy was not to reduce the current level of OAS (Old Age Security) for needy aged persons. (ACR 52)

Massachusetts

(1972) Approved a bill passing on to recipients of Old Age and Disability Assistance up to \$12.50 from the 20% Social Security Benefits that recently was passed by the Congress. (Chapter 788)

Wisconsin

(1972) Excluded the recent 20 percent increase in social security from the income determination of Old Age Assistance. (Chapter 87)

Rhode Island

(1972) Enacted "Pass along social security benefits" so no Old Age Assistance would be lost because of the recent Social Security 20 percent increase.

c. Improved Access to BenefitsCalifornia

(1972) Required OAS checks to be delivered early when the first day of the month falls on banking and postal holidays. (SB 311)

New York

(1972) Authorized the state office of aging to entertain and approve applications for interim payments on account of reimbursable expenditures, in the case of financial hardship to applicants. Reimbursements were not to exceed one-third (1/3) of the amount the applicant may reasonably be entitled to receive for a 3 month period. (Chapter 618-Amended Sec. 536, Executive Law)

d. Repeal of Lien LawsVermont

(1972) The requirement for liens to the state from recipients of Aid to the Aged was ended July 1st. This is being implemented retroactively so that all previously established liens are canceled also. (No. 249, Repealing 33 U.S.A. Sections 2655, 2656, 2657, 2658)

South Carolina

(1972) Repealed the Welfare Claim Law, which provided that recipients of Old Age Assistance with a gross estate valued at \$500 or more must repay the S.C. Department of Public Welfare for the amount of monetary assistance received.

Ohio

(1972) Removed the lien on property for those applying for Aid for the Aged benefits under the Public Welfare Department.

Idaho

(1972) Directed the Commissioner of Public Assistance to release all liens against a dwelling house or trailer house owned by a recipient of Old Age Assistance and occupied by him as his principal place of residence. Retroactive application was provided. (Amended Section 56-224) of the Idaho code)

e. Increased State Pension and Retirement BenefitsAlaska

(1972) Enacted an Old Timers Pension Bill which pays \$100 a month to any Alaskan over 65 who has resided continuously in the State for at least 25 years.

Mississippi

(1972) Increased by twenty percent the State benefits received by teachers who retired prior to 1953.

(1973) Increased pensions of retired State employees, and provided for cost-of-living adjustments.

Missouri

(1972) State teacher retirement and spouse benefits were increased and vesting time was reduced.

New York

(1972) Extended provisions providing for additional interest payment on funds deposited in the annuity savings fund by a contributor to the State teachers' retirement system for the purposes of purchasing additional annuity, to include the period beginning July 1, 1972 and ending June 30, 1973. (Chapter 332-Amended Sec. 516, Education Law)

(1972) Allowed a retired member of the state teachers retirement system receiving retirement allowance for other than a disability, to return to active public service; with retirement to be suspended during such service, with certain exceptions; makes other provisions as to contributions and retirement allowance on subsequent retirement. (Chapter 507-Amended Sec. 503, Education Law)

South Carolina

(1972) Passed a law for persons covered by the State Retirement System to count military service toward retirement at the rate of one year of military service for each two years of state employment with a maximum of six years of military service.

f. Age Discrimination LegislationNebraska

(1972) Revised Nebraska's age discrimination in employment act to make it compatible with the cognizant federal legislation, and to place the administration of the measure within the State Equal Opportunity Commission.

Iowa

(1972) Removed age discrimination, by adding the word "age" to the Civil Rights Code of Iowa, which now prohibits discrimination on the basis of age, race, color, creed, religion, or national origin.

Massachusetts

(1972) Eliminated discrimination relative to "age or sex" in vocational training institutions. (Chapter 101)

(1972) Provided that retail stores should not discriminate because of age in extending credit or charge account privileges to certain customers. (Chapter 542)

g. Tax Relief

(1) Sales Tax Exemptions

Connecticut

(1972) Allowed for a sales tax exemption on food products and meals for patients in hospitals, homes for the aged, convalescent homes, nursing homes and rest homes.

Alabama

(1972) Removed the sales tax from prescription drugs for persons over 65.

(2) Property or Homestead Tax Reductions

New Jersey

(1972) Granted homeowners 65 years old and older with incomes of \$5,000 or less a property tax deduction equivalent to the total amount of the annual tax bill or \$160, whichever is less, and excluded Social Security, Federal retirement benefits, and any pension, disability, or retirement benefits granted by the State, as income under law.

Rhode Island

(1972) Authorized a real estate exemption for the elderly.

Wisconsin

(1972) Lowered the required age from 65 to 62 for Homestead Tax Relief and allows the totally and permanently disabled who have reached the age of 60 to file for such relief. (Chapter 215)

(1972) Authorized the Department of Revenue to propose legislation to adjust the amounts of claims allowable under Homestead Tax Relief, taking into account findings that social security benefits and cost of living have increased or decreased. (Chapter 181)

(1972) Increased Homestead Tax Relief and raised the income limits from \$3,700 to \$5,000 and property tax or rent ceiling from \$330 to \$500. (Chapter 125)

Alabama

(1972) Raised the Homestead Exemption for older people.

Alaska

(1972) Provided property tax relief to anyone over 65 for the home that they occupy providing their income does not exceed \$10,000 per year.

Illinois

(1972) Granted a homestead exemption whereby elderly persons living in their own home may deduct \$1,500 from the assessed valuation. This is in addition to any further benefits to which they may be entitled.

Kansas

(1972) Enacted Homestead Property Tax Relief for taxpayers over age 65.

Kentucky

(1972) Authorized homestead tax exemptions for persons age 65 or older who own and maintain the property for which the exemption is sought as his personal residence.

Nebraska

(1972) Revised the State's homestead property tax exemption by limiting its provision to persons aged 65 and above and expanding its benefits to those individuals.

Texas

(1972) Prevented the eviction of older persons from their homes because of unpaid ad valorem taxes.

Ohio

(1972) Revised the State's homestead exemption law to make more older people eligible for property tax relief, by requiring that only the income of the homeowner and spouse be included in the homestead exemption application, and excluding the incomes of children and other relatives who might be living in the house. No reduction is provided when Household income exceeds \$8,000.

South Carolina

(1972) Extended the Homestead Exemption Act to elderly persons with Life Estates in, rather than Fee Simple titles to their homes. The Act provides for the exemption of real estate taxes on the first \$5,000 valuation of the homes of older persons.

New York

(1972) Increased from \$5,000 to \$6,000 the maximum amount of income which may be fixed by a municipality as the qualification for partial real property tax exemption for real property owned by certain persons 65 or over. (Chapter 771-Amended Sec. 467, Real Property Tax Law)

South Dakota

(1972) \$1,000 was deducted from the assessed valuation of property.

(3) Property Tax Refunds/Assistance Grants

California

(1972) Increased the amount of refunds for homeowners over 62 years of age having an annual income below \$10,000. As a result, a taxpayer at the \$5,000 income level will find his refund increased to 54% from the previous level of 45%. This bill is expected to allow senior citizens an additional 6.6 million dollars of tax relief. (AB 1201)

(1972) Granted additional aid in an amount not to exceed \$500 in any fiscal year to recipients of Old Age Security to pay property taxes on their homes in excess of \$180. (AB 1896)

Illinois

(1972) Enacted a provision whereby elderly persons whose income does not exceed \$10,000 per year may receive up to \$500 annually from the State of Illinois to assist them in paying property taxes on their homes. This law also provides that elderly renters are eligible for this grant from the State.

(1972) The plan allows a grant to any household occupied by an elderly or disabled person if the real estate tax paid exceeded 6% of the annual household income under \$3,000 or 7% if it is between \$3,000 or \$10,000. Grants would depend on the income level, decreasing from \$500 by \$5 for every \$100 in income.

(1972) For the purpose of determining a grant for a person living in an apartment or rented house, 25% of the rent is regarded as real estate tax the renter pays indirectly through his landlord.

West Virginia

(1972) Enacted legislation to provide general relief for low income citizens who are sixty-five years of age or over to aid them in providing or maintaining a homestead, by authorizing a claim for relief to be filed with the state tax commissioner and with payment from state funds, the amount of relief to be measured in part by the real property taxes or that portion of rent attributable to real property taxes paid by any such citizen. (House Bill No. 751)

(4) Personal Property Tax Reduction

Massachusetts

(1972) Exempted all "housing furniture" and effects from taxation under the Personal Property Tax. (Chapter 144)

(5) Inheritance Tax Reductions

Wisconsin

(1972) Reduced inheritance taxes on small estates and lowered administrator fees. (Chapter 310)

(6) Income Tax Relief

California

(1972) Eliminated relative responsibility of persons 60 years and over by 50% for income deductions; prorates liability of more than one responsible relative, and lowers scale for relatives responsibility. (AB 61)

(1972) Specified that the \$7.50 income exemption under present State law applies to responsible relative contributions under the Old Age Security Program. (AB 1029)

(1972) Provided that persons over sixty years of age who are responsible relatives under the Old Age Security Program be afforded a 50% allowance for income deductions. Established the actual monetary grant as the maximum amount of responsible relative contributions which may be collected. (AB 661)

Indiana

(1972) Persons with an income of \$5,000 or less were granted a \$1,000 exemption in reporting income for taxation purposes.

Idaho

(1972) Provided that a resident of the State of Idaho who has reached his sixty-fifth birthday before the end of his taxable year and has been allowed none, or less than all, of the tax credits provided by law shall be entitled to a refund equal to the amount of ten dollars (\$10) for each personal exemption for which a deduction is permitted. (House Bill No. 789)

Illinois

(1972) Exempted from the State income tax all income derived from "legitimate" pension programs.

New York

(1972) Required the State Tax Commission to provide by regulation for exemption from withholding personal income tax, for employees under 21, employees under 25, who are full-time students, and employees over 65, if they have no income tax liability in the prior year and can reasonably anticipate none for the current year. (Chapter 347-Amended Sec. 671, Tax Law)

Ohio

(1972) Granted special exemptions for the elderly against the new State Income Tax. The first \$4,000 of retirement income is exempt from taxation, and all persons over age 65 receive a \$25 tax credit against any tax due the State.

Arkansas

(1973) Exempted persons with incomes below \$5,000 from the State income tax.

(1973) Provided an income tax credit or a direct refund equal to a percentage of an individual's property tax payment to those persons whose gross income is less than \$5,500.

(7) Omnibus Tax Relief

Connecticut

(1972) Eliminated annual filing to obtain tax relief for the elderly; reduced the surviving spouse's age for qualification from 65 to 60 if otherwise qualified; restricted relief to qualifying husband and wife; and set a 5-year ownership requirement. (P.A. 253)

(8) Constitutional Amendments Initiated for Tax Relief

Missouri

(1972) Proposed a constitutional amendment authorizing the General Assembly to exempt from taxation household goods, part of the valuation of real property owned as a homestead by persons over the age of 65, who occupy rental property as their homes.

Tennessee

(1972) Authorized a constitutional amendment and the appropriate legislation for tax relief to the elderly. The amendment passed by popular vote in the August election, and Tennessee now has circuit breaker tax relief for the elderly.

Texas

(1972) Proposed amendment to allow political subdivision to exempt not less than \$3,000 of the value of the residence homesteads of all persons 65 years of age or older from all ad valorem taxes levied by the political subdivision.

Georgia

(1972) Proposed three constitutional amendments to reduce property taxes for Georgia's elderly:

- (1) H.R. 767-1805 proposed to exempt the home property of persons age 62 and over, whose family income is less than \$6,000 per annum, from all ad valorem taxes levied for educational purposes by independent school districts, cities or towns.
- (2) H.R. 768-1805 proposed to exempt the home property of those same persons from all ad valorem taxes levied for educational purposes by counties.
- (3) H.R. 169-492 proposed that Federal Old-Age, Survivor or Disability benefits no longer be counted as income for persons age 65 and over who wish to apply for the extra \$2,000 homestead exemption Georgia grants to older persons whose family income is less than \$4,000 per year. The total \$4,000 exemption would be automatically granted each ensuing year unless the home owner, once qualified, notifies the tax commissioner or tax receiver in the event he becomes ineligible.

(9) Emergency Tax Relief

New York

(1973) Amended the real property tax law so as to provide tax abatement or State assistance for those older persons who lost property in Hurricane Agnes. (A-2239)

h. Resolutions to Congress

Massachusetts

(1972) Various omnibus state resolutions urged Congress to overhaul Social Security laws as follows:

- (1) Increases in social security.
- (2) A cost of living plan to raise benefits at the same percentage pace as inflation.
- (3) A minimum monthly amount of \$150 for one person and \$250 for a married couple.
- (4) Benefit to be computed on the basis of the ten highest years of worker earnings.
- (5) Widow to receive 100% instead of 82-1/2% of her husband's retirement benefit.
- (6) Removal of the restriction on earnings which are now set at \$1,680.00.
- (7) Any future benefit increases shall not be considered as income by public housing authority in computing rents.

4. Health Care

State legislatures authorized a great deal of new State activity in the field of health care, particularly in efforts to provide better nursing home care, and expanding home care and home health services, where several new initiatives were undertaken. Other action involved the establishment of day care services for older persons, increased state financed medical benefits, attempts to facilitate benefit application procedures, and authorization to study the feasibility of establishing geriatric centers and the expansion of existing facilities.

a. Nursing Homes

(1) Patient benefits

Missouri

(1972) Benefits for indigent patients in practical nursing homes were increased to \$200 and to \$150 for domiciliary homes.

(2) Construction funds

Illinois

(1972) Authorized financial aid for the construction of non-profit institutions caring for the aged.

Maryland

(1972) Authorized the issuance of a state loan totaling \$1 million, the proceeds to be used for grants by the State Department of Health and Mental Hygiene to help finance the construction and equipment of county and municipal and other non-profit nursing homes in Maryland. Grants which supplement Federal allotments to the Department for this purpose must, when combined with the Federal funds, provide not more than 67 percent of the costs. Grants for State funds only must provide not more than 50 percent of the costs. (Chapter 119, Acts of 1972)

New York

(1972) Raised the aggregate principal amount the state housing finance agency can issue for hospital and nursing home project bonds and notes from \$2,950,000,000 to \$3,950,000,000, excluding hospital and nursing homes project bonds and notes issued to refund outstanding hospital and nursing home project bonds and notes. (Chapter 604-Amended Sec. 47, Private Housing Finance Law)

Kentucky

(1972) Added hospitals and facilities for the treatment or care of the aged or infirm to the facilities which may be financed by industrial building revenue bonds.

(3) Regulation

Ohio

(1972) Required installation in nursing homes of sprinkling systems and fire alarm systems, by January 1, 1975.

New York

(1972) Authorized private proprietary nursing homes with a capacity of 80 or more patients, to have a licensed medical doctor in attendance upon the premises for the care and treatment of patients. (Chapter 927-Adds Wec. 2805b to the Public Health Law)

(1972) Provided for biennial registration periods for nursing home administrators and funeral directors. (Chapter 176-Amended Sections 2896g,3428, Public Health Law)

(1972) Changed the definition of an intermediate care facility to mean certain described facilities approved by health departments to provide health-related care and services to certain eligible persons, if it meets the standards of safety and sanitation in accordance with state and federal requirements in addition to those applicable to nursing homes under state law, and fixed certain new provisions making the department responsible for furnishing medical assistance in an intermediate care facility. (Chapter 694-Amended Sections 2,138-a, 153, 210, 211, 285, 286, 302, 303, 365; 365, 368-a, Social Services Law)

(4) Feasibility Studies to Build New Homes

Maryland

(1972) Requested the Governor of Maryland the the Mayor of Baltimore to create a commission to study the feasibility of building a nursing home for the aged on the grounds of the Baltimore City Hospitals. (Jt. Res. No. 13)

(5) Operating Subsidies

Ohio

(1972) Increased State Department of Welfare per patient subsidy payments to nursing homes that indicate operating costs are higher than the present subsidy.

b. Home Health Care ProgramsMassachusetts

(1972) Passed the Home Care Service Program, with a \$200,000 State appropriation, which will enable a \$600,000 grant from the Federal government on a 75%-25% matching basis.

New York

(1972) Prohibited the establishment of home health agencies without written approval of the public health council and certificate of the state health commissioner after recommendations of state and regional hospital review and planning councils, and after public hearing, if requested; makes other provisions as to insuring for home care coverage in accident and sickness and hospitalization policies; every insurer insuring a policy which provides coverage for in-patient hospital care must make available and if requested by the contract holder provide reimbursement for home care.

Home care shall be provided only by a

- (i) hospital possessing a valid operating certificate to provide home health services or
- (ii) by a non-profit or public home health service or agency possessing a valid certificate of approval, and consist of, one or more of the following:
 - (i) hospital possessing a valid operating certificate and certificate to provide home health services or
 - (ii) home health aid services,
 - (iii) physical occupational or speech therapy provided by a home health service or agency, and
 - (iv) medical supplies, drugs and medications, and laboratory services by or on behalf of a hospital to the extent such items would have been provided under the contract if the covered person had remained in the hospital.

(Chapter 918-Amended Section 206, 2801, 2803, 2804, 2807, 2904, added 2801-c, 2804-9, 2806-9, Public Health Law; Amended Sections 162, 164, 221, 250, Insurance Law)

c. Day Care Centers for Older PersonsHawaii

(1972) Established Day Care Centers for the Aged in the State of Hawaii under the auspices of the Department of Social Services and Housing.

d. Expansion of State BenefitsCalifornia

(1972) Required health care services for dentures when removable prothesis are precluded. (AB 1457)

(1972) Included dental services within minimum coverage by Medi-Cal. (AB 759)

(1972) Included outpatient anesthesiologist services under Medi-Cal basic benefits. (S.B. 1169)

(1972) Required the State Department of Public Health to maintain a program to assure availability of medical and health care for the aging. Authorized the Department to contract with public or private organizations for conducting pilot projects designed to determine the most effective and efficient methods of providing medical and health care services for the aging. Required California Commission on Aging to be the coordinating agency to evaluate and further coordinate programs for out-patient medical services for the aging. (AB 1189)

e. Efforts to Facilitate Medical Assistance ApplicationsNew York

(1972) Provided that when an application for medical assistance is made by mail, a personal interview shall be conducted with the applicant or with the person who made the application in his or her behalf when the applicant cannot be interviewed due to physical or mental condition. (Chapter 532-Amended Sec. 366-a, Social Services Law)

f. Resolutions to CongressMassachusettsNational Health Insurance

(1972) The Massachusetts Legislature memorialized the Congress for a comprehensive health program for all Americans.

g. Feasibility Studies to Expand or Develop Health Care FacilitiesConnecticut

(1972) Provided the following: "The Departments of Health, Mental Health and Aging shall jointly conduct a study of the feasibility of establishing geriatric centers in the State and shall submit a report of their findings and recommendations to the 1973 session of the general assembly by January 31, 1973." (S.A. 5)

Massachusetts

(1972) Established procedures for the determination by the Department of Public Health of the need to expand certain health care facilities. (Chapter 776)

5. Nutrition

A number of State legislatures moved quickly to enable the utilization of Federal funds for the Nutrition Program for the Elderly. Some legislatures mandated State participation in the program and others authorized appropriations for the required matching funds for the program. Several States enacted legislation to provide facilities for nutrition programs for older persons.

a. Legislation to Implement the Title VII Nutrition Program for the ElderlyCalifornia

(1972) Required the State Commission on Aging to develop and submit the state plan to the Federal government to implement the Nutrition Program for the Elderly; authorized a private agency, or a public agency to submit proposals for funding under the Federal act. Also required that State, local governmental, and private agencies make a maximum contribution of their in-kind resources and facilities in order to implement the provisions of the Nutrition Program for the elderly, and appropriated \$400,000 to implement nutrition programs for the elderly when in-kind contributions are insufficient. (AB 1202)

Hawaii

(1972) Appropriated \$50,000 in supplemental funds to match \$500,000 of Federal funds to implement a statewide Nutrition Program for the Elderly.

Massachusetts

(1972) Increased appropriations for the hot lunch programs from \$150,000 to \$290,000 in preparation for the Federal Nutrition Appropriations measure, which will permit Massachusetts to receive \$2,900,000 for nutrition on a 90% Federal-10% State matching basis. (H-5555)

Kentucky

(1972) Permitted the State, or an agency designated by the Governor, to participate in any Federal program under the Older Americans Act or under any other Federal legislation which appropriates money to the States for the purpose of establishing programs to provide the elderly with low-cost, nutritionally sound meals served in strategically located centers such as community centers, senior citizen centers, schools, and other public or private non-profit institutions where the elderly can obtain other social and rehabilitative services.

b. Facilities for Nutrition ProgramIowa

(1972) Passed a school lunch facilities program authorization for senior citizens. This allows local school boards to either serve senior citizens at the school or provide facilities for meals for senior citizens.

New York

(1972) Provides that cafeterias and restaurants in various school districts may be used by a community for school related functions and activities and to furnish luncheon to elderly district residents meeting standards of age and low income established by the Commissioner, with utilization by such elderly or school-related groups subject to approval of education board; requires that charges be sufficient to bear the direct cost of the preparation and serving of meals, exclusive of other available reimbursement. (Chapter 772-Amended Sections 1604, 1709, 2503, 2554, 2590-e, Education Law)

(1972) Provided that cafeteria or restaurant service provided by the Board of Cooperative Educational Services, at the request of component districts, may be used by a community for school-related functions and to furnish meals to elderly residents of district 65 years or older meeting standards of low income established by the Commissioner, with such utilization subject to the approval of the Education Board, and with charges to be sufficient to bear the direct cost of preparation and serving of meals. (Chapter 770-Amended Sec. 1958, Education Law)

6. Transportation

The growing awareness of the transportation problem faced by all Americans, but especially older persons, is clear in the vigorous State legislative responses to these needs. Several States have instituted reduced fare systems for the elderly, and one has initiated a free-fare system for older persons State-wide. Legislatures also authorized the use of school buses and minibuses to transport older persons, and one State has granted older persons special privileges to use smaller vehicles on sidewalks. Some States acted to ensure that older persons would not be discriminated against in auto licensing and insurance procedures.

a. Reduced and Free Fare SystemsPennsylvania

(1972) Enacted legislation providing for "free mass transportation" for persons age 65 and over. The program will be financed out of proceeds from the Pennsylvania State Lottery.

Texas

(1972) Authorized municipal transportation companies to set special rates for persons who are over the age of 65 or who are blind or disabled. (H.B. No. 600)

Rhode Island

(1972) Subsidized public transportation to allow the continuation of reduced fares for older persons.

Delaware

(1972) Provided funds for reduced fares (35¢ to 15¢) for senior citizens in New Castle County (included Wilmington).

b. Use of School and MinibusesSouth Dakota

(1972) Authorized the use of school buses to transport older persons within a radius of 75 miles when buses are not being used for school purposes.

Delaware

(1972) Appropriated monies for 9 minibuses to transport older persons to and from Senior Centers.

c. Special Vehicle PermitsNebraska

(1973) Exempted from motor-carrier regulations vehicles serving the elderly operated by non-profit organizations.

California

(1972) Authorized local authorities to allow the operation of bicycles and electric carts on public sidewalks for the disabled and persons 62 years of age and older. (AB 2096)

d. Age Discrimination LawsMassachusetts

(1972) Regulated further the issuance of driver's licenses by the Department of Public Utilities to persons over 70 years of age. Older Americans who attain the age of 70 and are driving public transportation can now continue to operate a bus or livery car if they take two physical examinations a year and are found to be in good health. (Chapter 197)

Maryland

(1972) Prohibited any cancellation or non-renewal of a motor vehicle insurance policy or contract or increase in the premium therefor exclusively for the reason of age beyond 65 years of an insured person under the policy or contract. (S.B. No. 203-Chapter 394, Acts of 1972)

7. Housing

State legislatures took a number of approaches in efforts to assist older persons obtain adequate housing. Several States increased mortgage loan funds that older persons could use to purchase homes. However, most of the recent action has focused on public housing. New State funded housing projects have been authorized for older persons, codes and regulations have been strengthened, preference for occupancy has been granted to older persons in public housing projects, and studies have been initiated to determine the feasibility of constructing special housing for the elderly. In other action, older renters have been protected from rent increases, welfare boards have been authorized to house older persons in private proprietary homes, and certain housing cooperatives and homes for older persons have been granted exemption from some types of State housing fees.

a. Construction of ProjectsDelaware

(1972) Authorized funding for 24 units (single) for older people and a senior center for 250 people at "Holly Square" in Middletown (about 30 miles out of Wilmington).

b. Increase Mortgage Loan FundsMaryland

(1972) Created a Division of Home Financing in the Maryland Department of Economic and Community Development, with the power and authority to make mortgage loans to disadvantaged and low-income citizens of Maryland for the purchase of a home. The citizen must have been unable to secure a mortgage from a private lending institution at existing private lending rates. The loan must bear the interest rate which the State pays for the bonds issued to obtain the funds, plus interest necessary to make the program self-supporting. The Division must carry out policies "to avoid creating or aggravating low-income concentrations which adversely affect communities", and must make apportionments of funds to insure that all area of the state are served. (Chapter 635, Acts of 1972)

(1972) Authorized the issuance of \$10 million in State bonds, "the proceeds to be used to provide mortgage money for disadvantaged and low-income citizens of Maryland." (Chapter 634, Acts of 1972)

c. Codes and RegulationsNew Mexico

(1972) Required boarding homes for older people to be licensed. The Health & Social Services Department was established as the licensing agent responsible for inspection and certification and funds were appropriated to enable the Department to carry out these functions.

New York

(1972) Required that all public buildings and facilities conform to the state building construction code relating to facilities for the physically handicapped, except those buildings already constructed, in the process of construction or for which schematic designs have already been approved. (Chapter 656-Added Art. 4-A renumbered Arts. 14, 4, 95, 5, 6, Public Buildings Law: Amended 3740a, Executive Law)

Missouri

(1972) Required licensing for boarding homes for the aged caring for three or more persons.

d. Housing Occupancy PreferenceNew York

(1972) Required that preference in admission to any limited-profit housing company project specifically designed for occupancy by aged persons, be given to such persons. (Chapter 410-Amended Sec. 31, Private Housing Finance Law)

(1972) Extended provisions requiring that preference in admission to a limited-profit housing project specifically designed for occupancy by older persons be given to such persons, to include a portion of any such project so designed, and to include also projects or portions designed for occupancy by handicapped persons. (Chapter 760-Amended Sec. 31, Private Housing Finance Law)

e. Study of Special HousingMassachusetts

(1972) Increased the scope of the Special Commission established to investigate and study the feasibility of providing special type housing for the elderly.

f. Housing AllowancesNew York

(1972) Provided for including the full amount of any shelter allowance in one of semi-monthly grants and allowances made to an employable recipient of public assistance. (Chapter 685-Amended Sec. 131, Social Services Law).

g. Rent ProtectionNew York

(1972) Authorized municipalities (for enabling lower income elderly persons to continue in the occupancy of limited-profit or limited divided housing companies without paying rentals in excess of a fair proportion of their income) to contract to make periodic payments to a housing company in an amount not exceeding the difference between the rent or carrying charges for dwellings occupied by lower income elderly persons, and 1/3 of their not probable aggregate annual income, where such rent or charges exceed such 1/3, subject to certain limitations; makes similar provisions with respect to reduced rentals for elderly in the occupancy of redevelopment companies and housing development fund companies fixed qualifications. (Chapter 870-Amended Sections

New York (continued)

31, 85-a; added Sections 126, 577-a, Private Housing Finance Law)

(1972) Authorized the governing body of a city, town or village to provide for the abatement of taxes imposed by it on real property containing dwelling units in which the head-of-household resides and which is subject to emergency housing rent control law of the New York City rent and rehabilitation law, if the person is 62 or over and not the recipient of public assistance. Such abatement, however, can not be in excess of portion of increase in maximum rent which causes maximum rent to exceed 1/3 of combined income of all members of household. Also made other provisions concerning the maximum combined income of members of family. The Act, effective May 30, 1972, was made retroactive to January 1, 1972. (Chapter 689-Added Sec. 467-b, Real Property Tax Law)

h. Use of Private Proprietary Homes

New York

(1972) Allows a member of a social welfare board to approve private proprietary homes for adults and residences for adults, when designated by such a board to approve such homes, and also allows such a member to define resident for adults. (Chapter 395-Amended Sec. 748, Executive Law)

i. Special Exemption from Housing Fees or Taxes

New Jersey

(1972) Exempted cooperative ownerships and senior citizen developments from payment of certification and inspection fees required by the States multiple dwelling law. (Assembly No. 34) However, this bill was vetoed.

Kansas

(1972) Authorized that the eligible voters of a county may deny by petition a tax levy placed on a county home for older persons. (Senate Bill 480, Chapter 80)

8. Leisure Activities

State legislatures have developed increasing awareness about the leisure-time needs of older persons, with the result that several States acted to increase recreation activities and opportunities for older persons. Others enacted legislation expanding volunteer opportunities for older persons, and adult education programs were given attention in a few states.

a. RecreationKansas

(1972) Allowed county government to provide funds to match federal funds for recreation programs for the elderly. (Senate Bill #608)

Idaho

(1972) Provided that recreation facilities include activities for older persons. (Amended Sec. 31-4302, Idaho Code)

(1972) Provided that one of the purposes of a recreation district may be to establish a fund to promote, establish and maintain recreational and other activities for the elderly. (Amended Sec. 31-4316, Idaho Code)

Nebraska

(1972) Provided free hunting and fishing licenses for those aged 65 and above.

New York

(1972) Created in the executive department of the state office aging a recreation council for the elderly consisting of 5 members appointed by the director, to promulgate and make effective, with the director's approval, regulations with respect to the furnishing of recreation for adults 60 years of age and over. Made other relative provisions including the powers of municipalities with respect to recreation for the elderly, adult recreation projects, and state aid and grants. (Chapters 679-Added Sections 541-546, Executive Law; Repeated Art. 24, Education Law)

California

(1972) Required the Department of Fish and Game to issue a renewable sport fishing license to any person 62 years of age or older who has been a resident of California for five years immediately preceding and whose total income does not exceed \$140 per month. (AB 2169)

New Jersey

(1972) Authorized a constitutional amendment allowing senior citizen associations or clubs to sponsor games of chance and award prizes. (Resolution 86)

b. Home Health Care ProgramsMassachusetts

(1972) Passed the Home Care Service Program, with a \$200,000 State appropriation, which will enable a \$600,000 grant from the Federal government on a 75%-25% matching basis.

New York

(1972) Prohibited the establishment of home health agencies without written approval of the public health council and certificate of the state health commissioner after recommendations of state and regional hospital review and planning councils, and after public hearing, if requested; makes other provisions as to insuring for home care coverage in accident and sickness and hospitalization policies; every insurer insuring a policy which provides coverage for in-patient hospital care must make available and if requested by the contract holder provide reimbursement for home care.

Home care shall be provided only by a

- (i) hospital possessing a valid operating certificate to provide home health services or
- (ii) by a non-profit or public home health service or agency possessing a valid certificate of approval, and consist of, one or more of the following:
 - (i) hospital possessing a valid operating certificate and certificate to provide home health services or
 - (ii) home health aid services,
 - (iii) physical occupational or speech therapy provided by a home health service or agency, and
 - (iv) medical supplies, drugs and medications, and laboratory services by or on behalf of a hospital to the extent such items would have been provided under the contract if the covered person had remained in the hospital.

(Chapter 918-Amended Section 206, 2801, 2803, 2804, 2807, 2904, added 2801-c, 2804-9, 2806-9, Public Health Law; Amended Sections 162, 164, 221, 250, Insurance Law)

c. Day Care Centers for Older PersonsHawaii

(1972) Established Day Care Centers for the Aged in the State of Hawaii under the auspices of the Department of Social Services and Housing.

d. Expansion of State BenefitsCalifornia

(1972) Required health care services for dentures when removable prothesis are precluded. (AB 1457)

(1972) Included dental services within minimum coverage by Medi-Cal. (AB 759)

(1972) Included outpatient anesthesiologist services under Medi-Cal basic benefits. (S.B. 1169)

(1972) Required the State Department of Public Health to maintain a program to assure availability of medical and health care for the aging. Authorized the Department to contract with public or private organizations for conducting pilot projects designed to determine the most effective and efficient methods of providing medical and health care services for the aging. Required California Commission on Aging to be the coordinating agency to evaluate and further coordinate programs for out-patient medical services for the aging. (AB 1189)

e. Efforts to Facilitate Medical Assistance ApplicationsNew York

(1972) Provided that when an application for medical assistance is made by mail, a personal interview shall be conducted with the applicant or with the person who made the application in his or her behalf when the applicant cannot be interviewed due to physical or mental condition. (Chapter 532-Amended Sec. 366-a, Social Services Law)

f. Resolutions to CongressMassachusettsNational Health Insurance

(1972) The Massachusetts Legislature memorialized the Congress for a comprehensive health program for all Americans.

g. Feasibility Studies to Expand or Develop Health Care FacilitiesConnecticut

(1972) Provided the following: "The Departments of Health, Mental Health and Aging shall jointly conduct a study of the feasibility of establishing geriatric centers in the State and shall submit a report of their findings and recommendations to the 1973 session of the general assembly by January 31, 1973." (S.A. 5)

Massachusetts

(1972) Established procedures for the determination by the Department of Public Health of the need to expand certain health care facilities. (Chapter 776)

5. Nutrition

A number of State legislatures moved quickly to enable the utilization of Federal funds for the Nutrition Program for the Elderly. Some legislatures mandated State participation in the program and others authorized appropriations for the required matching funds for the program. Several States enacted legislation to provide facilities for nutrition programs for older persons.

a. Legislation to Implement the Title VII Nutrition Program for the ElderlyCalifornia

(1972) Required the State Commission on Aging to develop and submit the state plan to the Federal government to implement the Nutrition Program for the Elderly; authorized a private agency, or a public agency to submit proposals for funding under the Federal act. Also required that State, local governmental, and private agencies make a maximum contribution of their in-kind resources and facilities in order to implement the provisions of the Nutrition Program for the elderly, and appropriated \$400,000 to implement nutrition programs for the elderly when in-kind contributions are insufficient. (AB 1202)

Hawaii

(1972) Appropriated \$50,000 in supplemental funds to match \$500,000 of Federal funds to implement a statewide Nutrition Program for the Elderly.

Massachusetts

(1972) Increased appropriations for the hot lunch programs from \$150,000 to \$290,000 in preparation for the Federal Nutrition Appropriations measure, which will permit Massachusetts to receive \$2,900,000 for nutrition on a 90% Federal-10% State matching basis. (H-5555)

Kentucky

(1972) Permitted the State, or an agency designated by the Governor, to participate in any Federal program under the Older Americans Act or under any other Federal legislation which appropriates money to the States for the purpose of establishing programs to provide the elderly with low-cost, nutritionally sound meals served in strategically located centers such as community centers, senior citizen centers, schools, and other public or private non-profit institutions where the elderly can obtain other social and rehabilitative services.

b. Facilities for Nutrition ProgramIowa

(1972) Passed a school lunch facilities program authorization for senior citizens. This allows local school boards to either serve senior citizens at the school or provide facilities for meals for senior citizens.

New York

(1972) Provides that cafeterias and restaurants in various school districts may be used by a community for school related functions and activities and to furnish luncheon to elderly district residents meeting standards of age and low income established by the Commissioner, with utilization by such elderly or school-related groups subject to approval of education board; requires that charges be sufficient to bear the direct cost of the preparation and serving of meals, exclusive of other available reimbursement. (Chapter 772-Amended Sections 1604, 1709, 2503, 2554, 2590-e, Education Law)

(1972) Provided that cafeteria or restaurant service provided by the Board of Cooperative Educational Services, at the request of component districts, may be used by a community for school-related functions and to furnish meals to elderly residents of district 65 years or older meeting standards of low income established by the Commissioner, with such utilization subject to the approval of the Education Board, and with charges to be sufficient to bear the direct cost of preparation and serving of meals. (Chapter 770-Amended Sec. 1958, Education Law)

6. Transportation

The growing awareness of the transportation problem faced by all Americans, but especially older persons, is clear in the vigorous State legislative responses to these needs. Several States have instituted reduced fare systems for the elderly, and one has initiated a free-fare system for older persons State-wide. Legislatures also authorized the use of school buses and minibuses to transport older persons, and one State has granted older persons special privileges to use smaller vehicles on sidewalks. Some States acted to ensure that older persons would not be discriminated against in auto licensing and insurance procedures.

a. Reduced and Free Fare SystemsPennsylvania

(1972) Enacted legislation providing for "free mass transportation" for persons age 65 and over. The program will be financed out of proceeds from the Pennsylvania State Lottery.

Texas

(1972) Authorized municipal transportation companies to set special rates for persons who are over the age of 65 or who are blind or disabled. (H.B. No. 600)

Rhode Island

(1972) Subsidized public transportation to allow the continuation of reduced fares for older persons.

Delaware

(1972) Provided funds for reduced fares (35¢ to 15¢) for senior citizens in New Castle County (included Wilmington).

b. Use of School and MinibusesSouth Dakota

(1972) Authorized the use of school buses to transport older persons within a radius of 75 miles when buses are not being used for school purposes.

Delaware

(1972) Appropriated monies for 9 minibuses to transport older persons to and from Senior Centers.

c. Special Vehicle PermitsNebraska

(1973) Exempted from motor-carrier regulations vehicles serving the elderly operated by non-profit organizations.

California

(1972) Authorized local authorities to allow the operation of bicycles and electric carts on public sidewalks for the disabled and persons 62 years of age and older. (AB 2096)

d. Age Discrimination LawsMassachusetts

(1972) Regulated further the issuance of driver's licenses by the Department of Public Utilities to persons over 70 years of age. Older Americans who attain the age of 70 and are driving public transportation can now continue to operate a bus or livery car if they take two physical examinations a year and are found to be in good health. (Chapter 197)

Maryland

(1972) Prohibited any cancellation or non-renewal of a motor vehicle insurance policy or contract or increase in the premium therefor exclusively for the reason of age beyond 65 years of an insured person under the policy or contract. (S.B. No. 203-Chapter 394, Acts of 1972)

7. Housing

State legislatures took a number of approaches in efforts to assist older persons obtain adequate housing. Several States increased mortgage loan funds that older persons could use to purchase homes. However, most of the recent action has focused on public housing. New State funded housing projects have been authorized for older persons, codes and regulations have been strengthened, preference for occupancy has been granted to older persons in public housing projects, and studies have been initiated to determine the feasibility of constructing special housing for the elderly. In other action, older renters have been protected from rent increases, welfare boards have been authorized to house older persons in private proprietary homes, and certain housing cooperatives and homes for older persons have been granted exemption from some types of State housing fees.

a. Construction of ProjectsDelaware

(1972) Authorized funding for 24 units (single) for older people and a senior center for 250 people at "Holly Square" in Middletown (about 30 miles out of Wilmington).

b. Increase Mortgage Loan FundsMaryland

(1972) Created a Division of Home Financing in the Maryland Department of Economic and Community Development, with the power and authority to make mortgage loans to disadvantaged and low-income citizens of Maryland for the purchase of a home. The citizen must have been unable to secure a mortgage from a private lending institution at existing private lending rates. The loan must bear the interest rate which the State pays for the bonds issued to obtain the funds, plus interest necessary to make the program self-supporting. The Division must carry out policies "to avoid creating or aggravating low-income concentrations which adversely affect communities", and must make apportionments of funds to insure that all area of the state are served. (Chapter 635, Acts of 1972)

(1972) Authorized the issuance of \$10 million in State bonds, "the proceeds to be used to provide mortgage money for disadvantaged and low-income citizens of Maryland." (Chapter 634, Acts of 1972)

c. Codes and RegulationsNew Mexico

(1972) Required boarding homes for older people to be licensed. The Health & Social Services Department was established as the licensing agent responsible for inspection and certification and funds were appropriated to enable the Department to carry out these functions.

New York

(1972) Required that all public buildings and facilities conform to the state building construction code relating to facilities for the physically handicapped, except those buildings already constructed, in the process of construction or for which schematic designs have already been approved. (Chapter 656-Added Art. 4-A renumbered Arts. 14, 4, 95, 5, 6, Public Buildings Law: Amended 3740a, Executive Law)

Missouri

(1972) Required licensing for boarding homes for the aged caring for three or more persons.

d. Housing Occupancy PreferenceNew York

(1972) Required that preference in admission to any limited-profit housing company project specifically designed for occupancy by aged persons, be given to such persons. (Chapter 410-Amended Sec. 31, Private Housing Finance Law)

(1972) Extended provisions requiring that preference in admission to a limited-profit housing project specifically designed for occupancy by older persons be given to such persons, to include a portion of any such project so designed, and to include also projects or portions designed for occupancy by handicapped persons. (Chapter 760-Amended Sec. 31, Private Housing Finance Law)

e. Study of Special HousingMassachusetts

(1972) Increased the scope of the Special Commission established to investigate and study the feasibility of providing special type housing for the elderly.

f. Housing AllowancesNew York

(1972) Provided for including the full amount of any shelter allowance in one of semi-monthly grants and allowances made to an employable recipient of public assistance. (Chapter 685-Amended Sec. 131, Social Services Law).

g. Rent ProtectionNew York

(1972) Authorized municipalities (for enabling lower income elderly persons to continue in the occupancy of limited-profit or limited divided housing companies without paying rentals in excess of a fair proportion of their income) to contract to make periodic payments to a housing company in an amount not exceeding the difference between the rent or carrying charges for dwellings occupied by lower income elderly persons, and 1/3 of their not probable aggregate annual income, where such rent or charges exceed such 1/3, subject to certain limitations; makes similar provisions with respect to reduced rentals for elderly in the occupancy of redevelopment companies and housing development fund companies fixed qualifications. (Chapter 870-Amended Sections

b. Volunteer ProgramsCalifornia

(1972) Established Green Light and Green Thumb Programs for the benefit of senior rural Californians. The state is required to provide in-kind materials. (AB 1061)

Idaho

(1972) Provided that no law of the State should prohibit any State government agency, department or unit from accepting volunteers, and that any agency, department or unit may reimburse volunteers for reasonable and necessary expenses. Providing that civil service law and requirements do not apply to volunteers, and providing that requirements for volunteers are limited to requirements set by federal statute and to requirements set by the agency, department or unit of State government. (House Bill No. 660)

c. Adult EducationCalifornia

(1972) Required the California Higher Education Resources Council to confer on existing education programs for the aging and to report the findings and recommendations to the legislature. (ACR 127)

(1972) Delineated responsibilities and functions of adult education through the Superintendent of Public Instruction and the Chancellor of California Community Colleges. (AB 94)

9. Consumer Protection

The growing interest in consumer protection has led to specific concern about the problems older persons face in the marketplace. In response to this concern, State legislators have passed new, vigorous laws designed to protect older consumers. Several States acted to require greater control of prescription drug sales and information concerning them. Two States moved to license persons who dispense hearing aids. States also enacted legislation requiring written contracts in the sale of cemetery plots, full financial disclosure on the part of developers of retirement homes and properties, and the right of the survivor to break a lease within thirty days if a spouse dies. Two States also took action to ensure that older persons who did not have drivers licenses would have personal identification cards, thereby assuring an older person's ability to cash checks or buy on credit when such identification was required.

a. Prescription DrugsMaryland

(1972) Amended the State law which declared it to be grossly unprofessional conduct for a pharmacist or assistant pharmacist to advertise the prices of prescription drugs. The amended law provides that the dissemination of information by a pharmacist, directly or indirectly, through any State sponsored agency or any group recognized by the Maryland Commission on Aging, of special pricing and/or services, without identifying individual prescription drug items, to residents of the State of Maryland who have attained 60 years of age, shall not constitute "unprofessional conduct" within the meaning of the law. (Chapter 393, Acts of 1972)

Connecticut

(1972) Required persons authorized to prescribe drugs to include both brand and generic name. If a patient is over 65, a notation to that effect must be included on the prescription. Declared as public policy that generic drugs be prescribed wherever feasible. (P.A. 15)

b. Licensing Hearing Aid DispensersNew Jersey

(1972) Provided for the licensing of hearing aid dispensers by the State Board of Medical Examiners, creating a Hearing Aid Dispenser Examining Committee, and providing penalties for violations. (Assembly 255)

Connecticut

(1972) Established an Advisory Council on Hearing Aids to the State Health Department. The act requires that after January 1, 1973 all hearing aid dealers in Connecticut be licensed with the State Health Department and that the license be posted conspicuously in the dealer's office or place of business. (P.A. 295)

c. Identification CardsTexas

(1972) Authorized the Department of Public Safety to issue identification certificates to all persons requesting them, but it is intended primarily for persons who cannot obtain driver's licenses and who still need an approved form of identification. (S.B. No. 194, Sec. 14A)

Maryland

(1972) Required the Motor Vehicle Administration, on request of a person who does not possess a driver's license, to issue the person a special identification card which shall be accepted as valid identification of the person to whom it was issued. For a person aged 65 and over, no fee shall be charged for such a card. The cards shall expire every two years but may be renewed. (Chapter 683, Acts of 1972)

d. MiscellaneousNew York

(1972) Required that a written contract for the sale or use of a cemetery lot or plot shall have attached to it a copy of the rules and regulations as to the size and placement of monuments, restrictions on plot usage, warranties, obligations of corporation and financial obligations and duties of the lot owner, with the copy to be delivered if sold without a written contract. (Chapter 960-Amended Sec. 1401, Not-for-Profit, Corporation Law)

Nebraska

(1972) Required a full financial disclosure on the part of the developers of retirement homes and properties.

Delaware

(1972) Authorized that if a spouse dies, the survivor can break a lease within 30 days.

10. Pending 1973 Legislation

As noted in the introduction, many State legislatures had not completed their 1973 sessions when they were requested to report final legislation. Their responses indicated a significant amount of legislation that could assist older persons was pending, however. While not law, this pending legislation suggests that State legislators have maintained a major concern for the welfare of the elderly, and that the State legislative action taken in 1972 after the White House Conference on Aging will be supplemented by more activity in the months to come.

As in 1972, a large portion of the legislation under consideration in 1973 concerns tax relief. Iowa, Virginia, Pennsylvania, South Carolina, Georgia and Oregon are each considering means of easing the burden of property taxes on older persons, especially those with low incomes. Several States also have pending bills that would lower the State income taxes and/or liabilities older persons face. These States include New Mexico, Louisiana and Massachusetts.

The transportation needs of the elderly continue to receive attention. Pennsylvania is considering the use of transportation stamps; Ohio has under review a proposal to utilize revenue sharing funds to subsidize bus companies providing reduced fare transit to older persons; and Massachusetts is discussing reducing fares below present reduced fares. Oregon, Iowa, and Kansas have been presented with proposals to provide for the utilization of school buses to transport the elderly.

Vermont has pending legislation that would provide I.D. cards to older State residents in order to facilitate the use of supportive services by the elderly.

Pennsylvania, in an effort to open educational opportunities to older persons, is considering a bill that would waive tuition fees in State-funded educational institutions for older persons.

South Carolina and Pennsylvania both are discussing legislation designed to lower the cost of prescription drugs to older persons, and thereby assist them in meeting medical expenses.

In an attempt to increase older persons mobility and access, Oregon legislators have proposed requirements that new and existing public buildings comply with standards for the elimination of architectural barriers to the use of such buildings by aged, disabled or handicapped persons.

Finally, both Massachusetts and South Carolina are discussing bills that would provide free or reduced admissions to older persons for the use of State public recreation facilities.

STATE ACTION SINCE THE
WHITE HOUSE CONFERENCE:
Section 2:
STATE ADMINISTRATIVE AGENCIES

TABLE OF CONTENTS
TO SECTION 2

	<u>Page</u>
Education	489
Employment and Retirement.....	496
Facilities, Programs & Services	501
Government & Non-Government Organizations	513
Housing	520
Income	526
Nutrition	532
Physical and Mental Health	538
Planning	543
Research	551
Retirement Roles and Activities	555
Spiritual Well-Being	561
Training	567
Transportation	574

[NOTE: The summaries and the tables that follow in Section 2 were prepared as a result of information collected through a survey, conducted in 1972, in which questionnaires were sent to each State to learn of State action regarding Conference recommendation implementation. Responses were received from State agencies on aging and from individual agencies with generic responsibility over the particular Section's general subject matter.

Results were mixed, as can be discerned from a review of the tables, but they also provide a general indication as to the types, extent and variety of actions being taken by State government units.]

ACTION BY STATE GOVERNMENT UNITS

EDUCATION

In the field of education, the distribution of responsibility and action is very different from the other broad areas in which Delegates made recommendations. State governments, through legislative and executive functions, have the key roles in public education policy despite the fact that implementation and much of the fiscal responsibility ultimately lies at the local level. The State authority is exercised through a statewide administrative agency and through a system of state grants to local school districts. Thus, State education agencies are instruments of major importance in establishing priorities and providing program support. Consequently, the views of State agencies have an importance in the field of education frequently not found in other areas such as income maintenance or housing where national or local policy making may be paramount.

It is not surprising, therefore, that recommendations made by the education section drew the greatest response from the States with a total of 38 responses to the recommendations of the Section.

Eighteen responses came from public education agencies -- the organizations directly responsible for many of the actions recommended by the Conference. These responses alone represent nearly 40 percent of the States and thus provide a reasonably broad picture of State reaction to elderly education needs.

In addition, there were responses from 14 higher education organizations. These respondents were either State governing bodies or individual universities. State agencies for the aging provided an additional six responses.

Educational Opportunities

A major recommendation of the Section was to give higher priority to adult education programs with attention being given to experimental and innovative programs. This proposal drew significant response with state public education agencies taking or contemplating action primarily within the Adult Basic Education (ABE) programs. Much of the focus thus is on providing education

programs equivalent to certain grade levels of school or equivalent to a high school diploma. With this focus, which generally aims at upgrading basic education skills needed for employment, it was not possible to sort out programs of specific benefit to the elderly although a number of States reported they were actively recruiting older persons into its ABE programs.

In some specific actions, the Maryland State Department of Education said it conducts a two week training program at St. Elizabeth's hospital to orient and familiarize counselors and hospital staff to work with the mentally ill and the elderly deaf. At the level of higher education, the University of Nevada reported that it gives instructions in taxes, trusts and wills at Senior Citizen Centers. It also conducts training classes in consumer education and physical fitness. The program is jointly funded by the Federal and State governments. The University of Nebraska School of Public Affairs says it will be developing educational programs for older persons in the near future. In addition to these program actions, several education and aging agencies said they have taken advocacy action (legislative support of public information activities primarily) to support conference goals.

The ABE program was also the primary vehicle reported for action being taken on the recommendation concerning educational opportunities for more successful adjustments to aging.

The Conference also showed concern over educational delivery systems, urging a mix of integrated or separated programs with other groups depending on specific needs and desires and providing outreach services for those who, by circumstances, are less likely to respond voluntarily. There were many reports of positive action on these. Again, many of those activities were within the framework of ABE programs. The Connecticut Department of Education said it has classes designed specially for the elderly. The Texas Education Agency's ABE program includes the use of older volunteers as teachers while New York uses young people as volunteers to work with the elderly. The New Hampshire Office of ABE said it was putting new emphasis on personalized instruction to meet special needs of the elderly and other clients. To make sure the instruction is effective, the office conducts workshops to "retool" teachers to techniques for individualized instruction.

One area of education drawing attention is the provision of educational outreach services. A number of States reported active outreach programs to assist the elderly and other age groups as part of their ABE activities. Connecticut, through the Bureau of Compensatory and Community Educational Services, has established

Neighborhood Learning Centers to bring its programs to persons at the neighborhood level. In New Hampshire, several ABE centers have employed outreach aides to organize and teach life-coping skills to groups of disadvantaged adults. These classes are conducted in the homes of persons in lower socio-economic neighborhoods. Maryland also operates a significant outreach program for low income persons in the city of Baltimore. These classes focus on preparing a person for State employment. The State education department also conducts training programs in counselor education and remedial education. The New York State Office for the Aging reported funding a Senior Community Outreach Program for the elderly with a focus on locating the elderly and providing services to them. The University of Hawaii provides instruction to persons preparing for work as outreach aides. The University has also conducted classes for older persons in nutrition. In Nevada, the University has initiated post-retirement programs set up in the county library and it operates mobile services for the elderly.

Educational Programs

It was noted above that States responded quite positively to the recommendations concerning educational opportunities. These opportunities are being made primarily through ABE programs which cover a wide range of population groups and educational needs. On recommendations for more specific types of programs, the responses were more mixed.

Of considerable interest to the Conference was the matter of pre-retirement education. Action was reported being taken by a variety of organizations including public education agencies, higher education institutions, and State Units on aging. The agencies for the aging, the most active group, have taken action in a variety of ways with the tendency to work through other organizations such as the local Rotary Club or providing information to private businesses. This pattern was in accord with the type of activities reported in other areas of need. That is, agencies for the aging tend to be advocacy organizations with few program operation responsibilities. In one case (the Connecticut Department of Aging) it was reported that statewide training programs in pre-retirement education would be conducted.

At the program level the Maryland Department of Education said it was training persons to conduct pre-retirement seminars, and some pre-retirement programs were being conducted through ABE and Model Cities programs. The Michigan Department of Education also reported that it was assisting pre-retirement programs through community education and ABE programs. New York encourages the public schools to offer such courses in cooperation with community organizations, industry and labor while the State of Washington said it has initiated special classes. (See "Pre-Retirement Education" in State Agency Report on Employment and Retirement.)

The Conference also urged establishment of a national awareness campaign regarding the aging process and needs of the aged. The New York State Office for the Aging reported considerable media activity--approximately 70 radio appearances, 60 TV appearances, 500 speeches and 22 published articles by delegates to the White House Conference. Other States reporting indicated similar types of activity but with less intensity.

Special Linguistic and Cultural Needs

The Education Section, perceiving the special needs of persons with linguistic and/or cultural differences, recommended that special attention be given to (1) use of the indigenous population in program design and; (2) preparation of bilingual instructional material for the non-English speaking to enable them to better understand and use government programs. On both recommendations, nearly half of the State agencies reported action with the public education agencies making a proportionately larger response on positive steps taken. New Hampshire, with a large French-Canadian population, reported that persons from these target populations are sought out and encouraged to serve on Local Advisory Committees at the Centers for Adult Basic Education. That State also reported that about one-third of the 700 ABE enrollments in 1971-72 were recent arrivals in the United States. Montana reports a similar approach on membership on advisory groups. Nevada has initiated a new service of giving the General Education Development test in Spanish. The University of Hawaii said all new service-related activities in its Gerontology Program use personnel from various ethnic/cultural groups.

Professional Personnel

A common recommendation from many Conference Sections was the need for training more persons to work with older persons. The Education Section made such a recommendation for institutions of higher learning for development of professionals.

The Arkansas Department of Higher Education said courses in gerontology have been started at the University of Arkansas at Little Rock, with Federal Support. The University of Nebraska provides graduate, undergraduate and short-term training programs. The Aging Studies Program at the University of South Florida has a graduate program leading to a Masters of Arts in Gerontology. Of particular significance, Aging Studies recently expanded into undergraduate education by offering a series of introductory courses at the junior year level. The University of Hawaii is studying ways to increase such professional preparation through its new University Gerontology Planning Committee. The Maryland Council for Higher Education said it would support such professional programs if they were proposed by the institutions for Council recommendation.

In conclusion: From the responses of the State agencies, it can be seen that significant activity is taking place at the State level to provide educational opportunities for the elderly. It should be noted, however, that many of these activities are taking place as part of the overall Adult Basic Education program and not programs designed specifically for older persons, which supports the concept of meeting the needs of the elderly by recognizing their special requirements within the framework of general area programs. The Conference has not recommended a separate system for elderly education and, in some cases, has made its proposals to cover other population groups.

The responses suggested that elderly educational needs presently appear to need additional program or administrative support necessary to achieve Conference goals but that interest is increasing. Therefore, it would seem that efforts to meet elderly educational goals at the State level are likely to be most effective if directed toward modification or expansion of ABE programs or alterations in ABE administrative structures.

RESULTS OF SURVEY ON ACTION BY STATE UNITS OF GOVERNMENT

EDUCATION

RECOMMENDATION NO.		ADVOCACY			FUNDING	TRAINING	SUPPORTED LEGISLATION			INITIATED NEW SERVICES	DISSEMINATED INFO TO:		RESEARCH
		TESTIMONY	MEDIA	LITIGATION			FED.	STATE	LOCAL		GOV'T.	MEDIA	
I.	Involve Linguistically/Culturally Expertise in Programs for Linguistically/Culturally Different Groups.	4	3		6	8	4	4	1	5	4	6	2
II.	Provide Funds for Bilingual/Bicultural Education	2	4		9	9	7	4	2	4	5	9	2
III.	Educational Alternatives Must Be Provided to Meet Special Need of the Elderly	6	5	1	9	7	5	5	3	3	5	8	4
IV.	Assign High Priority to Successful Demonstration Projects in Lieu of New Experimental Projects	7	5	1	12	8	5	5	3	7	8	9	6
V.	Use Outreach Programs to Involve Elderly Who Need Education the Most	7	5		9	4	4	5	3	6	4	12	2
VI.	Institutions Must Provide Incentives for Elderly to Participate in Educational Activities	4	5		4	3	4	4	3	2	2	4	
VII.	Strengthen Public Libraries to Serve as Community Learning Resource	5	3		4		4	2	1	6		6	
VIII.	Amend Library and Services Construction Act to Provide Special Elderly Services	3	1			1	3	1	1		1	2	
IX.	Emphasize Education as a "Worthy" Use of Leisure	5	2		8	8	3	4		2	2	2	
X.	Funds/Manpower for Elderly Education in Service Programs	6	2	1	3	2	4	4	1	2	2	2	1
XI.	Education Must Convey Greater Concern for Aging Process	5	2	1	9	5	8	6	1	2	5	8	1
XII.	Increase Educational Funding in Direct Proportion to Aging Population	2	2		3	1	1	1	1	1	2	2	
XIII.	Education Programs Development Must Be Based on Needs and Interests of Elderly, and include Their Involvement	5	1	1	5	4	3	3	1	3	2	2	

- 10 -

XIV.	Federal Gov't. Must Give Higher Priority to Aging Education in Allocating Funds	1	1		1	1	1	1	1	1	1		
XV.	Compensate Life Long Contributions of Elderly in Lieu of "Matching" Funds for Educational Program Grants	2	1	1	1	1	2	2	1		2	2	
XVI.	Elderly Education Must Emphasize Political Awareness so Process is Better Understood	2	2		3	7	2	1	1	2	2	4	2
XVII.	Education Must Include Awareness of Aging Component at all Levels	1	1			1					1	1	
XVIII.	Use Media Campaign to Better Understand Aging Process	2	5	1	2	2	2	2	2	6	2	6	1
XIX.	Use all Available Resources for Education of and for Elderly	4	2		4	3	1	2	2	2	1	1	2
XX.	Expand Preretirement Counseling Programs in all Sectors	3	1		4	5	1	2	1	6	3	3	3
XXI.	Higher Education Institutions Must Provide Better Preparation to Those Working With Elderly	3	3		2	7		1	1	1	2	3	1
XXII.	A&A Must Have Increased Funding and Independent Status Within DHEW	4	1				1	1	1				
XXIII.A	Create Div. of Aging Within OE to Coordinate Programs in Existing Fed., State and Local Systems									1	1		
XXIII.B	Designate Full-Time Responsibility for Development of Programs in Education	1			2		1	1		1	2		3

ACTION BY STATE UNITS OF GOVERNMENT

EMPLOYMENT AND RETIREMENT

In response to the poll of State action on employment and retirement problems of the elderly, twenty-eight questionnaires were returned by twenty-four States with twenty-one coming from State Employment Security Commissions and seven from agencies charged with handling the affairs of the elderly. Four States -- Connecticut, Massachusetts, New York and Tennessee -- sent replies from both agencies.

In general, State action on the majority of the Section's seventeen proposals tended to support, either through the news media or by future legislation, efforts aimed at converting Conference goals into law. Efforts to enact the Conferences' recommendations on the local level were successful in nine specific areas:

Expanded Manpower Services

Eighteen State agencies responded to the Conference's call for accelerated manpower program efforts providing older workers with job recruitment, counseling, training and placement services. Massachusetts and Vermont said these services are already offered through local employment security offices while Kansas, Oklahoma, and Illinois are conducting in-house training sessions to prepare agency staff members to deal more effectively with the problems of older workers. Rhode Island is receiving aid under the Trade Expansion Act to counsel, train and place older workers who are jobless as a result of increased importation of foreign goods.

Age Discrimination

Many states reported that they actively promote the employment of older workers through such special programs as Older Worker Week or Month. Six States -- New York, Vermont, Illinois, Tennessee, Massachusetts and Rhode Island -- reported major efforts by their employment security agencies to strictly enforce anti-age discrimination laws. Vermont and Illinois reported that agency doors are closed to discriminating employers. At present, Montana, Oklahoma, Minnesota, Washington State, Vermont and Illinois train their employment security people in practical applications of anti-age discrimination legislation. In Arkansas, a State without such laws, progress has been made by the simple elimination of age requirements on employment forms.

Government-Sponsored Jobs

State and local action on the Conference recommendation that government provide jobs to older workers if all else fails

revealed that seven States are now involved in these and similar programs. Operation Main Street, Green Thumb and Community Service aides programs are newly organized operations which were reported as major actions used to meet the needs that broadly exist nationwide.

Retirement Criteria

Eleven of 28 responding agencies supported the proposal that a worker's desire, need and ability to work, rather than age, be used as retirement criteria. Florida reported breakthroughs in eliminating mandatory age requirements, and New Mexico's employment security commission noted it grants employees extensions beyond the State retirement age.

Pre-Mature Retirement Assistance & Pension Reform

In response to the Conference call for programs aiding workers forced into pre-mature retirement for any reason, most States support the idea of providing unemployment benefits until prematurely retired workers gain new jobs or full retirement.

Florida suggested that a more active nationwide program regarding this problem is warranted. Tennessee is providing retraining and placement services; Nevada has the Technology Mobilization Re-Employment Program; and Rhode Island says workers forced into retirement by imports are aided under the Trade Expansion Act. (See also "Educational Programs" in Section on "Education".)

Regarding pension reform, most States reported that action is needed at the Federal enforcement level.

Pre-Retirement Education

In answer to the recommendation calling for greater efforts in pre-retirement education, Oklahoma, Iowa, Illinois and Massachusetts Employment Security Commissions are conducting seminars in counseling, retraining and selective placement services available to older workers facing retirement. Minnesota is planning to provide this service in the future.

Job Banks

Florida, Texas, Oklahoma, Arkansas, Arizona, New York, Illinois and New Mexico operate Job Banks opened to older workers.

Special Programs

At present, Virginia and Arkansas have set up centers where unemployed older workers can meet potential employers. Kansas is seeking funds to provide this service.

Vermont raised the issue of professional ethics regarding the proposal to train older workers as companions to the elderly confined in private homes. It was felt that widespread support of such an effort would be a violation of the professional counseling ethics as provided by their agency. A number of States, however, are training the elderly to work in home-maker/home-aides service areas.

Conclusion

While action across the board has been varied, with regard to recommendations of the Employment and Retirement Section, it is reasonable to conclude that State efforts to date have been at the central issue of eliminating age as a barrier to employment and through the development of employment opportunities. Whereas public service programs, pension reforms, and special manpower and training programs will require strong Federal leadership and support, State level action in these areas indicate increased awareness and concern for older workers.

RESULTS OF SURVEY ON ACTION BY STATE UNITS OF GOVERNMENT
EMPLOYMENT AND RETIREMENT

RECOMMENDATION NO.	ADVOCACY			FUNDING	TRAINING	SUPPORTED LEGISLATION			INITIATED NEW SERVICES	DISSEMINATED INFO TO:		RESEARCH
	TESTIMONY	MEDIA	LITIGATION			FED.	STATE	LOCAL		GOV'T.	MEDIA	
I.A.	Increase Manpower Funds	3	3		1 2	1 2			2	4	8	
I.B.	Earmark Manpower Funds	2	1		1 1	2 2	1			1	1	
II.A.	Expand Employment Opportunities for Older Workers	2	3		1 5	2 6			1	6	9	
II.B.	Enforce Anti-Discriminatory Laws											
II.C.	Expand Discrimination Act of 1967 to Cover all Employees	1				1 3	1			1		
II.D.	Induce Employers Voluntarily to Hire More Older Workers	2	5			2 5	1		3	2	11	
III.	Expand Public Service Employment				3 1	2 1	1		2	1	2	
IV.	Establish Flexible Retirement Ages	1	3							1	3	
V.A.	Establish New National Policies and Programs for Workers who are Forced to Retire Early	2			1 2	1			2	1	3	
V.B.	Create Program to Maintain Economic Security During Transition from Disemployment to Employment or Retirement		1			1 1						
V.C.	Educate Disemployed to Assure Reemployment or Retirement	1			1	1 1						
V.D.	Guarantee Adequate Retirement Income						2					
VI.	Expand Preretirement Education	4	3		1 1	1 1			3	1	4	
VII.	Liberalize Earnings Test to Allow Earnings with Benefits to Total \$5000					2						
VIII.A.	25% Increase in Social Security Benefits					3						
VIII.B.	\$150 Minimum Per Month Financed Partly by General Revenues											

100

IX.A.	Creates Separate Federal Aging Agency												
IX.B.	Appointment of Person to Coordinate Programs for Aged												
X.	Establish National Pension Commission to Expand Pension Plans												
XI.	Computerize National "Job Bank" to Meet Employer Requirements	1	1	2	2	1	1	1	3	3	5	1	
XII.A.	Establish Local Centers to Promote Job Opportunities for Elderly Workers			1			1		3		1		
XII.B.	Funding for Programs Offering Companions for Elderly Living in Private Homes	1	1	1		1	1				1	1	
XIII.	Study to Alleviate Problems of Aged on the Mariana Islands												
XIV.	Enact Portable Pension Plan for Those Not Normally Covered						1						
XV.	Initiate Pre-Retirement Counseling Programs	1	1	1		1	1				2		
XVI.A.	Exempt Taxation of Employee Contributions to Retirement Funds												
XVI.B.	Increase Tax Incentives to Encourage Employers Maintaining Retirement Plans						1				1		
XVII.A.	Each State Hold Separate Conference on Aging At Least Every 4 Years	1					1	1			1		
XVII.B.	Conference on Aging Held in Washington, D.C. 18 Months Before Presidential Elections			1			1						

ACTION BY STATE GOVERNMENT UNITS
FACILITIES, PROGRAMS AND SERVICES

Responses on State action to implement recommendations of the Facilities, Programs and Services Section were received from 32 agencies representing 27 states. Of the 32 agencies reporting, 14 were State units primarily concerned with elderly affairs. Eight responses were from State welfare agencies, 7 from State social and rehabilitation agencies, and 3 from other State agencies.

Of the twenty-eight recommendations in this Section, indications of greatest activity appear to have been in the area of establishing multi-purpose senior centers which provide the focal point for service delivery program planning and delivery, and which provide the opportunity to involve older persons in policy, staff and volunteer roles. The next most significant area of activity reported was in the area of making reforms to fund a full range of services that assure independence for the elderly. This activity took the shape of supporting tax legislation, program advocacy, and information dissemination.

Financial Aspects of Providing Facilities, Programs and Services

In response to the call for a more equitable allocation of tax funds to provide the necessary services to maintain independence for older persons, most States viewed the establishment of better nursing home standards and the development of innovative service delivery programs as being most responsive. New York is encouraging the development of a program to provide foster family-type home care for adults while simultaneously offering family-type care homes to patients placed in community status. New Mexico's Aging Commission is working with the State Legislative Committee on Aging to study the needs of its older persons and to determine the best allocation of available resources. As an adjunct of this effort, the Aging Commission there is cooperating with other State and local counterparts of national voluntary organizations to include their resources as part of coordinated, overall planning efforts. In Massachusetts, the Governor issued Executive Order #84 which establishes home care priority, while Florida and Puerto Rico are using the Purchase-of-Service provisions under Title XVI of the Social Security Act to extend services to potential applicants.

Regarding the recommendations asking that older persons be allowed to equitably share the facilities programs and services available to other age groups, while recognizing the special and distinctive needs of the elderly, New Mexico has started cooperative efforts with the State's eight Planning Development Districts and Area-wide Planning Organizations to stimulate development of local offices on aging and to determine special community needs of more suitable facilities for older people. Hawaii is developing an "older persons" component to its housing, neighborhood centers, and school lunch programs. California has made it policy that the needs of the elderly should be included in service delivery planning. While Colorado has initiated a reduced rate fare system for the elderly, and is developing a special legal services program for the aged.

Concerning the call for States to fully implement the Social Service provisions of Titles I and XVI of the Social Security Act, many States indicated action to implement Title I while fewer reported action regarding Title XVI. A number of States also reported that, although their responsible agencies had taken steps for these provisions, the State legislatures had not acted upon requests for matching or supplemental funds. Additional funding problems were encountered by the Federal "ceiling" on further social service expenditures.

Recommendation XXVI, which requested a series of changes in the Social Security laws to extend and expand benefits, received support from the States primarily through agency endorsement of new legislation and through meetings with legislative representatives. New Jersey, Nebraska, Connecticut, Massachusetts, and Mississippi are initiating action to expand home care services or to study methods of providing home care services as part of other service delivery activities. In order to better act upon these recommendations, the New Mexico Aging Unit collected data via its senior citizen organizations to get ideas on how many people would be affected and what the impact might be.

Organization Responsibilities for Providing Services and Programs

Reacting to the recommendation asking for services to be made available through a combination of governmental, private non-profit, and commercial agencies -- with the Federal government responsible for financing a minimum floor -- many States are now contracting to purchase the needed services for older persons. Many agencies indicated that they are now using contractor organizations to provide a wide range of programs. Colorado, New York, Hawaii, Idaho, New Jersey, Montana, North Carolina, California, Massachusetts, Florida, and Nebraska are now allowing or would soon allow purchase of service contracts. Most of these activities are being funded under Title I and XVI of the Social Security Act, while others are using funds available through Older Americans Act Title VII funds.

California policy allows contracts with both public and private agencies while North Carolina has made allowances in its State plan for third party, non-Federal sharing. Following the Federal government's lead, Wisconsin has developed a series of booklets and slide programs they may encounter in the modern market place in view of the trend towards providing the necessary funds to encourage personal choice in selecting the most appropriate service to fit individual needs.

In developing a comprehensive mechanism at the Federal, State and local levels that is responsible for planning and coordination of all services for the older population, a variety of approaches have been taken in the absence of a strong central public agency. Colorado, Mississippi, New York, Hawaii, Puerto Rico and Nebraska have established strong links between Aging Commissions and their Advisory Groups, and the various leaders of the executive departments responsible for administering the programs most directly beneficial to the elderly in their States. Tennessee, Massachusetts and Kansas all developed area-wide planning projects, while Montana engaged in Executive Branch re-organization. New Mexico engaged in intergovernmental conferences

with regional Federal personnel and HEW agency representatives within the State. New York has partially fulfilled this recommendation through its continuing contact with some of the White House Conference on Aging Regional 10 Task Force personnel.

In following up on the recommendation calling for a strong Federal consumer agency, only Tennessee reported supporting such activities and that it was making referral to legislators to gain their support. Puerto Rico reported that it had an Administration on Consumer Services which assists the elderly, while New Mexico has increased its cooperative efforts with its long time State agency on Consumer Protection, a Division in the New Mexico Attorney General's Office.

Many States reported compliance with the recommendation that calls for Federal legislation to provide minimum quality standards and guidelines -- especially regarding staffing qualification -- in all Federally administered and Grant-in-Aid programs to the States. Tennessee asks for such qualifications and standards prior to making a grant. California is awaiting Federal legislation in many such areas to carry out the objective of this recommendation, except in the area of nursing homes for which standards have already been promulgated. Montana provides in-service training of its staff to be better prepared to look into grantee operations while Idaho reports increased training and staff personnel to deal with volunteer services used in skilled nursing homes, intermediate care facilities and shelter homes.

To assure that organizations provide clear and understandable information regarding policies and procedures affecting the delivery of services to the elderly, many States -- especially those with large non-English speaking populations -- have taken significant action to deal with this problem. Many such States now print brochures and fact sheets in Spanish, with California printing such materials in Chinese and Japanese as well. Hawaii has translated Food Stamp program materials in major ethnic languages -- as part of Project FIND -- while Nebraska, New Jersey and New York use bilingual staff personnel who deal directly with non-English speaking older persons.

In further action regarding the Food Stamp and Food Distribution programs, States have taken action to make the programs convenient while protecting the dignity of program beneficiaries. Many States reported active participation in Project FIND as an outreach effort to explain and assist the reluctant or unsure elderly of the benefits to which they are entitled through such food programs. Puerto Rico has developed a plan to determine when the concentration of commodity program beneficiaries becomes high and a new distribution place is established that is more convenient to the greatest number of program participants. Colorado created more sales locations to help food stamps to be more available.

Multi-Purpose Senior Centers

Concerning the recommendation calling for the establishment of multi-purpose senior centers, twenty-seven States reported the active establishment of such centers to act as the focal point at the community level to meet the service coordination and delivery needs of that elderly target population.

Areas of action include: continuation of existing plans and programs to further develop and expand senior centers; encouraging local communities -- through coordinated planning and funding incentives -- to include center development in local plans; meeting with local groups to discuss how centers can and should be used; providing staff assistance to local groups desiring to start such centers; and research into methods of developing, financing and planning for center use. New Mexico has urged that the revenues accruing from cigarette taxes be applied to senior centers, while simultaneously providing technical assistance to interested local and private groups planning their own centers. Other States, such as California, Florida, Massachusetts, and Connecticut have developed home care components out of their service center programs and are expanding such services through the active recruitment and use of volunteers.

Funds to support both multi-purpose centers and the service they provide have come from a variety of sources including those that have been made available through the Office of Economic Opportunity, and the Department of Housing and Urban Development, and from Social Service funds of the Social Security Act (Titles I and XVI), as well as Title VII of the Older Americans Act. These latter instances have used funds for the underwriting of services where facilities have already existed. Nevada has developed a manual and procedures guide to assist managers and operators of service centers.

Functions of the centers range from being a single purpose activity such as providing meals and food distribution to multi-purpose centers that provide individual counseling services, telephone reassurance programs, Meals on Wheels, RSVP and Foster Grandparent components.

Individual Rights and Protection

To assure that the elderly have a say in how services are delivered, and to participate in these programs that make services possible, the Conference recommended a number of steps that would guarantee older persons' involvement in the planning, operation and staffing of services programs. One specific guideline suggested was to avoid age as the sole criteria in determining factors for staff employment in programs for the elderly -- but to make sure that the elderly were included. Most of the States now indicate this to be their policy. Colorado, however, is working with its

counties to develop volunteer programs which will make better use of older workers as the State personnel system has age limits for hiring and retirements. Tennessee has developed a mechanism that instructs grantees to provide training opportunities, while Georgia has expanded its program to employ para-professionals. Nevada, in addition to requiring opening employment opportunities for the older worker, has added a senior employment unit to its Reno District Employment Office.

In response to the five-part recommendation XII, little action was indicated regarding the earmarking of funds for legal services. California, New Mexico, Maryland, Wisconsin, Georgia, Mississippi, and Puerto Rico indicated that legal services were being made available, while New York reported services were limited due to inadequate funding, and Idaho reported having initiated negotiations with Legal Aid agencies. Two States, Mississippi and New Mexico, reported that their legal services for the elderly were being underwritten through the Office of Economic Opportunity with the cooperation of the state Bar Associations. In New York's Southern Tier, East and West, lawyers volunteer their services equally to Legal Aid and to the elderly. Tennessee is conducting research into the problem of providing legal aid for the elderly through a special Governor's fund and a grant, while Idaho has initiated efforts to create a research component in its Research and Statistic Bureau.

Services to protect those elderly unable to manage their own affairs -- as recommended -- is available in a number of States. New York makes referrals in case of need to the Legal Aid Society. Hawaii, New Jersey, Colorado, Wisconsin, Idaho, Minnesota and North Carolina now provide on-going protective service programs, some being provided as the result of provisions required to receive funds under Title I, X and XIV of the Social Security Act. Idaho is also negotiating with Legal Aid agencies to purchase legal aid services, while North Carolina -- which provides such services through its local Departments of Social Services -- is studying legislation to provide alternative programs.

Regarding eligibility criteria for credit, insurance or employment, the Section recommended that other conditions be considered when age has been established as the sole qualifying criterion. Hawaii has introduced legislation to eliminate the age factor for drivers license renewal. Nevada is dealing with employment discrimination practices through its employment specialists. New Mexico is developing an approach to prevent loan companies from denying loans to people just because of their older age.

Consideration of the call to assure that programs be made available to all age groups and that special encouragement should be given to foster interaction between generations has been made in a number of states. Besides such Federally-supported programs as Foster Grandparents and RSVP, a number of States now designate specific activities to encourage multi-generational participation in programs. Puerto Rico now specifies that all community development programs under the auspices of the Department of Social Services must include the young, middle aged and elderly. New Mexico has made

provisions for the use of school children and college students in Senior Center Programs for the use of school children and college students in Senior Center Programs, especially in activities honoring the State's centenarians, as they are identified. Florida has identified a number of community joint aged-youth contact mechanisms which are being maintained and expanded. Idaho has initiated activities toward the development of its STEP program, while California underwrites 25 percent of the administrative costs of programs that assure mixed generations involvement.

Of major importance is the recommendation asking for greater participation of the elderly in the determination of policies and standards for facilities and services for the older population. Colorado has involved older persons actively in planning and recommending legislation and policy, and has plans to expand their participation. Wisconsin has appointed a group of elderly consumers to review and make suggestions in regard to new programs planned for use by the elderly. Connecticut has elderly consumer representatives on all Department committees, while Puerto Rico requires the involvement of older persons as part of any project funded through the Puerto Rico Gericulture Commission, or programs reviewed by the Commission. Some States, following the anticipated Federal requirements (Mississippi, New York, Montana, Nebraska, and North Dakota) have initiated action to develop State Councils on Aging which will actively involve older persons in the planning and decision making association with area-wide and comprehensive planning proposed under the Older Americans Act and the proposed new "special revenue sharing" block grants.

In addition to the above reported actions regarding consumer protection, steps to involve groups outside government have been minimal. Florida is coordinating outside interests in consumers affairs through a special operation in the Governor's office, while Wisconsin, Tennessee, and New Mexico are applying the offices of their advisory committees. New Jersey has undertaken a consumer education program.

To assure that programs and services are provided without regard to citizenship or residence, that minimum standards should be set by the Federal government's defined poverty level, and that lien laws be abolished while allowing a simple declaration of need to suffice to become eligible for services, the States reported a wide range of varying actions. In most cases, however, the thrust was to follow the guidelines of the revised Federal regulation governing public assistance. Whereas some States did not have lien laws prior to the Conference, some have since abolished them in anticipation of Federal law changes.

Responsibility of relatives is being minimized in most States except in California which is strengthening such provisions under its Welfare Reform Act. Concerning eligibility criteria, Florida requires one contact with the applicant to assure understanding of rights and responsibilities; California, Idaho, North Carolina, New Jersey, New York, Colorado, and Hawaii all use the simplified method of determining eligibility. Concerning residence and citizenship, most States have

adopted the lead of the Federal government and followed the guidelines laid down as a result of the recent Supreme Court rulings.

Other Action

In response to the recommendation concerning income levels as defined by the Bureau of Labor Statistics, and that no limit should be placed on Social Security beneficiary earnings, the States participating in the survey deferred to the Federal government in terms of taking significant action. Colorado supported changes in the Social Security Act and adjusts its cost of living allowance for the Old Age Assistance programs every six months -- but such revisions have not allowed payments to reach the BLS standard. In New Mexico, a research study undertaken by the State University's Department of Economics on public assistance standards and the poverty level, revealed -- and convinced seven state legislators to endorse the report -- that the legislature, and not the Welfare Department was the "misery merchant" because of the punitive attitude held by many legislators towards the agency, and their unwillingness to provide more adequate funds for public assistance.

To assure an adequately trained body of personnel to provide the necessary services and to manage programs for the elderly, many States have undertaken statewide or specialized training activities to facilitate implementing this recommendation. California, Nevada, New Jersey and Wisconsin all provide staff training in services. Idaho cites its participation with government agencies and private groups toward the development of standards and licensure for nursing home administrators, and its personnel participated in workshops and training programs with the staff members of nursing homes.

Montana employs spot surveys to determine training needs, while New York allows training costs as expenses through its purchase of service agreements in relation to senior centers development.

In reaction to that portion of recommendation XXVIII calling for the provision of a full range of institutional services while recognizing cultural differences, some States are developing comprehensive programs while others are providing such support through piece meal programs provided by public and private groups. North Carolina promotes the concept through the use of staff consultants; Nevada has established three levels of intermediate care facilities; and New Mexico is exploring just exactly how best to proceed through joint efforts of its Department of Health and Social Services, and its Department of Hospitals and Institutions. Minnesota is providing day care services.

Allowing individuals to obtain services through providers, including multiservice centers, has not been acted upon to any great degree. California reports that its grants have always included recreation allowances; Mississippi reports that welfare recipients in various homes have personal care funds included in the budget; and Puerto Rico allows for such services through area-wide projects.

Colorado law specifically prohibits such expenditures; Montana has left some of this activity up to the discretion of senior center directors; and Tennessee reports that some of its projects have been funded with such allowances.

Regarding the availability of a national health security program to provide comprehensive health care services, few States have taken action -- mostly as a result of waiting for signals from the Federal government to determine its plans for a national health plan. Mississippi has established three health care centers; and New Mexico reports that it has a comprehensive State health care program in which the Commission on Aging is working to resolve problems which have prevented the elderly from benefitting to any great extent. New York reports progress in its Southern Tier, East, through the efforts of the New York-Pennsylvania Planning Council.

RESULTS OF SURVEY ON ACTION BY STATE UNITS OF GOVERNMENT
FACILITIES, PROGRAMS AND SERVICES

RECOMMENDATION NO.		ADVOCACY			FUNDING	TRAINING	SUPPORTED LEGISLATION			INITIATED NEW SERVICES	DISSEMINATED INFO TO:		RESEARCH
		TESTIMONY	MEDIA	LITIGATION			FED.	STATE	LOCAL		GOV'T.	MEDIA	
I.A.	Tex Funds Should be More Equitably Allocated	10	4		4	3	4	8	2	7	7	8	5
L.B.	Supportive Community Services Must be Adequately Financed	10	7		5	2	4	4		1	10	11	2
I.C.	Allocate Public Funds in Sufficient Magnitude	8	6		1		2	7	1	2	5	6	1
II.A.	Develop Coordinated Service Systems for Elderly	6	5		6	2	3	6	3	4	7	6	
II.B.	Federal Financing for Minimum Floor for all Services	4	5		6	1	4	5	1	4	8	8	
III.	Establish Public Service Agency with Elderly Involved in Planning	5	4		6	1	4	6	2	4	8	7	
IV.	Involvement of all Ages in Determining Policies for the Older Population	5	4		2	1				2	8	8	
V.	Use of Elderly in Staffing Programs for the Aged	8	5		3	2	3	3	2	5	10	9	1
VI.	Special Consideration to Elderly in the Use of Facilities and Services	5	4		2	2	4	5	3	9	10	11	
VII.	Expand Consumer Protection and Education, Especially with the Elderly	3	2	2	1	2	2	3	2	5	3	4	1
VIII.	Establish Central Consumer Agency at Federal Level						1	1			2	2	
IX.	Protection of Civil Rights of the Elderly	10	5	1	1	2	3	8	3	6	9	13	3
X.	Analyze Criterion Based on Age to Determine Appropriateness for Particular Age	7	2			1	2	4	2		2	5	
XI.	Provide Minimum Quality Standards for Services and Care for the Elderly	2	1			1		1		2	5	3	

XII.A.	Earmark Funds for Legal Services	3	1		2	1	1	2	1	1	3	4
XII.B.	Provide Legal Assistance and Research Findings to Older Persons	6	2		1	1	2	2	2	3	3	6
XII.C.	Lay People be used to Advance Legal Concerns of Elderly	8	5	1	2		3	5	1	2	5	6
XII.D.	Establish Independent Legal Service Corporation						1				2	2
XII.E.	Provide Funds for Research of Legal Problems of Aged	1					1	1			1	1
XIII.A.	Insure Sufficient Income to Maintain Standard of Living	6	2		2		3	7	1		8	7
XIII.B.	No Limit Placed on Earnings of Social Security Beneficiaries	4	2				5	3	2	1	3	3
XIV.	Earmark Funds for Police Protection of Elderly	1	1			1	1	1	1	1	2	3
XV.	Encourage Interaction Between Young and Old	7	9		4		1	1		5	5	8
XVI.	Expand Information on Policies Affecting the Elderly	6	4		1	1	2	2	2		8	11
XVII.	End U.S. Involvement in Southeast Asia										1	1
XVIII.	Conference on Aging Should Establish Continuing Body of Delegates	4	2				2	2	1		3	4
XIX.A.	Establish Federal Department of Elderly Affairs	2	1				1	2	1		2	2
XIX.B.	Transfer of Appropriate Operating Functions from Other Federal Agencies	3	2	1			5	2	1		4	5
XX.	Increase in Social Security to \$3000 for Individual, \$4500 for Couple per Year	1									2	2
XXI.	Make OASDI Benefits Available to Residents of Puerto Rico, Guam and Virgin Islands	1	1				1				2	2
XXII.A.	Establish Supportive Services to Aid Elderly in Remaining in Familiar Environment	13	7		6	4	3	6	2	5	6	8

RESULTS OF SURVEY ON ACTION BY STATE UNITS OF GOVERNMENT

FACILITIES, PROGRAMS AND SERVICES (Continued)

RECOMMENDATION NO.	ADVOCACY			FUNDING	TRAINING	SUPPORTED LEGISLATION			INITIATED NEW SERVICES	DISSEMINATED INFO TO:		RESEARCH
	TESTIMONY	MEDIA	LITIGATION			FED.	STATE	LOCAL		GOV'T.	MEDIA	
XXII.B. Establish Preventive Services to Prevent Breakdowns of Capacity of Older Person	8	7		7	4	2	3	1	7	5	8	3
XXII.C. Establish Protective Services to Protect Civil Rights and Personal Welfare of Elderly	6	4		3	2	1	2	1	6	8	4	1
XXIII.A. Urge States to Implement Service Provisions of Titles I and XVI of Social Security Act	6	4		4	2	4	3	1	3	8	6	2
XXIII.B. Funding of Social Services Remain Open-Ended	10	6		1	1	10	5	1	2	8	6	
XXIV. Make Certification and Distribution of Food Stamps and Commodities Convenient	6	5		1	6	3	5	2	6	9	10	2
XXV.A. Public Assistance Benefits be Based on Need Alone	7	5	3	2	3	4	5	1	2	6	9	
XXV.B. Set Minimum Standards for Benefits at Federally Defined Poverty Level	9	4		1		4	6	2		4	2	
XXV.C. Eligibility Determined by Declaration of Need	3	3			4	2	2	1		6	6	
XXV.D. Abolish Lien Laws and Relative Responsibility Provisions	5	4				2	5	1		5	4	
XXVI.A. Guaranteed Income Increased to \$3000 Per Person, \$4500 Per Couple Per Year	8	7	1	1		10	5	3		7	6	
XXVI.B. No Ceilings on Earnings of Persons Receiving Social Security Benefits	3	2				2	2	1		3	3	
XXVI.C. Widows or Widowers Entitled to Receive Full Benefits of Spouse's Earnings	4	2		1		2	1			3	1	

XXVLD. Retention of Separate Benefits for Persons Earning Benefits Independently, Then Marrying	5	3			5	2	1		5	4	
XXVLE. Supplement Funds from Payroll Taxes with General Revenue Funds					1				1	1	
XXVIF. Abolish Retroactive Denial of Medicare Benefits	3	2	1		3	2	1		2	3	
XXVIG. Broaden Home-Care Services Under Medicare	5	5			1	1	1	3	4	3	1
XXVII. Adequate Training of Personnel to Implement Proposals	3	3	3	8	2	1	2	2	3	3	2
XXVIII.A. Allocation of Tax Funds to Finance Supportive Services	5	4	1	3	4	4	2	1	6	5	1
XXVIII.B. Use of Tax Funds to Support Institutional Care and Construct Facilities	4	3	4	2	1	1	1	4	4	4	2
XXVIII.C. Establish Comprehensive Health Care Services	7	4	1		4	2	1		6	5	

ACTION BY STATE GOVERNMENT UNITS
GOVERNMENT AND NON-GOVERNMENT ORGANIZATIONS

Introduction

A significant amount of interest was generated at the State level concerning the recommendations of the Section on Government and Non-Government Organizations. Forty-five questionnaires were returned, thirty-two of which came from individual State Units on Aging.

Much of the response material indicated that action at the State and local level had been stimulated in reaction to Federal initiatives and activities in addition to an increased awareness of the need for intra and inter-state cooperation. Areawide planning organizations were started in anticipation of AoA Title VII (Nutrition Program) funds, and the establishment of advisory groups -- involving the elderly -- were developed to comply with regulatory provisions.

Duties and Responsibilities of Government and Non-Government Organizations

A number of States reported that they were actively serving as advocates for the interests of the elderly not only as part of their regular duties but in other efforts as well. The mechanisms for advocacy, however, were diverse. Minnesota reports that the Governor's office has been a major source of encouragement and advocacy on behalf of the elderly, while Maryland reports that concern for its elderly is expressed in State-wide reviews of all of its plans for social services. Wisconsin cites that its Division on Aging encourages other non-public organizations to act as advocates for the elderly. The Indiana Aging Unit conducted a dozen legislative clinics -- which included active participation by older persons -- with candidates running for the Indiana State Assembly to recommend needed legislation for the benefit of the elderly.

In Georgia, the Office of Aging serves as an advocate within the State government and with the public -- making maximum use of older persons to speak out on their own behalf. Steps are also being taken to draw upon voluntary agencies' participation in local and areawide programs. Within Illinois, the Unit on Aging has been elevated to a higher status within the Department of Public Aid, and staff members have been made available to participate in State, local, and regional meetings of organizations which have definite advocacy roles.

Regarding the recommendation which places the burden, by funding and establishing standards, upon government units to assure that the necessary services and facilities are available to older people, a number of States have indicated a continuing and growing interest in assuming responsibility for meeting the needs of their older citizens. These responsibilities -- manifested in a variety of ways -- hinge primarily on the recognition that additional funds are needed to provide the services not currently available to meet the elderly's needs, and that an organized systematic approach is required. In addition to developing plans to take advantage of grant funds available through the Federal government (through the Older Americans Act and the Social Services provisions of the Social Security Act), many States have increased their own funding levels based upon determinations of local and areawide needs. Colorado, Mississippi, Iowa, New York and Illinois all reported expansion in State appropriations for aging services and programs. Most States report that their planning is now areawide and based upon evaluations of comprehensive planning. To encourage older persons' participation in the planning, official policies in many States have been developed which make possible greater involvement of the elderly. Other States report greater involvement through the use of RSVP and special training workshops to encourage and instruct the elderly on how their contributions can best be realized.

To further accelerate the participation of private enterprise and voluntary organizations, especially from organizations comprised of the elderly, twenty-two State agencies report that they are now actively including the private sector in the planning and delivery of services for meeting the needs of the elderly. South Carolina has sponsored workshops in retirement planning; Wisconsin cites that it supports the purchase of services from private groups; Delaware is convening advisory councils; and Illinois reports that expanded resources now make it possible to extend the instances to involve the private sector. California reports that priority is given to private sector organizations in the awarding of Title III (Nutrition Program) grants. Indiana reports a joint effort between the Nursing Homes Association and the State's Universities to train non-professional employees in extended care facilities in Indiana.

Organizational Structures

Past experiences with the diffuse administration of programs and planning for the elderly led to a major recommendation calling for the creation of strong Central offices at all levels of government, within the Office of the Chief Executive, to coordinate and plan all aging service programs. Two States report that such

organizations existed before the Conference, while seven States reported that such organizations have been established since the Conference or are in the process of being established.

The range of functions of these organizations vary from being advisors to the Chief Executive to those with broad jurisdictional powers to coordinate Statewide program actions on behalf of the Chief Executive. Many of those reporting also indicated that they were encouraging the Chief Executives at county and city levels within their State to appoint counterparts.

Concerning the need to continue the work of the White House Conference past its year of action, Idaho reports that it plans to report on follow-up actions at its annual State conference on aging, held every May. Other States report that they have and will continue to communicate with members in their State who are on the Post-Conference Board and will determine, subsequently, the best course of action. New Jersey reported that it held follow-up conferences in all counties to report the outcome of the National Conference and to develop the means for continued efforts in support of implementing Conference recommendations. Louisiana also reports that it holds an annual conference on aging which involves evaluations of past actions and the development of plans for future action. North Dakota has held two follow-up sessions with plans to continue them on a regular basis.

New Mexico reported that it was taking steps to urge creation of a Special Committee on Aging within the U. S. House of Representatives -- as in the U. S. Senate -- by cooperating with New Mexico's two Congressmen who have introduced legislation to achieve such a goal.

Organization Mechanisms to Assure Service Delivery

The establishment of joint agreements of responsibility for the research, comprehensive planning and provision of services and facilities to the elderly, as recommended, has occurred in a number of States. Almost all of the States reporting indicated that they had or would soon have area-wide planning organizations which included all levels of government within the State as well as advisory organizations which included large complements of older persons. Rhode Island has established a state-wide, area-wide task force while task force groups at the local level make inputs to area-wide program planning operations. All persons serving on these bodies are given technical training. Massachusetts has developed citizen advisory committees which are required to have 51% elderly representation.

Idaho is developing organizational relationships through its Council of Governments and Aging Task Force, while South Carolina is attempting to work out joint planning for the elderly with the Department of Social Service.

To assure that planning and service delivery is both vertical and horizontal, and includes all segments of the service delivery community as well as the elderly themselves, the States have responded actively to the Federal Nutrition Program guidelines. Since the guidelines require coordinated efforts by State and local community organizations -- in addition to representatives from the private non-profit and private-for-profit community as well -- most state-wide planning organizations set up in response to anticipation of Federal requirements are adapting the principle of this approach by sharing their ideas and plans across all jurisdictional lines and with the governmental bodies above and below them. Connecticut now has a clearing house for organizations interested in legislation for the elderly and State legislation was passed designating local municipal agents. Nevada uses a newsletter of citizen advisory councils for its aging projects and area agencies on aging. Indiana and Idaho use the active involvement of State and local organizations in conferences to inform all interested parties of relevant activities and plans.

Personal Rights and Freedoms

Reaction to the recommendation citing that basic facilities and services should be provided as rights to which all older persons are entitled, and especially the adversely circumstanced, a number of steps have been taken. Illinois has developed three major pieces of legislation aimed at helping the poorer segments of the aging population. These include homestead exemption, exemption of pensions from state income taxes, and a "circuit breaker" law to provide realty tax reductions for elderly homeowners and renters. Mississippi and Missouri report active efforts to enlist the adversely circumstanced in planning and service activities, while Maryland is conducting a study to determine the feasibility of multi-service centers in concentrated areas as methods of improving social services for the elderly. California is giving priorities to organizations serving disadvantaged citizens in the grants it awards, as does Rhode Island. Idaho has developed a "Blueprint for Action" following the course of action proposed by the Conference, while the representative of the Puerto Rico Planning Board who serves on the Gericulture Commission is following up to see that such proposed changes are approved.

Assuring that services and programs are consistent with the principles of the First Amendment was another major Section recommendation. Most States indicated that their laws and regulations are designed to achieve this goal and that they are consistent with Title VI of the Civil Rights Act. Many States have developed Affirmative Action Plans and require grantees to sign assurance of compliance with the Civil Rights Act provisions. Mississippi reports that its efforts are designed to further the national goal which is to promote independent living and prevent unnecessary institutionalization. Indiana cites that its programs are ecumenical and non-racial, and that its organizations are endeavoring to promote employment practices which eliminate age discrimination. Missouri policy stipulates that senior centers and volunteer organizations, partaking of State funds, must prescribe to this philosophy.

**RESULTS OF SURVEY ON ACTION BY STATE UNITS OF GOVERNMENT
GOVERNMENT AND NON-GOVERNMENT ORGANIZATION**

RECOMMENDATION NO.		ADVOCACY			FUNDING	TRAINING	SUPPORTED LEGISLATION			INITIATED NEW SERVICES	DISSEMINATED INFO TO:		RESEARCH
		TESTIMONY	MEDIA	LITIGATION			FED.	STATE	LOCAL		GOV'T.	MEDIA	
I.	Encourage Agencies to Undertake and/or Pursue the Advocacy of Older People's Interests	17	8		6	3	3	9	1	3	17	19	3
II.A.	Establish Central Office on Aging to Coordinate all Programs	6	2	1	7	2	4	4	1	4	10	10	2
II.B.	Establish Post of Asst. Secretary for Aging in Each Operating Department with Coordinating Council	1	2		1	1		1	1		2	2	
II.C.	Assisted by Advisory Council at the Federal Level	1	1		1	1		1	1		2	2	
II.D.	Central Office Should Make Annual Progress Reports	5	1		4	2	2	2	1	2	8	7	1
III.	Coordination Between Agencies in Aging and Other Public Agencies	6	4	1	10	6	3	4	2	7	11	9	6
IV.A.	Emphasis on Governmental Responsibility in Funding and Establishing Standards	6	5	1	16	6	4	7		7	14	10	4
IV.B.	Maximize Use of Voluntary and Private Organizations in Delivery of Services	6	7	1	9	5	4	4	1	10	12	14	2
V.	Coordinate all Local, State and Federal Agency Activities in Aging	11	9	1	6	3	3	5	2	7	18	17	2
VI.	Encourage Participation of Private Enterprise and Voluntary Organizations	5	8	2	8	5	1	2	2	3	13	15	2
VII.	Provide Basic Facilities and Services to all Older People	11	7	1	7	2	2	4	1	5	12	14	2
VIII.	Provide Legal Services and Protect the Civil Rights of the Elderly	6	7	2	3	1	2	3	1	3	9	12	1
IX.	Improve Communication from Federal Agencies to State Units	2			1					1	4	2	
X.	Establish Special Committees on Aging in U.S. House of Representatives	2	1				2				2	4	

XI.	Allocates Greater Share of Resources to Meet Needs of Elderly	11	5	1	1	5	5	2	1	8	9	1
XII.	Continues Conference on Aging to Aid Follow-Up of Recommendations	4	1	1		1	1			5	6	

ACTION BY STATE UNITS OF GOVERNMENT

HOUSING

The recommendations of the Housing Section drew 13 responses, four of which came from housing departments, seven were from agencies for the aging and two were from other units of State government.

Only a few States have publicly assisted housing programs at the State level. In the United States, housing programs are primarily a responsibility shared by the Federal and local governments (or by the Federal government and private developers). The Federal government establishes policy, sets guidelines and procedures, and provides funds; local housing authorities take the initiative on project development and have the responsibility for subsequent operations. Given this general pattern of inter-governmental relationships in housing programs, the limited return from State agencies is not surprising.

The primary focal point of publicly assisted housing activity outside of the U.S. Department of Housing and Urban Development is the Local Housing Authority. It must be added, however, that under existing policy and funding arrangements, even at the local level the impetus for program activity is substantially determined by Federal policy standards and the availability of Federal funds. This inter-governmental distribution of responsibility in housing is not likely to be significantly altered in the foreseeable future as far as the State is concerned. The Federal Administration is actively seeking to consolidate, simplify and decentralize some of its existing housing programs. This decentralization would be down to the local level, not to the State. Therefore, the Local Housing Authority may become an increasingly significant point of decision-making in the future.

Given the limited scope of State activity in housing programs, it appears on balance, that the States have been very active. Most of the action took the form of legislative testimony or dissemination of information.

Housing Need

A leading recommendation of the Housing Section called for a minimum of 120,000 units of elderly housing to be provided annually from Federal, State and local funds. The Maryland Commission on Aging and the Montana Aging Services Division testified in support of legislation designed to help meet this goal, while four other States reported active media programs to inform legislators, the public and industry of the need for better housing.

Two State housing agencies reported action on the recommendation. The Massachusetts Housing Finance Agency said approximately 10 percent of its housing units are for elderly only. The agency said, however, that its housing projects are mostly for mixed (income and mixed age) groups. Therefore, it is difficult to cite specific actions for the elderly although the elderly generally get preferential treatment. The South Carolina State Housing Authority said it had no fixed proportion for the elderly but it was making an application to HUD for elderly housing. The Michigan State Housing Development Authority said it had taken no action on the recommendation itself, but, informally, the agency has set goals to build a specific number of units for the elderly. In Nevada, the Office of Economic Opportunity said it had taken action to initiate new services with the organization of local and State housing authorities.

It should be noted that few State housing agencies responded positively on the recommendation for earmarking. It would appear from this very limited response that proposals to earmark housing units for the elderly in State programs can only have a limited potential for success unless more States enter this area of governmental activity.

Alternate Living Arrangements

Actions reported to provide a full range of living arrangements chiefly took the form of legislative testimony, research and dissemination of information. (Massachusetts reported that all of its developments have community areas and some provide food and health services.) The Kentucky Program Development Office reports that the State is taking action in this area through a combination of Federal and State funding.

In a related recommendation, the Housing Section urged development of more congregate housing which includes services for residents and offers outreach services to the neighborhood elderly. On this, action reported was through legislative testimony and public information activities by the agencies for the aging.

Property Taxes

Recommendations to provide property tax relief for elderly homeowners and renters drew a very positive response. Of the 13 reporting agencies, 10 said they were taking some kind of action. The agencies for the aging all reported taking some form of advocacy action. The Connecticut Department on Aging, for example, said it had established a clearinghouse for elderly groups concerned with gaining more liberal property tax treatment. Three State housing agencies also took advocacy action. Kentucky reported new State legislation providing that homeowners, at reaching age 65, will have their valuations reduced by \$6,500. The Nevada Office of Economic Opportunity responded that the Governor supports relief and that legislation was being prepared for introduction to the legislature.

Property tax relief through Federally-financed incentives was also recommended for non-profit sponsored elderly housing projects. Advocacy action has been taken by five State agencies and the Maryland Commission on Aging has proposed such legislation. The Massachusetts Housing Finance Agency expanded the thrust of the Conference recommendation and has presented testimony urging such incentives be extended to all subsidized housing.

The Michigan State Housing Development Authority reported that existing State law provides exemptions for 202 housing projects and it is urging this law be extended to the 236 program. Such extension would be most desirable since the 202 program is being phased out by the Federal government and 236 development is accelerating. Nevada reports the Governor supports exemptions proposed by the recommendations while Kentucky allows such exemptions although, according to the Program Development Office, the constitutionality of the exemptions is in question.

It would seem from the response that this issue is one that draws support for action from many sources and in various forms. A similar interest was shown in the State responses to the recommendations on property taxes made by the Income Section. With the Administration commitment to action on property tax relief, there is reason to be encouraged about the prospects for property tax relief for the elderly in the foreseeable future. This relief may not, however, be uniform across the Nation since State and local officials at a recent meeting of the Advisory Commission on Inter-Governmental Relations expressed concern about and opposition to a large national role in the field of property tax administration.

Rent Supplements

In general, housing recommendations calling for Federal action drew little State reaction. An exception, however, was the recommendation to expand the rent supplement program. Nine agencies reported taking some kind of action concerning rent supplements. Most were some kind of support (testimony, information) for continuation of the program. The Massachusetts Housing Agency reports it has been lobbying for continuation of the program. Michigan has conducted a program to train marketing agents to assist applications for rent supplements and it has requested 40 percent rent supplements in elderly developments. Kentucky has new State legislation permitting purchase of mortgages, but not direct investments in rent supplement projects.

This response, although limited, suggests that the rent supplement program is popular with State housing agencies and agencies for the aging and they would like to see it expanded.

Other Actions

The Kentucky Program Development Office reported actions that could contribute significantly to housing needs in that State. It has drafted new housing legislation in hopes of making the Housing Authority operational during the next fiscal year. It also reported completion of its Appalachian Development Plan which proposes some of the changes recommended by the WHCA. In Maryland, housing needs of the elderly may gain more visibility. The State Commission on Aging may be adding a full time specialist on housing to give leadership on a statewide basis and to serve as a resource for interested local groups.

The Nevada Office of Economic Opportunity has been active in promoting elderly housing needs. State OEO officials have met with housing authorities in 12 towns and counties in rural areas and received their endorsements for low rent housing for the elderly. These same government bodies have also endorsed the creation of a regional or a State housing authority. Legislation for a State authority was to be introduced to the State Legislature in February 1973. The Governor has endorsed the move.

Conclusion

With only a limited number of States having State-level housing programs there can only be limited expectations for success at this level on many Conference recommendations. This may, however, present an opportunity to State Aging Groups. Elderly housing tends to present fewer planning and development problems than general housing projects. Elderly housing might thus serve as a feasible and acceptable opening wedge for initiating new State-level housing programs. It is clearly an area in need of substantial future effort by those representing the interests of the elderly.

RESULTS OF SURVEY ON ACTION BY STATE UNITS OF GOVERNMENT

HOUSING

RECOMMENDATION NO.		ADVOCACY			FUNDING	TRAINING	SUPPORTED LEGISLATION			INITIATED NEW SERVICES	DISSEMINATED INFO TO:		RESEARCH
		TESTIMONY	MEDIA	LITIGATION			FED.	STATE	LOCAL		GOV'T.	MEDIA	
I.	Earmark a Fixed Proportion of Funds for Housing for the Elderly	6	2			1	1	3	3	2	5	5	
II.	Base Eligibility for Benefits of Low and Moderate Income Housing on Economic, Social and Health Needs	6	3		1		1	3	2	1	4	5	2
III.	Ensure that Private and Non-Profit Groups Produce Suitable Housing For the Elderly	4	3				2	4	2	1	5	6	1
IV.	Variety of Living Arrangements to be made Available to Meet Changing Needs	5	3		1		1	3		5	6	1	
V.	Emphasis on Providing More Congregate Housing for Elderly	4	2				1	2	1		5	5	
VI.	Provide Local Property Tax Relief for Elderly Homeowner and Renter	7	5			1	1	8	2	2	6	6	1
VII.	Eliminate Red Tape and Procedural Delay in Production of Housing	2	1			2	1	2	1	3	2	4	1
VIII.	Designate 25% of Elderly Housing for the Hard-Core Poor Elderly	3	2			1	1	1	1		3	2	
IX.A.	All Federal Agencies will Form Guidelines for Architectural Standards	2	1				1	1	1		2	2	1
IX.B.	Multidisciplinary Teams will Review and Approve Innovative Proposals	2	1				1	1	1		2	1	
X.	Assist Nonprofit Groups in Developing Housing for Elderly	1	1		1		1	1	1	1	1	2	
XI.	Provide Replacement Units and Relocation Programs Before Displacing Elderly	2	1				1	2	1	1	1	2	1
XII.	Redefine Definition of Family in National Housing Act	1	1				1	1	1		2	2	
XIII.	Encourage the Preservation of Neighborhoods, with Provision for the Elderly of the Area	3	3				1	2	1	1	2	2	

XIV.A.	Administration Should Release Section 202 Funds	2	1					2	1			
XIV.B.	Fund New 202 Projects with Recirculated Funds	1	1					1	1			
XIV.C.	Establish Incentives for Converting Section 202 Funds	2	2		1	1	1	1	1			
XV.	Increase Funds, Eligibility for Rent Supplement Program	6	2		1	1	4	1	1	3	3	
XVI.	Provide Financial Incentives to Families Providing Care for Elderly	1	1			1	1	1		1	1	
XVII.	Encourage Property Tax Exemptions for Private Elderly Housing	3	1			1	3	1		3	2	
XVIII.A.	Provide Low Cost Loans for Home Maintenance	1	1			1	1	1		1	1	
XVIII.B.	Provide for Home Equity Use as Discretionary Income	1	1			1	1	1		1	1	
XIX.	Congress Should Create Special Office for Elderly Housing in HUD	1	1			1	1	1		1	1	
XX.	Create Executive Office on Aging Within White House	1	2			2	1	1	1	1	2	
XXI.	Create Special Comm. on Aging in House of Representatives	2	1			1	1	1		1	1	
XXII.	Pass Law to Protect Elderly From Unscrupulous Real Estate Operations	3	2	1		1	2	2	1	1	2	
XXIII.	Enact Law to Provide Rural Housing and for Housing on Indian Reservations	1	1				1	2	1	2	2	
XXIV.	Physical and Environmental Security Standards Should be Developed	3	1		1			1		3	4	1
XXV.A.	Expand Research in Housing for Elderly	2	1		1		1	2	1	5	5	5
XXV.B.	Provide Training for Housing Development Management	2	1		2	3	1	2	1	1	2	2

- 25 -

ACTION BY STATE UNITS ON AGING

INCOME

Responses on the recommendations of the Income Section were made by 31 States. of these, nine came from State agencies on aging, nine came from public welfare departments and 13 came from social service agencies which possibly included an aging unit and/or responsibility for the State welfare program.

In analyzing the responses of the States there are three factors that must be considered:

1. Type of agency responding. In the area of income, agencies for the aging tend to have few program responsibilities, being primarily charged with advocacy and information roles.
2. Type of action taken. These ranged from advocacy roles such as legislative testimony and public information, to actions with a direct impact on the problem. These direct actions include funding and initiating new services. Intermediate actions would include such things as research and training.
3. Type of action recommended of WHCoA. This is highly important to gaining the proper perspective on the State responses to the recommendations of the Income Section. Of the 12 recommendations from the Section, most concerned actions needed at the national level. These include a national income maintenance system change in the Social Security program, Medicare, and a national health plan. In these areas, the role of the State can only be indirect, primarily one of the information and advocacy.

Thus, potential for direct State action on funding or services is confined primarily to issues of Medicaid, property tax relief, health manpower, and Old Age Assistance payments.

Income Standards and Adequacy

Regarding the question of income standards, the State role has been concentrated essentially to income standards of Old Age Assistance programs for those elderly without Social Security retirement of whose Social Security benefits are so low they must be supplemented by OAA.

In the area of income standards, the action of State units on Aging has been primarily one of advocacy in the form of legislative testimony or public information. The Iowa Commission on Aging completed a research project on the cost of living in non-urban areas of the state to determine income needs. The New York State Office for the Aging also conducted research on income adequacy.

Actions by State welfare offices were varied despite their direct concern with assistance payments. Pennsylvania's Department of Public Welfare initiated new services in day care, transportation, and outreach. The Ohio Department of Public Welfare is seeking to increase the minimum income permitted an applicant in a nursing home.

More action on income adequacy was reported from the group of social service agencies. Three states (Kansas, Idaho, Montana) and Puerto Rico reported advocacy action on behalf of adequate income standards. In more direct action, Colorado law now requires adjustments in its assistance payments as the cost of living increases. The adjustments are made twice a year. As a result, the payment to an elderly couple in Colorado has increased from \$268 a month in April 1970 to \$294 in October 1972. The State reported, however, that payments to a single person are one-half that of a couple, as opposed to the 75 percent level recommended by the Income Section.

Florida reported both advocacy and direct action with increases in payments standards and grants. The California State Department of Social Welfare said it has increased state funding of welfare programs, and the Georgia Department of Human Resources has increased its standards and payments for the elderly handicapped.

In sum, the responses reflect significant actions being taken at the state level to meet the problem of income adequacy, but it must be reemphasized that the state's capacity for meeting the standards of the recommendations is limited. In some cases the Federalization of Supplemental Security Income payments reinforces the National-level focus, except in those instances where the Federal benefit (payment) is less than that which the States already provide. In such cases it is hoped that the States will provide the necessary funds to maintain payments at the previous level.

Property Taxes

A point to be noted in the area of property tax relief is that while some States have a property tax at the State level, the property tax is primarily levied by local government. Thus, the role of the States in granting relief is frequently confined to enabling legislation with local government having the option of granting the relief. It should also be noted that, except for advocacy, the agencies responding have had little to do with tax policy making or administration.

The property tax recommendation carried two different approaches to relief within it: (1) State and local remission or exemptions for elderly property owners; and (2) a grant system to achieve tax remissions. It is apparent from the responses that property tax relief has been considered more in terms of exemptions and remissions than a new Federal or State grant program. In all, 17 agencies reported taking action on the remission approach. Proportionately, the aging agencies responded the most affirmatively, their role being chiefly one of urging legislative action or providing data.

In action taken by the States, New York has raised from \$5,000 to \$6,000, the maximum exemption for persons 65 and over with limited income. Delaware passed legislation enabling counties to reduce property tax--based on income. Pennsylvania enacted a property tax relief law for the elderly, effective April 1, 1972. California has a property tax relief law for the elderly other than those on public assistance. Colorado passed a State property tax bill in 1972 for those with assets under \$20,000 and annual income under \$2,400. The new law allows a 50 percent rebate. The city of Denver is trying to pass an ordinance for local property tax relief. Florida has a \$5,000 tax exemption for persons 65 or older.

It should be noted that of the State laws reported, the criteria for relief is not necessarily confined to age. In some cases, relief is based on age alone, in other cases it is general relief linked to income. A third model is a combination of age and income. The different approaches carry significant differences in their impact on government revenues, particularly local government which relies on the property tax as its single largest source of income.

Medical Care

The health care recommendation (X) of the Income Section, like the income standards proposal, is divisible in its focus at the national or state policy level. State action is applicable to portions dealing with Medicaid changes and with health manpower and facilities. These differences in policy focal points are reflected in the questionnaire responses which indicate action at the State level as being that of an advocate.

The role of the aging agencies tended to be one of presenting legislative testimony and providing public information. In one case, New York, the State Office for the Aging organized opposition to Medicaid reductions and made the program known to those eligible but not receiving aid. This office also carried out a research project in a major city to determine the medical needs of the elderly.

The responses of the welfare and social services agencies were significant because these organizations frequently are the administering body for Medicaid. On health care benefits, 13 of these agencies responded that some form of action has been taken relating to the Conference recommendations. Some states pointed out that the range of services recommended were already being provided under Title XIX (Medicaid) and some reported that these services were available prior to the WHCoA.

The New Hampshire Division of Welfare reported it has instituted new homemaker and health aide services. Ohio is considering more alternatives to institutional care under its Medicaid program. Georgia reported liberalization of Medicaid. Idaho has added the purchase of prescription drugs to its program. In Hawaii, when an elderly person has no resources, the Department of Social Services meets co-payments and co-insurance costs. And, in Colorado, the Department of Social Services has pushed for Federal legislation for out-patient drugs under Medicare. A significant action in Georgia to improve health care delivery for the elderly was the establishment of a Department of Human Resources charged with coordinating a variety of programs concerned with the elderly.

Other Activities

Some states have also taken actions on recommendations related to those approved by the Income Section. The Arizona Governor's Council on Aging is formulating a state nutrition program incorporating recommendations of the WHCA. The New York Office for the Aging encouraged older people in New York to press for renewed consideration of the Nutrition program which was vetoed as part of the HEW-Labor Appropriations bill.

In Nevada, the Welfare Division removed citizenship as a requirement for welfare eligibility and has adopted a declaration of need for determining eligibility in the adult categories. The Pennsylvania Department of Public Welfare has taken steps to assure that persons eligible for public services will receive these benefits. It pays for legal services for all persons who challenge decisions to deny, reduce or limit benefits under Medicaid or OAA. The Department also notifies, in writing, all persons whose benefits are denied, reduced or limited that they have the right to legal representation and the sources from which it may be obtained. In California, the needs standards for the adult welfare categories were increased by a flat \$12 on October 1, 1972. The California agency also reported that all documents issued to recipients affecting changes in grants are now produced in both English and Spanish.

Conclusions

In summary, the cumulative thrust of the recommendations in the Income Section was to call for national policy initiatives and leadership. While State action could be important in meeting the national income goals set forth by the Conference delegates, there was not a direct mandate of the delegates to this effect. Even those areas presently outside Federal policy determination, such as property taxes and OAA payment levels, the recommendations contemplated elevating some or all of the States' responsibility to the national level. In the area of health care, the Conference sought to establish a national health care system, thereby eliminating the separate Medicaid program and ending the existing State role in providing these services. Within this context of nationally-oriented policy, the absence of broad, firm action and major new policy initiatives at the State level is less disturbing.

RESULTS OF SURVEY ON ACTION BY STATE UNITS OF GOVERNMENT

INCOME

RECOMMENDATION NO.	ADVOCACY	SUPPORTED LEGISLATION					INITIATED NEW SERVICES	DISSEMINATED INFO TO:		RESEARCH			
		TESTIMONY	MEDIA	LITIGATION	FUNDING	TRAINING		FED.	STATE		LOCAL	GOV'T.	MEDIA
I.A.	Income Adequacy for Older People	7	4	2	1	1	6	7	1	7	8	3	
I.B.	Adjust Minimum Standard of Living Level with Change in Cost-of-Living and National Standards.	7	4	1	3	1	6	7	1	6	6	2	
I.C.	Minimum Annual Total Income for Singles Sufficient to Maintain Same Standards	6	2	1	1	1	6	8	1	1	5	6	2
II.	Provide Floor of Income Through Payments from Social Security Tax Revenues	6	3				5	4	1	1	5	5	1
III.A.	Increase Earnings under Retirement Test to Not Less Than \$3000	5	3				5	3	1	1	4	4	1
III.B.	Offset \$1 Reduction in Benefits for Each \$2 of Earnings	2	1				2	1		1	2	3	1
IV.	Make Widows Eligible to Receive Benefits at Age 50	3	3			1	2	2	2	1	3	4	
V.	Extend "Special Age-72 Benefits"	3	1			1	4	2	1		3	2	1
VI.	Determine Position of Disadvantaged Groups Under Social Security	2	2		2		2	2	1	3	3	3	1
VII.A.	Include Portion of General Revenues in Financing Social Security System	3	2			1	2	1		1	2	2	1
VII.B.	Review Structure of Payroll Taxes	4	3				4	4	1		4	4	1
VIII.A.	Augment Social Security Benefits Through Private Pension Plans	3	3				4	2	2		5	4	1
VIII.B.	Encourage Broader Coverage Under Private Pension Plans	3	2		1		2	3	1		3	3	1
IX.A.	Older Persons Should Be Encouraged to Live in Their Homes	8	6				4	14	6	1	7	6	1

-530-

IX.B.	Remit Part or all of Residential Property Taxes on Housing Occupied by Elderly	3	3	1	2	4	2	1	3	3	1
X.A.	Establish National Health Security Program	6	5		3	3	1		4	5	1
X.B.	Increase Medicare—Medicaid Benefits	8	5		7	9	1	1	9	8	1
X.C.	Improve Organization and Delivery of Health Services, Assure Supply of Health Manpower	7	6	2	6	4	2	2	7	6	1
XI.	Establish Committee for Social and Economic Problems of the Aged	3	3		2	2	1		3	3	1
XII.	Re-Ordering of National Priorities	4	3	1	2	2	1	1	3	4	1

ACTION BY STATE UNITS OF GOVERNMENT

NUTRITION

Introduction

To the six recommendations of the Section on Nutrition, thirty questionnaires were received from State agencies outlining their activities in the field of nutrition programs for the elderly. Twenty-nine of the respondents were State units on aging.

The responses, in general, revealed a broad span of activity, much of it consistent with the specific goals and objectives desired by the conferees. More could have been accomplished, according to many respondents, had funds for Title VII of the Nutrition Programs under the Older Americans Act been funded as proposed, and in accordance with the timeliness of fund availability as had been anticipated at the State level. Many programs are in the ready stage but lack the expected resources to proceed.

Additionally, a few States cited their involvement in Project FIND as being responsive to developing innovative and meaningful approaches to meeting the nutritional needs of the elderly. Whereas Project FIND was a Federally-conceived and initiated effort, it relied to a great degree upon the cooperation of State and local officials in enrolling eligible older persons, and for administering the food stamp and food distribution programs supported by Federal funds and resources. A carry over of the intent of Project FIND -- to assure that the elderly are made fully aware of their rights and privileges under the law -- and to develop a community spirit to assure that local needs are met, has also been evident from the State responses.

Group and Congregate Feeding

Conference recommendations dealing with group feeding and nutrition programs in congregate housing have received significant attention in the States. Several units have funded expanded nutrition programs or financed planning grants to map strategies for providing improved services in these areas.

In Nebraska, the town of Burwell is being promoted as a model where a successful Housing Authority project provides meals in a congregate care setting. Meals in a group environment are a major part of the New Jersey State plan and the North Dakota plan has been amended to emphasize the importance of such meals. The Indiana Commission on the Aging and Aged is cooperating with State housing authorities to develop a program of group feeding, and the concept is already operational in Tennessee.

Complete conversion to a Statewide Food Stamp Program was reported from Florida, New Mexico, New Jersey and Arizona. The change-over is scheduled to be completed soon in Georgia, and the Oklahoma Special Unit on Aging states that "excellent" progress is being made in that State toward the Food Stamp Program conversion.

Applications for food stamps may now be made through the mail in Hawaii and, in West Virginia, stamps are mailed if the recipient is receiving welfare. In Rhode Island stamps are available at most banks under an agreement executed by the Governor's office, while in Indiana, senior centers and clubs have assisted the elderly in procuring stamps.

Self-certification of eligibility is operational in both Hawaii and Alaska, but the New Mexico Commission on Aging maintains that such a program proved unsuccessful when initiated there. Maryland, West Virginia, Hawaii, Georgia, California, New Jersey and Rhode Island now permit the use of food stamps in purchasing prepared meals as well as direct foodstuffs. Similar allowances are being advocated by aging units in Tennessee, Florida, Oklahoma, New York, Indiana, and New Mexico.

In order to better serve the aged recipients, the Puerto Rico Gericulture Commission, in cooperation with the Department of Social Services, has arranged for donated food to be packaged in suitable sizes and made readily available.

Special Programs

The Indiana Commission on the Aging and Aged has developed a congregate feeding project operated primarily for the benefit of Black, Asian-American, and Spanish-Speaking elderly. Special dietary, cultural, ethnic and religious preferences are included in Rhode Island's nutritional program which has also been expanded to reach the rural aged. In addition, the State provides transportation to those otherwise unable to participate in centralized projects. In other special actions, the State of Nevada has made nutritional programs for aged Blacks proportional to their number in the population and plans to place all Nevada Indians under a single nutrition program area, thus recognizing their unique needs. The Puerto Rico Gericulture Commission is working with the Isolated Communities Programs and the Department of Education to make available nutrition programs to rural aged.

Education and Standards

Recommendations for improved nutrition education standards have received less than foremost consideration as reported by some States. However, other States are making attempts to implement Conference recommendations.

An innovative, areawide project has been initiated in Rhode Island at ten feeding sites. Here, speakers, social hours or other diversionary activities are included once a week as part of group meal programs. (In a somewhat related answer to the Conference's questionnaire, the

New York State Office for the Aging confirmed the Delegates belief in the value of group feeding. The Office reported that a significant psychological uplift was given to participants of communal meals following the severe flooding and displacement caused by Hurricane Agnes.)

Several projects similar to the School Lunch Program have been set up in Hawaii and Massachusetts. In Rhode Island, public housing developments for the aged are cooperating with local schools to provide noonday meals for the aged. The lunches prepared in the school kitchens are delivered to the housing projects' community centers and may be purchased for 65¢. The New Mexico Commission on Aging is working with the State Department of Education in planning ways that school cafeterias can be used for feeding the elderly.

Home-Bound and Low Income Aged

Efforts were also reported by the States to encourage communities in providing services such as food purchasing as well as meal preparation and for home delivery for those unable to attend a central nutrition project.

The Idaho Office on Aging emphasizes the importance of nutrition delivery systems in all on-site visitation conferences with project grantees. Several colleges and churches in Nevada are involved as sponsors of outreach programs and the Massachusetts Executive Office of Elder Affairs has initiated a delivery service for institutional home care which includes nutrition. A Title III project in Delaware involves shopping assistance, delivered in conjunction with senior centers, and the Florida Department of Health is providing consultation for communities which wish to establish nutrition outreach projects.

Home delivered meals are included in the State-wide health maintenance program in Rhode Island where cooking classes for male residents of public housing developments have also been initiated. A lunch wagon to deliver meals to the aged is part of a pilot project in Hawaii.

State aging units are also making efforts to assure that low income elderly receive an adequate, nutritious food supply in as dignified a manner as is possible.

The New Jersey State plan provides that consumer education be given in conjunction with each funded nutrition project. Similar instruction is mandatory in all Title VII programs in Delaware. Such education is considered a component in appropriate projects in Oklahoma and, in Rhode Island, attempts are being made to provide training to the aged in food purchasing and preparation as well as in the elements of a balanced diet. The Rhode Island State Division on Aging is working with all District Nursing Associations which provide programs in preventive health care to disseminate material on food and diet. In addition, the agency is cooperating with the U.R.I. Agriculture Extension Division in a project involving area-wide teams who help citizens with dietary needs, cooking, purchasing and preparing of food.

Many States, including Maryland and Mississippi, are including nutritional counseling personnel as integral components of more far reaching assistance projects. In Florida, workshops are being conducted for teachers who will instruct the elderly in nutrition, and in Georgia, cooperative extension workers are used as teachers on a limited basis. A much larger effort is underway in Nevada, where county extension aides are educating older persons in areas such as basic nutrition and better ways to cook commodity foods. Homemaker health aides in Alaska are conducting a limited amount of nutrition training in the homes of the aged.

Fewer than one-fourth of the responding units reported any attempts to improve the enforcement of high nutritional standards or consumer "aids" to buying.

A New Mexico Committee on Consumer Issues is working closely with the Federal Office of consumer Affairs in the area of nutrient and ingredient labeling, while the Rhode Island unit suggests that standards in that State are already equal or superior to Federal requirements. The Puerto Rico Consumer Service Administration has been made responsible for overseeing the maintenance of high nutritional standards in that Commonwealth. A special government-private task force in New York helped to study appropriate standards of labels for inclusion in that State plan. Training for institutional surveyors in Florida has been expanded to include more information on nutrition and in Rhode Island, a statewide nutrition task force has been created to ensure a high level of enforcement.

Research and demonstration/pilot projects to help solve nutritional problems of the aged are being carried out in approximately one-half of the States responding.

Some areas, such as Georgia, are attempting to geographically pinpoint high priority areas where concentrations of needy elderly are located. Demographic characteristics of the elderly who require nutrition assistance is the subject of research in New Mexico, while the Florida Division of Health is making a nutrition status evaluation of seasonal farm workers to determine in part the effect of diet on aging. In New York, a survey has been developed to research outreach and referral needs of more than 25,500 citizens over age 65 who reside in high rise housing in the Syracuse area.

Connecticut has financed a planning grant to study methods for including counseling in all programs. A Statewide social indicators study, performed by the Arizona Division for Aging, included many questions designed to provide insight into nutrition problems of that State's elderly citizens.

Conclusion

Overall action at the State level has been encouraging both in terms of State participation in Federal Nutrition Programs, and by individual efforts to meet the special needs of the individual states' elderly populations. A variety of programs and services are now being offered or planned to make food and hot meals more accessible to the elderly who need such assistance.

RESULTS OF SURVEY ON ACTION BY STATE UNITS OF GOVERNMENT

NUTRITION

RECOMMENDATION NO.		ADVOCACY			FUNDING	TRAINING	SUPPORTED LEGISLATION			INITIATED NEW SERVICES	DISSEMINATED INFO TO:		RESEARCH
		TESTIMONY	MEDIA	LITIGATION			FED.	STATE	LOCAL		GOV'T.	MEDIA	
I.A.	Allocate Funds to Rehabilitate Malnourished and Prevent Malnutrition	5	6		10	2	7	4		8	8	7	6
I.B.	Allocate Funds for Research on Influence of Nutrition on the Aging	1	1		2		3				3	3	4
I.C.	Set Up Pilot Programs for Evaluation of Nutritional Status of Elderly	2	2		9	2	2			2	5	6	4
II.A.	Enforce High Standards for Food and Nutrition Services in Institutions and Home Care Agencies	2				1	2			1	4	4	
II.B.	Require High Level of Performance from State Government Enforcement Agencies	3	2				1	1			2	2	
II.C.	Provide Financial Assistance to Non-Profit Organizations						1				1	2	
II.D.	Require Nutrition Services and Nutrition Counseling for all Health Delivery Services	4	2		3	2	2	1		1	7	7	1
III.	Designate Resources for Nutrition Education of Consumers	3	3	1	4	3	4	1		5	5	8	1
IV.A.	Must Offer Options for Meals, Stress Favorable Values in Group Feeding	5	4		5		5	3	1	7	7	7	2
IV.B.	Require Services for Feeding of Elderly in Federally-Assisted Housing Developments	5	2					1		1	8	7	
IV.C.	Meals Should Meet 1/3 Nutrient Needs of Individual	2	1			1	1	1		2	5	5	
IV.D.	Require Provision of Facilities for Food Purchase and Meal Preparation in each Household	1	1		1					1	3	2	
IV.E.	Encourage Community Agencies to Provide Facilities and Services	6	8		8	2	3	1		9	6	8	
V.	Federal Government Responsible for Making Adequate Nutrition Available to all Elderly Persons	4	3		4	1	6	2	1	5	4	5	1

V.A1.	Minimum Adequate Income Available to all Elderly	4	4			5	3		1	6	8
V.A2.	Strengthen Existing Food Programs		1							2	2
V.A3.	Use of Food Stamps for the Purchase of Meals	2	1							2	2
V.A4.	Food Stamp Program Must Conform to USDA Low-Cost Food Plan	7	1						1	4	2
V.A5.	With Fixed Incomes, Recipients of Social Security Should be Eligible for Self-Certification for Food Stamps	1	1							1	1
V.A6.	Food Stamp Applications Sent with Social Security Checks and Stamps Sent Through Mail	1	1	1	1	1	2	1		4	3
V.A7.	Encourage Purchase of Food Stamps, Provide First Food Stamp Allotment Free	2	1		1					3	2
V.B1.	Establish Equivalent of National School Lunch Program for Elderly	2	3		2		2	2	2	2	5
V.C1.	Recruit, Train Elderly to Work in Nutrition Programs	2	2		2	3	2	1		5	3
V.C2.	Use Social Workers to Get Client Acceptance of Nutrition Program Services	6	1		1	1	2	1		4	4
VI.A.	Require More Personnel and Funding to Insure Safety of National Food Supply	1	1				1			3	2
VI.B.	Establish State Requirements that Meet Federal Standards	6	1				2	1		2	3
VI.C.	Ingredients of any Processed Food Should be Made Available to Consumer	2	1				1	1		4	5

ACTION BY STATE UNITS OF GOVERNMENT

PHYSICAL AND MENTAL HEALTH

Conference recommendations on health care drew a good response from state agencies. Information on action in the area of physical and mental health was provided by 32 states. Five responses came from State agencies on aging and, importantly, 27 replies were from state health departments which are directly charged with responsibility for the activities dealt with by the Conference recommendations. The recommendations in only two other Sections drew as great a response from the state agencies as those in the area of health. The Education recommendations received responses from 31 education agencies but these were divided among public education departments, higher education agencies, and a few individual universities. The Transportation Section drew 40 responses. Thus, the state responses on health care present a broad picture of state health agency actions on these problems.

In general, it can be said that the most extensive action has been in providing various health care services for the elderly, and in educational and training programs for health care personnel. Less direct action has been taken on some recommendations because the action proposed was directed at the National level.

Health Care Needs of the Elderly

The responses on the first two recommendations of the Section seemed to cause two difficulties for the responding health agencies. First, the responses did not directly answer that portion of the proposal calling for health care of elderly as part of a comprehensive plan for all population groups. Presumably, State health officials see this as a matter of National policy. At the same time, the second part of the resolution concerning the immediate and special problems of the aging drew more direct and positive replies. State health officials were able to point to new programs aimed specifically at elderly needs that fall within their scope of activities and responsibilities.

Half of the 28 state health agencies reported a variety of new services for the aging or delivery system changes. Five states reported new programs to screen the health needs of the elderly population. California said it is developing a new nutrition standards proposal. Colorado has started a new health care program for the elderly in rural areas to screen for chronic diseases, provide counseling, and follow up management of chronic diseases. Nevada has established a new podiatry clinic in Reno. The Alabama Department of Public Health has initiated and funded new Medicaid, intermediate care facilities and home health aides programs. The Connecticut Department on Aging said a home care program has been funded for that state. North Carolina and Illinois also reported action on home health services. The Massachusetts Executive Office of Elder Affairs said new home care services were being planned.

On actions taken on delivery systems, the Florida Division of Health reported that it had requested \$5 million in State funds to establish county health departments for health care for the aged. Maryland reports it has funded areawide health care programs in the lower Eastern shore part of the state. Alabama is conducting research to improve the organization and delivery of health care services and New Hampshire has reorganized its State Cancer Commission. Minnesota is reorganizing its Department of Health.

In addition to providing new services and the actions taken on delivery systems, the recommendations also drew advocacy support from both agencies for the aging and State health departments. A number of states also reported that research was being carried out on matters with which the recommendations were concerned.

Education, Training and Research

Significant activity at the State level has occurred in the areas of education, training and research regarding the health needs of older people. The Section recommendations in these areas were comprehensive, including education in aging, use of older persons in such programs, curriculum development, in-service and professional training, and need for funds to support education and research.

Twenty-four of the 32 state agencies reported action in these areas, with the greatest proportion of the activity being training programs for health personnel in the care of older people. The training activities covered a wide range. The largest category was training personnel for work in nursing homes and other long-term care facilities. South Carolina has professional training programs in home health services while Colorado and Illinois reported both in-service training and professional development programs. The Iowa State Department of Health has established a training program in recreational and occupational therapy for the elderly.

Some institutions of higher education have also been actively involved in addressing the health needs of older people. The Maryland Department of Health and Mental Hygiene is working with the State University on several projects. One is establishment of a Center for Aging Studies to be used by all types of service personnel. The health department and the university are also working on a program to include a geriatric curriculum in the School of Nursing. In Alabama state health officials and the University of Alabama have worked together to set up courses and training in elderly health care through the School of Health Occupations and Allied Resources. The University's Center for Continuing Education, aided by the health department, received a Federal grant of \$281,400 for training personnel in long term care facilities. The training priorities are pharmacy consultants, nursing service, dietary service, and activities supervisors.

The elderly themselves have been brought into an active role in some health education programs. In Connecticut, the elderly are included in the teaching of a Statewide pre-retirement program while some other states reported the use of older persons in educational and community service activities.

Research, while going on in several states, is a less frequent activity than education and training. The Connecticut Department of Aging reported research in home care and Geriatric Centers. The New Hampshire Division of Public Health has a continuing study of nursing home operations. Alaska reports a comprehensive health study on aging is being carried out. The Arizona Department of Health is engaged in research to establish a model health care center. This center would be used for education, research, demonstration and developing innovative ways to use personnel and deliver health services.

From the responses it can be concluded that these activities, particularly in the areas of education and training for the health care of older people, are rather widespread among the States. With this apparent State interest in education and training, it seems an appropriate area for expansion of State involvement in meeting elderly health needs. There is less evidence of State activity on aging research.

National Health Plan and Medicare

The recommendation to establish a National health care plan and, in the interim, improve Medicare services, generally drew mixed response. Reports of action came from five agencies on aging who performed advocacy functions (legislative testimony and public information activities). Less action was reported by the State health departments. Since establishment of a National health plan and the operations of Medicare are responsibilities of the National government, the lack of significant action from State agencies is understandable. One factor should be kept in mind, however. Establishment of a National health plan, regardless of the specifics of any particular proposal, could be expected to significantly effect the policies and operations of State health departments.

Ombudsman

The concept of ombudsmen to assist the elderly with the protection of their rights regarding the provision of health services has been acted upon in a variety of ways. A few States reported that they had ombudsman programs in operation. In Wisconsin there is a nursing home ombudsman project responsible to the Lieutenant Governor. South Carolina has a nursing home ombudsman in the State Commission on Aging and New York has a similar arrangement. Idaho has a pilot project in the office of the Attorney General while the Maryland Commission on Aging reports it has proposed a State demonstration project to evaluate the possibilities of such a program in Maryland. Thus, the concept of the health ombudsman for the elderly has gained acceptance at the State level and is an activity that might be promoted in other states.

Conclusion

In conclusion, the responses show a willingness on the part of State health agencies to introduce new health care services for the elderly and, in some cases, to make or explore changes in delivery systems. The actions, however, fall short of many of the service-delivery recommendations of the Conference. Once again, the ability of a State to make significant headway in these areas is largely dependent on the leadership provided by programs which are administered on the National level.

RESULTS OF SURVEY ON ACTION BY STATE UNITS OF GOVERNMENT

PHYSICAL AND MENTAL HEALTH

RECOMMENDATION NO.	ADVOCACY			FUNDING	TRAINING	SUPPORTED LEGISLATION			INITIATED NEW SERVICES	DISSEMINATED INFO TO:		RESEARCH
	TESTIMONY	MEDIA	LITIGATION			FED.	STATE	LOCAL		GOV'T.	MEDIA	
I. Provide Health Care for Aging as Part of Health Services Giving Special Attention to Aged	2	4		3	8	1	3		11	8	11	1
II. Develop Coordinated Delivery System	1	3		4	1		3		4	4	6	2
III.A. Establish Comprehensive Health Care Plan	1	1					2	1			2	
III.B. Expand Legislation and Financing of Medicare	7						1					1
III.C. Provide Partnership in Delivery of Services to Assure Uniform Benefits	3									1	1	1
III.D. Centralize Responsibility for Standards and Controls	1	1		1			1			2	3	
IV. Provide Information on all Aspects of Aging	2	4		1	6				4	3	3	
V.A. Emphasis on Including Curricula on Physical, Mental, and Social Aspects of Aging	1	1	1	2	11				1	3	6	
V.B. Develop Specialists in the Care of the Elderly	1	2		2	8	1	1			3	3	1
VI.A. Emphasize Funding of Direct Services	1			1			1		1			2
VI.B. Assemble and Coordinate Research Findings into Service Programs				1	1				1	2	3	2
VI.C. Increase Funds Available for Basic Research	1			1			1		1	1	1	1
VI.D. Establish Gerontological Institute	1						1					
VII. Establish Center for Aging in National Institute of Mental Health	1						1					

- 541 -

VIII.	Authorize Appointment of Commission on Aging, Including Committee on Mental Health							
IX.A.	Appoint Nationwide Interdisciplinary Committee to Protect Rights of Individual	1	1		1		1	
IX.B.	Appropriate Funds for Study of Individual's Rights in Relation to His Needs for Health Service	1	1	1		1	2	1
IX.C.	Promote and Encourage Establishment of Ombudsman Services			1		2		1

ACTION BY STATE UNITS ON GOVERNMENT

PLANNING

Introduction

Forty-two agencies, representing thirty-five states, responded to the questionnaire seeking information on action taken to implement the recommendations of the Planning Section. Thirty of the responses were received from State aging units.

Citizen Participation

Activities designed to open up the decision-making process to consumers and non-governmental parties were reported by nearly 90 percent of the responding units. In most cases, significant efforts have been made to provide for involvement by private citizens in the planning and execution of government programs.

In California, for example, a State Advisory Council on Aging has been formed. A goal of 200 board members, supported by 10,000 participating members has been set for the organization. Special advisory committees, boards or consumer councils have also been established in Illinois, North Dakota, Delaware, Rhode Island and Mississippi.

Consumer representatives must now compose at least 51 percent of the membership on committees dealing with home care projects in Massachusetts. The New Jersey State Office on Aging reports use of Advisory Councils connected with existing county Offices on Aging, and requires establishment of similar councils in all new Offices on Aging and in demonstration projects. Involvement by volunteers, the elderly and private organizations on area planning committees and agencies is an important part of programs in Missouri, while in Iowa the opinions and advice of elderly "consumers" has been sought through a series of regional conferences on aging. Committees which include elderly and non-government members have been created in various Puerto Rican municipalities so that community residents can become involved in the decision-making process.

Aging units in the States have also taken steps to involve, in the planning process, representatives from racial and ethnic minority groups, middle-aged and young citizens, as well as professionals, para-professionals and aging specialists. The New Mexico Advisory Committee on Nutrition includes nine professionals, nine representatives of service providers and ten consumers. Both urban and rural sections of the State are represented, along with New Mexico's Indian, Spanish, Black, and "Anglo" population.

A concerted effort to achieve widespread representation is being made by the Idaho State Advisory Committee on Aging which is urging pertinent State governmental agencies and local government units to adopt the concept. Involvement by all sectors of the population is an on-going policy in New Jersey and New York, while units in Illinois and Georgia report that through the implementation of Federal guidelines, proper representation is being achieved.

Special Groups

In addition to recognizing citizen interests in the initial planning process, many States have made progress in directing aged programs to those most in need -- minority and low-income elderly.

In Mississippi, special efforts are being taken to locate Title VII (Nutrition Program) projects in areas where minority and low-income populations are concentrated. According to the Georgia unit, racial composition is a major factor in designating priority areas, and because all State programs are funded on the basis of documented need, the elderly poor are those who are primarily served. Three area-wide projects, funded this year in New Jersey, are directed toward alleviation of the major concerns of the elderly poor, aging and aged Blacks and Spanish-speaking aged in both rural and urban sectors. In Nevada, top priority for project funding is being given to those programs which affect the elderly poor, and projects are now being planned to serve the State's Blacks, Indians, and Spanish-speaking minorities.

Research has been conducted in Iowa to locate disadvantaged minorities and pinpoint their specific needs. The concerns of the elderly poor are also being given priority in Missouri's program planning and in Oklahoma, where funding is now aimed primarily at this target group. In Alaska, additional attention is being given to the concerns of elderly Eskimos and Indians, while in Puerto Rico, a pilot project has been undertaken to find ways of reaching the disadvantaged aged. In New York, significant programs for the elderly poor are operational under OEO auspices in White House Conference planning regions #5 and #6.

In order to assure that minorities are adequately represented in program administration, an equal employment opportunity action plan has been developed in Iowa and the Delaware State Bureau of Aging plans to give priority in hiring to ethnic minorities. Equal opportunity training is being provided to government staff in Idaho's aging programs and an affirmative action plan has been drawn up to assist local groups.

Planning Processes

Partial implementation of Conference recommendations calling for improved planning mechanisms at the State, multi-county and

local levels was reported by more than 90 percent of the respondents.

In several States, such as Delaware, Oklahoma, Louisiana and Rhode Island, responsibility for coordination and formulation of planning is now centered in a specific governmental entity. A 1969 New Mexico law which established the State Agency on Aging is expected to be amended this year to strengthen the unit and provide official authority for the body to set up local offices and agencies. In Georgia, the former Commission on Aging has been placed under the Department of Human Resources, elevated to "Office" level and strengthened as an advocate agency. With this reorganization, the agency is now serving as a catalyst to promote comprehensive planning:

Regional or multi-county planning and execution of aging projects is being widely promoted. In California, 24 planning areas have been created while 20 Regional Councils on Aging have been funded in Missouri. Other areas seeking to support the regional concept by funding of area-wide model projects, operating programs or technical assistance are Puerto Rico, Idaho, Mississippi, Minnesota, Maryland, New York, Massachusetts, Connecticut, Arizona, New Mexico, North Carolina, New Hampshire, Oklahoma, Nebraska, Delaware, South Carolina, North Dakota, and Idaho.

Planning on the local level has also received attention. The Idaho Office on Aging is cooperating with locally-oriented, Council of Governments' planning groups. In West Virginia, local officials are receiving training in planning procedures and consultation from the State Commission on Aging. A comprehensive, local plan is required in New York before funding can be approved for any projects. The Georgia Office of Aging is working with the Area Planning and Development Commissions, established by the State to deal with area-wide economic, industrial and social planning and development. Training for directors and staff of area planning agencies has been provided in Nevada and, in Delaware, a sub-state level planning office has been created.

Coordination

Significant attempts to improve coordination in planning and executing projects has been launched. A large majority of the questionnaire respondents reported that action had been taken to coordinate Federal, State and local attempts to solve the problems of the aged.

For example, in New York, an interdepartmental committee has been established, and in Maryland, a State clearinghouse now reviews and coordinates plans which receive Federal funds. Interdepartmental and inter-agency workshops are part of the operation of the New Mexico Commission on Aging. This unit also

conducts conferences with Federal representatives on the regional, State, and local levels to assure that programs are operating at maximum effectiveness.

The Idaho State Planning and Community Affairs Agency will soon be developing an innovative project with the State Office on the Aging to insure close liaison and access of the agency task forces to regional Councils of Governments. In Missouri, the twenty new Regional Councils on Aging are attempting to coordinate overall agency activities with the efforts of governmental, non-governmental, private and voluntary groups at all levels.

In California, a single State agency has coordination and technical review responsibility for all directly-funded, Federal grants to localities. In Rhode Island, an area-wide task force on aged interests includes not only personnel from the Division on Aging, but also other State personnel from departments with responsibility for planning activities.

In a related attempt to improve coordination, several States require that copies of planning and priority strategies for elderly programs be submitted to public officials who have direct roles in the budget or appropriations process. Such links between budget and planning are on-going policies in New Jersey and Puerto Rico and similar action is planned for implementation in Delaware. In Mississippi, copies of elderly program strategies are submitted annually to the State Budget Commission. Information briefings are regularly held in Nebraska for members of the State legislature and Congressional delegates. Additional information is supplied on request.

Means to assure accountability for program planning and performance have been initiated in many States. Mechanisms for such accountability are outlined either by law or administrative policy in Nebraska, Rhode Island, New Jersey, New York, Mississippi; Missouri, New Mexico, Hawaii, Wisconsin, South Carolina, and Illinois. Minnesota is developing comprehensive evaluation and monitoring tools and the North Dakota State plan has been amended to provide for such aids. A standard evaluation procedure has been established at the State level in Idaho and, in Connecticut, priority reports and evaluations are required on projects. In Nevada, semi-annual operations reports are mandatory. Regional projects are evaluated at the State level and progress notes are then issued back to the regional program bodies.

Other Areas

More than one-half of the responding units reported that action had been taken on the Federally-directed recommendation that urged creation of a special, aged advocate planning office within the Executive Office of the President. Most of the State activities were limited, however, to advocacy, testimony

or informational action. State support was also given to the concept that the Administration on Aging should be made an independent agency within HEW Units in Iowa and Illinois formally urged their Congressional representatives to vote favorably on legislation implementing this recommendation.

Varied progress was reported on efforts to assure that programs benefiting the elderly will be continued, rather than de-emphasized, under General Revenue Sharing. Such protection has been written into Wisconsin statute and the Indiana Commission on the Aging and Aged has promoted efforts to secure local government allocations for "social services for aged." The New Mexico aging unit has alerted State, county and municipal officials to the unmet needs of elderly citizens in each area and has urged the government groups to remember the elderly population when setting priorities for use of revenue shares. In Illinois, pertinent, specific "references" in the Revenue Sharing Act are being called to the attention of local governments.

Conclusion

Overall, significant action appears to have been taken (with even better expectations for the future) regarding attempts by State governments to better plan and coordinate their activities to meet the specific needs of their elderly population. Both horizontal and vertical planning and coordination, as reported, indicate that the government resources available for programs for the elderly are being made responsive and responsible to the target populations for which they are intended.

RESULTS OF SURVEY ON ACTION BY STATE UNITS OF GOVERNMENT

PLANNING

RECOMMENDATION NO.		ADVOCACY			FUNDING	TRAINING	SUPPORTED LEGISLATION			INITIATED NEW SERVICES	DISSEMINATED INFO TO:		RESEARCH
		TESTIMONY	MEDIA	LITIGATION			FED.	STATE	LOCAL		GOV'T.	MEDIA	
I.	Provide Opportunity for Involvement of Non-Governmental Sector and Consumers in Making Decisions	3	3		7	1	3	5	3	4	12	15	3
II.A.	Create Separate Entity for Planning Within Executive Office of President	3					4				5	5	
II.B.	Retain Administration on Aging Within Department of HEW, But as Independent Agency	6	2				4				6	7	
II.C.	Create Interdepartmental Committee With Representation at Secretarial Level	3	1				1				3	3	
III.A.	Need for Planning in Aging Within Each State Government	6	2		7		3	7	1	5	12	10	1
III.B.	Establish Separate Entity for Planning in Aging Within Each State Government	3	1		6		1	6	1	4	7	6	1
III.C.	State and Local Levels Should Parallel Planning at Federal Level	6	2		16	7	1	1		7	10	13	2
III.D.	Encourage Comprehensive Planning at Local Level	7	1		5	5	2	1		7	7	8	1
IV.	Provide Technical Assistance and Consultation in Planning in Non-State Jurisdictions of U.S.				1		1			1	2	2	
V.A.	Support of Planning at State and Local Levels from Federal Government	3	1		16	2	3	1		1	7	8	
V.B.	Coordinate Planning at State and National Levels, with Priorities at the Local level	4			17		3	2	1	3	8	10	1
V.C.	Require Specific Planning for Federal Planning Grants with Implications for Human Services	6	4		3					2	11	7	
V.D.	Establish Mechanism for Coordination of Planning at all Three Levels of Government	3			3		1			2	8	7	

V.E.	Set Aside Federal Funds in the Form of Block Grants for Long Term Planning in Aging					1				1		1		
VI.A.	Increase Planning Mechanisms Efforts to Make Programs More Responsive to Needs of Aged	5	1		2	1	1			3	7	7	1	
VI.B.	Develop Expanded Programs for the Elderly	3	1		6		1	2		6	2	4	1	
VII.	Assure Involvement of Older Persons in the Planning Process	4			4		1	1		2	6	7		
VIII.	Provide Protection for Elderly if Federal Revenue Sharing is Enacted	5	4	1	3		2	4	3		7	8		
IX.A.	Eliminate Racial and Ethnic Discrimination of Minority Elderly	4	1	1	3	1	5	5	4	4	8	11	1	
IX.B.	Give Top Priority to the Needs of the Elderly Poor	4	3	1	8	1	3	8	3	7	11	12	4	
X.A.	Federal Planning Organization Must Annually Review and Report on its Proposals	4	1	1		1	1	1	1	1	5	6		
X.B.	Review of Proposed Legislation by Federal Planning Organization	3	1	1			1	2	1		3	3		
X.C.	Administrative Agencies Must Annually Evaluate and Report on Their Programs	4	4	1	2	3	1	2	1	3	8	8	2	
X.D.	Insure Programs at State and Local Levels Conform with Stated Objectives of Program	2		1	1	1	2				4	3		
X.E.	Include Existing Private Resources in all Planning	2	2	2	4	2	2	2	1	2	6	9		
XI.	Submit Copy of Planning Strategies to Elected Officials Involved in Appropriations Processes	3		1	1				5	2	1	10	6	1
XII.	Reordering of Priorities to Increase Commitment of National Resources	7	3		3	1	4	6	3	1	11	11	2	

ACTION BY STATE UNITS OF GOVERNMENT
RESEARCH AND DEMONSTRATION

Replies to the Conference's recommendations in the area of research and demonstration were received from 40 units representing 34 States and the Commonwealth of Puerto Rico.

Many institutions reported that valuable advancements have been made toward implementation through a variety of actions. In some cases states acted to further or accelerate Federal action where the State was a partner or felt it necessary to assist but lacked the available resources.

A group of respondents chose to work toward adoption of the recommendations at the National level by distributing information to the public or government and by advocating passage of pertinent legislation. For example, in New Mexico, the Joint State Committee on Legislation to Benefit the Elderly contacted Congressmen to urge adoption of the recommendation aimed at establishment of a special office within the Federal Executive Branch to plan and coordinate projects dealing with the aged.

A final category of respondents took direct action to adapt Federally-directed proposals to problems at the State level. The result was a variety of solutions to similar situations where research and demonstration activities were applied to dealing with the problems of the elderly.

Institutional Research

The Conference's recommendation calling for establishment of a National Institute of Gerontology led several respondents to initiate comprehensive research programs in their State.

The Commission on Aging in New Mexico is urging the State University to develop an aging center and has informed the legislature of the need for funds and action to create a joint university facility. In Maryland, application has been made to establish several geriatric centers at Baltimore City Hospitals, and the Indiana Commission on the Aging and Aged is exploring the feasibility of creating such an institute at the State University. Delaware is also planning the establishment of a major aged research and training facility at the State institution for the chronically ill, while the University System of Georgia Regents report that several programs of research, instruction and public service in gerontology are planned or operating.

In North Dakota, college and university personnel have met to promote increased research activity and the Puerto Rico Gericulture Commission is now fostering the establishment of an institute at the University of Puerto Rico School of Medicine. Specialized programs dedicated to gerontology are also underway in Nebraska, Oregon and California.

Advances are also being made toward the integration of geriatric research into multi-disciplinary, multi-institutional environments such as universities and special research agencies, an area of advancement recommended by the Conference.

With Federal support, courses in gerontology have been instituted at the University of Arkansas at Little Rock, while similar programs are being developed for colleges and universities in Colorado. In Nebraska, a policy decision has been made to move toward creation of multidisciplinary research and training, and the Georgia Regents have recommended the concept to schools within their jurisdiction.

Significant progress has been made in Hawaii. In an effort to promote planning aimed at integrating gerontology into a wide range of course material, the Gerontology Program staff at the University of Hawaii is now conducting a survey to determine the research, training and service interests of 1,500 faculty members in various academic departments. In a second interdisciplinary project, workers in the State Senior Center, operated by Honolulu Community College, cooperated with personnel from the Gerontology Program, University of Honolulu, in designing and implementing an AoA-supported research project dealing with independent living for elderly residents in Honolulu public housing projects. In addition, consideration is now being given to establishment of an intermediate care facility at Leahi Hospital which would be operated by the University of Hawaii and would conduct research and training in geriatrics as well as providing vital health services.

In Connecticut, the Department on Aging was instrumental in the establishment of a geriatric assessment unit at New Cook Hospital in Hartford. Here, both training and interdisciplinary studies will be emphasized. Central Connecticut College, in cooperation with the Department of Aging, is also promoting multidisciplinary activities in gerontology by conducting a series of seminars on aging, to familiarize the university community with problems of the elderly and stimulate incorporation of pertinent material into other curricula.

Special Groups

In response to the recommendation that attention be given to recruitment and training of minority group students in research, action, where reported, was varied. Nebraska officials have formulated an affirmative action plan and, like the Georgia Regents, have extended the plan to the State's research facilities. Training in career opportunities, aimed at minority and ethnic groups, has been initiated in Tennessee while gerontological research training for minority groups is being conducted in South Carolina through the sociology departments of predominately black schools.

Six respondents reported action on the recommendation that funds for research training and demonstration should be allocated to problems of minority groups in proportion to the representation of that group in the total population. In North Dakota, such financing was involved in an areawide model project which included Indians, and, in Mississippi, a Gulfcoast model project seeks to involve all racial and ethnic groups on an areawide basis.

The Nebraska Commission on Aging reports that planning and allocation priority areas in the State's nutrition program for the elderly were implemented on a proportional basis, and the State of Minnesota also recognized the principle of proportional financing in funding planning grants under a nutrition program benefiting the aged.

Many respondents suggested concrete advancements had been recorded in giving high priority to the recruitment and training of women in the field of aging. Seven units answering the questionnaire reported measures that had been taken to assure that women are represented on bodies which have responsibility for the allocation of research and training funds.

Where efforts are being made in increasing the involvement of women in aging programs, recruitment is often not limited to entry level positions, but also includes jobs at middle levels of operation. Units in Mississippi, New Jersey, Nebraska and Georgia maintain that the participation of women on elderly program staffs has been an accepted policy for some time. Five States report that they have hired additional women workers since the WHCOA. Women now compose two-thirds of the professional staff in gerontology at the University of Hawaii.

In Oklahoma, funding has been approved for an educational program and counselling for women, while in Mississippi and Idaho, active recruitment programs aimed at attracting women workers are underway. Fifty percent of the students now involved in the gerontology program at the University of Nebraska are women.

Other Areas

Limited action has been taken to "adapt" Federally-directed recommendations at other levels of government. The State of Rhode Island has followed up a post White House Conference resolution supporting a special office on aging, by working to promote the establishments of a separate Department on Aging within the State. Officials in Nebraska and Idaho report that provisions have been made to assure that valuable nutrition demonstration programs under Title VII will be extended, and the Georgia Regents suggest that the Conference's recommendation for continuing successful pilot programs is standard policy in the operation of local projects where funding is available.

Conclusion

Research and demonstration at the State level reflects increased activities in education and curriculum development, and in dealing with the special needs of certain minority groups. Cross-jurisdictional cooperation remains yet to be universally applied in all jurisdictions, but progress to date and the future efforts at Federal-State-local coordination of programs for the elderly, will see continued expansion of research and development efforts at the State level.

RESULTS OF SURVEY ON ACTION BY STATE UNITS OF GOVERNMENT

RESEARCH AND DEMONSTRATION

RECOMMENDATION NO.		ADVOCACY			FUNDING	TRAINING	SUPPORTED LEGISLATION			INITIATED NEW SERVICES	DISSEMINATED INFO TO:		RESEARCH
		TESTIMONY	MEDIA	LITIGATION			FED.	STATE	LOCAL		GOV'T.	MEDIA	
I.	Establish National Institute of Gerontology	2	1	1			7	2		1	4	2	
II.	Create a Position Within the Executive Branch to Develop Programs for Aged	5	1	2		1	3				4	5	
III.A.	Increase the Federal Funds Appropriated for Research	3	1				5	1			3	4	
III.B.	Appropriate 3.5% in Additional Funds for Programs in Interests of Older Persons						1	1			2	2	
III.C.	Continue Federal Support of Research and Training in Separate Departments or Agencies	1	1		1		3			1	1	2	1
IV.A.	Allocate Funds for Activities Relevant to Minority Groups in Their Proportion to Total Population	2	1		2						3	2	
IV.B.	Recruit and Train Minority Group Students to Become Researchers in Gerontology	2				2	1					1	1
V.A.	High Priority Should be Given to Recruitment and Training of Women	2	1		3	2				2	4	6	
V.B.	Represent Such Women in Bodies Responsible for Training and Research Funds	2	1							1	1	2	
VI.	Allocate Resources to the Administration on Aging for Collecting and Making Research Findings Available	1	1				4	1			2	1	
VII.	Allocate Federal Research, Demonstration and Training Funds, and Implement Adequate Staff	1	1		1		1				3	2	
VIII.	Assure Continued Operation and Funding of Federally Funded Demonstration Projects	3			1		1	1			5	1	2

ACTION BY STATE UNITS ON AGING

RETIREMENT ROLES AND ACTIVITIES

Information on action in the area of Retirement Roles and Activities was reported by 31 States, through their aging units, parks or recreation departments or education agencies.

Seven responses were from State aging units; fourteen were from State parks or recreation departments; and one State, Oregon, responded through its highway department. Responses from nine State education units were received and four States responded through two State agencies.

The variety of the agencies responding and their scattered geographical locations from the Eastern seaboard to the West coast indicate increasing attention and concern for the elderly regarding retirement activities. Additionally, it indicates in many instances that approaches to solving problems are being developed and coordinated across agency lines.

Meaningful Participation

The largest number of replies came in response to the four-part formulation of the basic philosophy of the Section. This encompassed attitudes, action and training programs permitting and helping the elderly to participate usefully in society, preparing them for new roles or resumption or continuation of former ones. All seven of the State aging units that reported indicated that their States have implemented this recommendation in some way. Seven of the education units, and six of the parks and recreation agencies responding indicated limited action along the lines of the recommendation.

The aging units' action included policy change where, in New York, a new Outreach Agency was established at Elmira in which senior volunteers are used to assist in the care of the elderly, and research is underway to plan and encourage community service and participation by the aged. Volunteer action programs, including RSVP and Foster Grandparents, were instituted and geriatric care was initiated for flood victims as well at Elmira. Home care units, including seven basic services managed and operated by the elderly, have been instituted by the Massachusetts Office of Elder Affairs. This office has also advocated for better transportation and barrier free housing in order to make community service accessible for the elderly.

Among the other States reporting action are Connecticut, Minnesota, Oklahoma and Nevada which funded and initiated programs of RSVP services, Title III programs with special emphasis on Development and Training Act programs (Nevada).

Parks and Recreation

Considerable awareness of the needs of the elderly was demonstrated by State parks and recreation services. Wisconsin reports it is "designing its parks to reflect the physical needs of both elderly and handicapped". One State park property contains a working farm for the use of school children, handicapped persons, and senior citizens. Oregon hires retirees for "work on landscaped areas in some areas" and offers consultive services to local governments. Alaska uses older persons for "cross-walk monitors".

At least half a dozen other States (New Jersey, Idaho, Utah, Colorado, Oregon, and Michigan) are employing the elderly in temporary jobs in parks and recreation facilities and operating Green Thumb programs for them. Michigan is extending its cooperation with the Green Thumb program for older citizens to include more counties and public agencies.

New Jersey issues free Senior Citizen passes for all State forests, parks, recreation areas and historic sites. The State of Washington has initiated a new Governor's Task Force on Aging, and appointed a State director for volunteer services.

Texas is using older volunteers and paid aides in Adult Basic Education; Utah has initiated a new service, "toy building for education"; and Florida reports "daily employment and training opportunities are offered increasingly to plus 45 older workers through regular ongoing Employment Service program of training and job placement."

Preretirement Programs and Counseling

Another area receiving considerable State interest was in regard to the recommendation calling for preretirement programs and counseling at private and public levels. This was to be performed under one public preretirement counseling service to be administered through district Social Security offices.

All seven State aging units that reported indicated that their States have taken some steps to implement this recommendation. At least ten of the other State agencies have also moved in this direction. In New York, a number of State government units provide preretirement counseling to employees and many public schools provide this activity through their adult education program. New York's Office of the Aging has conducted a conference with the Singer Company to encourage preretirement training at Binghamton.

Massachusetts conducted a preretirement conference for private industry aimed at instituting retirement training during working hours and reports that it is beginning "many governmental units and private industry preretirement planning programs". Its State Social

Security offices already offer individual preretirement counseling. Connecticut initiated a statewide preretirement planning conference for both the public and private sectors, inviting Social Security representatives to participate in planning. These two States were exceptions; the rest of the States apparently provide no counseling through Social Security. Washington State declares this to be a "Federal determination," and reports its State preretirement classes met "limited response."

Oregon issues retirement booklets for those reaching 60. Inter-agency conferences and communications were sponsored by Utah and Florida.

Michigan is conducting research into the needs of older persons with the aim of incorporating programs for the elderly as part of its total State recreation program. It also offers a six-month pre-retirement "administrative leave" for retiring employees. Nebraska offers public hunting and boating safety courses to the elderly as part of its continuing education policy.

Supportive Services and Community Involvement

The third highest number of responses (12) came in reply to two recommendations regarding the establishment of Federally funded supportive services for the elderly at State and local levels, and increased involvement in decision making by the elderly in community affairs affecting themselves and others.

At least four States (New York, Connecticut, Oklahoma, and Washington) have taken steps to develop models of funding for a network of supportive services, and one State, Connecticut, held workshops on social services for the elderly and formed two research committees on home care and geriatric centers. The Texas Division of Adult and Continuing Education is developing a guide to all available resources for adults in a community.

Three States (Florida, Nebraska, and Minnesota) stressed financial problems as limiting their ability to establish new social service programs, with Florida reporting that the Division of Family Service is "poorly financed and inadequately staffed", while other agencies consider older people "infeasible because of limited life left to them".

Regarding the recommendation calling for increased involvement of the aged in community activities, action in this area has not been as extensive as in policy development and planning activities. Connecticut has charged localities with responsibility for information and referral for the training of I & R agents, and for the establishment of a clearing house on legislation for the elderly to assist in coordinating political and other activities of the aged.

Programs for All Segments of Elderly Population

While the recommendation that programs should include all segments of the elderly population, including the physically or economically disadvantaged or handicapped, received the fourth largest number of responses (11), virtually no specific action beyond advocacy and the dissemination of information has been taken. Connecticut's Bureau of Physical and Vocational Rehabilitation is researching the needs of elderly disadvantaged sub-groups, and Minnesota senior citizen groups have made a similar efforts. Mississippi has funded Operation Mainstream (Title IB).

Training for Leisure

The recommendation that training, research and university programs relating to recreation and leisure encompass the requirements of older persons as an integral part of the curriculum also has received limited implementation. New York has run training courses at junior and community colleges and in adult education programs; Connecticut has run training workshops with many agencies, including the University of Hartford and Central Connecticut State College; the University of Minnesota has conducted several short term training programs; Kentucky has been involved in in-state training at Louisville and in programs offered at the University of North Carolina in Chapel Hill; Utah has initiated community education programs.

Federally Funded Community Multiservice Centers

Action has been limited regarding the establishing of community level multi-service centers for older persons. Connecticut set up a "design and fund seeking committee" and New York indicated that the establishment of such centers is under way, especially in the south eastern portion of the State.

Categorical support of services for the elderly also has received little action. New York reports successful direct liaison between the U. S. Department of Housing and Development and elderly flood victims at Elmira, and some success in separating services for the elderly from those of the general population by conferences with NYS/UDC designers. Connecticut is developing research geriatric centers with integrated multi-generational approach in research and planning with specialization for the aged where necessary.

Conclusion

The type of activity reported on the States appears to be a policy level which must occur prior to the actual development and implementation programs. This indicates that State activities in the future should reflect additional programs for the elderly and will be designed to meet their concerns and needs. More action to include the Elderly's needs in on-going, multi-generational programs appears to be warranted, especially in area of physical fitness and entry into professions as para-professionals.

**RESULTS OF SURVEY ON ACTION BY STATE UNITS OF GOVERNMENT
RETIREMENT ROLES AND ACTIVITIES**

RECOMMENDATION NO.		ADVOCACY			FUNDING	TRAINING	SUPPORTED LEGISLATION			INITIATED NEW SERVICES	DISSEMINATED INFO TO:		RESEARCH
		TESTIMONY	MEDIA	LITIGATION			FED.	STATE	LOCAL		GOVT.	MEDIA	
I.A.	Increase Meaningful Participation of Aged in Life	8	1		7	3	2	3	2	7	2	3	1
I.B.	Implement Programs at all Levels to Provide Opportunities for Community Service	4	2		5	2	2	2	1	3	3	5	
I.C.	Develop Mechanisms for Continuing Work of Successful Demonstration Programs	2	1		1	2	2	2	2	2	3	3	
I.D.	Make Community Services Accessible to Older Persons	2	1		4	1		2	1	2	2	4	
II.	Programs in the Field of Aging Must Realize Special Circumstances of Minorities and Handicapped	2			5	2				1	1	3	
III.A.	Expand Pre-Retirement Education	3	1		1	7		1		4	4	8	1
III.B.	Provide Preparation for Retirement Programs During Working Hours	2			1	3				1	2	5	
III.C.	Expand Social Security Offices by Offering Pre-Retirement Counseling		1							1			
IV.A.	Insure Supportive Services that Aged are Unable to Provide Independently	2	1		3	1		3			3	3	1
IV.B.	Develop Models for Supportive Services and Implement into Local Communities				1		1	1		1	1	2	
IV.C.	Provide Funds to Applicant Agencies and Local Communities for Supportive Services	2	2		3					2		5	1
V.A.	Encourage Involvement of Older People in Community and Civic Affairs	2	2			1		1		2	1	2	
V.B.	Promote Role Flexibility				1	2				1			
VI.	Appoint Committee of Delegates to Call for Re-Ordering of Nation's Priorities												

ACTION BY STATE GOVERNMENT UNITS

SPIRITUAL WELL-BEING

Introduction

Responses detailing actions taken in the field of Spiritual Well-Being were received from 14 States and the Virgin Islands.

The general nature of the Conference's recommendations in this area presented certain problems in reporting and evaluating progress which has been made in the States during the past year. For example, several recommendations call for action on the part of religious organizations rather than by official state agencies. Thus many activities which have undoubtedly been undertaken by independent religious groups are perhaps unknown to the governmental units responding to the Conference's questionnaire. Similarly, the "no action" responses reported by the states may actually mean that many of the recommendations did not call for State action, but were addressed to private spiritual groups.

In an unusually large number of instances, the activities reported by the States were centered around advocacy roles or the distribution of information to the public or other government bodies. These responses indicate that aging agencies in some instances are serving as idea "clearinghouses" for religious groups to which many of the Conference's recommendations are addressed.

In the States, attempts to assign implementation of these recommendations to specific units has been varied. Eleven of the 14 responses came from general commissions, boards, committees or offices on aging. One exception was in South Carolina where a special unit, the Churches and the Aging Committee, has been organized within the State Commission on Aging. The response submitted by this Committee showed a high level of advancement in implementation of the recommendations. In Massachusetts, the response was made by the Inter-Community Retirement Board, in Minnesota, by the Governor's Citizens Council on Aging and in Florida by a private organization headed by a Conference delegate.

Spiritual Outreach

Several states are undertaking to improve the quality and availability of spiritual counseling and chaplaincy services to home or institutionally bound older persons, as recommended by the Conference.

Montana is conducting training sessions to make personnel in long-term care facilities for adults more sensitive to the spiritual needs of their patients. A comprehensive task force on aging in Delaware is involved in development of similar training for those who deliver services to the aged. Financial assistance has also been provided in Connecticut where training has been initiated to instruct volunteers in ways of meeting the spiritual needs of the elderly.

Church workshops, organized in South Carolina, are providing professional instruction in matters of spiritual well-being and the government of the Virgin Islands has supported a seminar which brought together local clergy and consultants to discuss spiritual concerns. The Massachusetts Inter-Community Retirement Board is currently researching possible training for spiritual satisfaction.

Significant actions have been made to make religious services available to older persons in their home. Among the most active are the many churches in South Carolina which now sponsor visiting committees and elders who serve communion to those unable to attend church services. Tapes of sermons are also being made available to the home bound in this state. Volunteer spiritual workers are active in Minnesota, Missouri, Connecticut and Massachusetts.

Some progress has been made in assuring that continuing, regular chaplaincy services are available to the elderly in institutions. Four States indicated having taken action or showed interest in the Conference's recommendation that chaplaincy services be made mandatory for the state licensing of private institutions such as nursing homes. In the public area, the Hawaii Commission on Aging suggests that for several years the State has provided religious assistance to those in the State hospital or prison. Delaware will soon employ a total of five chaplains to fulfill the needs of patients in the State hospital.

Cooperative Planning and Action

The response to the recommendations calling for increased cooperation in the planning and execution of aged-related programs was significantly more extensive than in response to other recommendations. Substantial efforts are being made to bring together State governments, religious organizations, the elderly, and other community representatives in a partnership to attack the problems confronting America's older persons.

All states reported activities aimed at including the elderly in planning and implementing programs. In Mississippi, the size of various governmental task force groups has been enlarged to accommodate additional representatives from older segments of the population, and the Oklahoma government has adopted a new policy requiring increased representation of the elderly in all programming. In Missouri, older persons are now involved in Spiritual Well-Being Committees in each of the State's 20 regions, and training in community planning is being given to interested elderly citizens in Connecticut.

Several states have also developed programs directed at increasing the involvement of religious and professional organizations in the aged field. Resources and personnel of the Mississippi state government have been made available to church groups undertaking projects aiding the aged. The Delaware State Bureau of Aging has sent letters to church leaders, formally inviting increased cooperation and involvement in pertinent programs.

Iowa state officials have addressed various church groups, explaining possible roles which religious institutions can play in meeting the unique needs of older citizens. The State government has also distributed pamphlets to religious leaders and laity in an attempt to promote further involvement.

The South Carolina Commission on Aging has prepared and distributed two valuable booklets designed to increase the role of the church. The first, "What Churches Can Do for Senior Adults," discusses the importance of church involvement and lists ten specific areas in which direct help can be given to the elderly. Among those suggested are housing, service opportunities, adult education, food services and fellowship events. A second booklet, "Churches in Action for Senior Citizens," provides excerpts from reports by clergy throughout the State on activities which congregations are undertaking to help older Americans. The State also helped to sponsor a seminar dealing with "Religions and the Golden Years," which involved more than 300 older persons.

In the eastern Massachusetts diocese of Boston, a group of women representing 18 religious communities have organized to seek ways of aiding the aged and implementing the goals of the Conference. During the year since the Conference, these women have met regularly to draw up goals and are now seeking to establish a private, non-profit corporation dedicated to the needs of the aged. In Florida, a ministry to Spanish speaking people has been organized by the Christian Community Service of Dade County and the Department of Social Ministry of the Lutheran Church. Funds for the program are being extended by local church bodies and the United Fund.

Information Service Systems

Conference recommendations that religious organizations become more aware of services available for the aged are also receiving attention. In Oklahoma, work is underway on an inventory identifying religious services available to the elderly of the State and the Delaware State Bureau of Aging is also soliciting information on the activities of churches. A similar inventory of community services is being compiled in Iowa with the help of local church members. The Massachusetts Inter-Community Retirement Board is setting up an information and referral system between Board members, local agencies for aging and the State Office of Elder Affairs.

Although several states have provided limited support for the recommendation that the Social Security system should serve as a clearing house for inquiries by older persons, Connecticut reports that action has been taken to improve communications between Social Security offices and the State Department on Aging. The Hawaii Commission on Aging, in a follow-up investigation on the recommendation, reports that the Hawaii Social Security office is operating a referral system which deals with questions by recipients and directs them to the proper government or private organization for aid.

Several states reported funding or planning for establishment of multi-purpose community centers, while others addressed themselves to the Conference's specific recommendation which calls for increased participation of churches in the community center concept. In Missouri, several religious groups have pooled their resources to provide community center programs and day care centers. Pilot projects are underway in two Mississippi communities and in Minnesota, the Governor's Citizens Council on Aging reports that religious organizations are included as integral parts of all such community programs.

Church Advocacy Roles

In some areas churches have begun to serve as advocates for older persons' interests, a move urged by the WHCoA. The Iowa Council of Churches and the Iowa Catholic Diocese are working in regional meetings to promote the legislative and program needs of the elderly. In Minnesota, a joint religious legislative committee, composed of representatives from many church groups, is serving as a strong advocate voice for the aged, while the Missouri Office of Aging reports that spiritual groups in the state are performing a strong advocacy role, particularly in urban areas. In Delaware, an inter-denominational conference is being developed to study the problems of the elderly, and all-age discussion groups have been formed by churches in the Virgin Islands.

One recommendation which has received little attention is that calling for recognition of the individual's right to die with dignity. Ten of the 14 states reported no action had been taken by Church groups or the State government. Two respondents reported that some attention had been given to the problem, but no action has as yet resulted. In Connecticut, however, sensitivity training on the problem has been undertaken and the Virgin Islands' government has developed a related course, financed under Title III of the Older Americans Act, into the "psycho-social aspects of aging."

RESULTS OF SURVEY ON ACTION BY STATE UNITS OF GOVERNMENT

SPIRITUAL WELL-BEING

RECOMMENDATION NO.		ADVOCACY			FUNDING	TRAINING	SUPPORTED LEGISLATION			INITIATED NEW SERVICES	DISSEMINATED INFO TO:		RESEARCH
		TESTIMONY	MEDIA	LITIGATION			FED.	STATE	LOCAL		GOV'T.	MEDIA	
I.	Cooperate with Religious Bodies to Help Meet Spiritual Needs of the Elderly	4	4		2	2	1	1	1	2	3	5	1
II.	Provide Research and Professional Training to those who Deliver Services to Aging in Spiritual Matters	3	2		2	2				2	3	5	1
III.	Provide Financial Assistance for the Training of Persons Delivering Spiritual Services	3	1		1	2	1	1	1	1	3	4	1
IV.A.	Require that Institutions Caring for Aged Provide Chaplaincy Services	1	1				1	1	1		1	2	
IV.B.	Empower Gov't. to Supply Funds for Such Services Where Church Organizations Don't Have Financial Support	1	1		1	1	1	1			1	1	
V.	Establish System of Evaluation of Gov't--Funded Programs Serving the Elderly	3	2		2	1	2	3	2		3	4	3
VI.	Disseminate Information to Acquaint Elderly with Services Available to Them	2	4			1	2	2	2	2	4	6	
VII.A.	Meet Spiritual Needs of Elderly by Ministering to them in Conjunction with People of all Ages	6	4		1		1	1		2	3	3	1
VII.B.	Allow Older Persons to Share in Planning of all Programs Relevant to Them	7	2			1	2	2	1		4	6	
VIII.A.	Make Religious or Spiritual Consultation Available to Aged in their own Homes	1	1			1				1	2	3	2
VIII.B.	Assist Personnel of these Religious Bodies Lacking Financial Resources	3			2	1					1	3	1
IX.	Religious Organizations Should be Concerned with Spiritual, Personal and Social Needs	5	4		2	1			1	2	3	6	

X.A.	Religious Organizations Must be Aware of Other Agencies that Provide Ministry to Older Persons	3	3	3	2	2	1	1	5	8	2
X.B.	Organizations Designed for Benefit of Elderly Should Develop Channels to Agencies Helping in Spiritual Problems	2	2	1	1			1	2	2	1
XI.	Religious Bodies Must Exercise Strong Role in Meeting Needs of the Elderly	6	3		1	1			6	6	
XII.	Coordinate Efforts of all Religious Bodies to Develop Affirmation of Rights of Elderly	3	2	1	1	1	1		2	3	
XIII.	Provide Interfaith Community Programs for Aged Through Community Centers	5	2	4	1	1	1	2	3	4	1
XIV.	Affirm the Individual's Right to Die with Dignity	3	2	1	1				1	2	1

ACTION BY STATE UNITS ON AGING

TRAINING

Significant efforts have been made in many of the states toward implementation of those recommendations dealing directly with training programs. Increased activities to prepare professional, para-professional or volunteers for their jobs in aged work were reported by most of the 41 respondents representing 33 states and Puerto Rico.

However isolated progress was reported in adapting Federally-directed recommendations to the State level. In addition, while primary attention was concentrated on establishing more far reaching training projects, progress toward implementing those proposals dealing with advancement of minority interests and employment warrants accelerated action.

General Programs

More than one half of the respondents reported expansion of state training programs for personnel dealing with aged affairs and needs.

In Delaware, projects have been initiated which involve training in the mental health aspects of aging and the administration of nursing homes. The State Bureau of Aging is currently attempting to find funding for a TV pilot project providing instruction in nutrition and other aged concerns.

The Hawaii Commission on Aging has contracted with the University of Hawaii to conduct training workshops for geriatric workers in fields such as grants management, understanding the elderly and programming. The University's Gerontology Program staff has also carried out extensive in-service educational programs for the staff of two large chronic disease/geriatric facilities. In addition, the gerontology unit provides consultation and assistance to voluntary agencies and other organizations interested in programs for the aged such as the Salvation Army, the Health and Community Service Council and Queen's Hospital Mental Health Training Program.

A series of classes and seminars on aging, instigated by the Executive Office of Elder Affairs in Massachusetts, is attracting professionals, para-professionals and volunteers from many governmental agencies such as units dealing with housing, public health, public welfare, recreation and nutrition. New Mexico has established formal training programs in senior center management and diversional activities suitable for nursing homes patients, while Arizona is providing training in delivery of services to the aged.

The State University of New York in Albany is setting up a Master's degree program to train nursing home administrators and teaching staff for community colleges. Classes are scheduled to begin in the fall of 1973. Soon to be held in the State is a conference on the needs of the rural aged, with classes and transportation provided for elderly participants. The project's course content and planning was formulated after a careful study of the WHCOA recommendations.

Nutrition is one area where extensive advances are being made in training. Among the states which provide instruction in this field are Illinois, Vermont, Georgia, New Hampshire and Mississippi. Training in aged research has begun in the University of South Florida's Aging Studies Program.

Increases in funding for training purposes was also frequently reported by State units.

In Mississippi, financing has been received for an innovative Title III project aimed at the mass training of personnel via transmittal of audio and written information. The South Carolina Commission on Aging is providing instruction through service workshops, and a new staffing plan in Georgia includes personnel specializing in consumer education and training.

A high rate of favorable responses was also recorded on the recommendations that called for the earmarking of funds in service projects to finance training of project personnel.

California requires set aside funds for training in all Title VII and some Title III grants, while in Hawaii the earmarking concept is a prerequisite in all program budgeting. A policy change in Oklahoma has made training programs a mandatory part of all grant projects. The Idaho Office on Aging has developed a training program for all project grantees which includes statewide and regional workshops, as well as seminars. In Mississippi, area wide planning grants contain certain amounts earmarked for training in the needs and care of the aged, while New Hampshire, Nevada and North Dakota set aside instruction funds in their nutrition program.

Disadvantaged Minorities

Reports of efforts to implement the Conference's recommendations dealing with increased training and employment opportunities for disadvantaged or ethnic minority groups have been varied.

For example, seven respondents indicated that action had been taken to earmark funds for the recruitment of faculty and trainees' from disadvantaged groups while two units, the University of South

Florida and the Regents of the University System of Georgia, report that the recommendation has been implemented. Career counseling has been initiated for minority personnel in Oklahoma and an affirmative action plan on the issue has been drawn up in New Mexico.

Responses on the proposal that special financial incentives be offered to help in the recruiting of minority personnel were also mixed. This variety of action may be attributed in some cases to State civil service or equal opportunity legislation which forbids special inducements to any employee on a basis other than merit. The Mississippi Council on Aging reported, for example, that the state merit system prohibited such incentives. The University of South Florida Aging Studies Program suggested that, although concerted efforts are being made to recruit minority personnel, the adoption of special financial incentives would be considered undesirable.

The Oregon Center for Gerontology is also attempting to recruit disadvantaged trainees, but the organization reported limited funds available for special incentives. The Georgia Regents maintain that the recommendation's principle is already operative in their system, and the University of Nebraska intends to promote such hiring by employing a part-time minority recruiter.

More significant implementation was reported on the recommendation that funds for recruitment and training of personnel should be allotted without priority based on sex or age. Units from South Carolina, Oregon and Idaho replied that such non-discrimination was already a state policy. The Nevada Division for Aging Services also stated that the recommendation was an accepted state policy, but only on a very limited basis. The University of Nebraska Gerontology Center has adopted a new policy barring discrimination on the basis of age or sex, while such discrimination is now prohibited in certain types of aged programs in North Dakota, Tennessee and Illinois. A new Executive Order in Rhode Island is expected to result in each agency developing affirmative action plans calling for proper consideration in hiring of members of minority groups.

Institutional Training

Recommendations which call for expanded training in institutional settings such as multidisciplinary centers, professional schools, community colleges and elementary and secondary schools have been among the most actively implemented.

Multidisciplinary Centers--Although few gerontology centers have been actually established in multidisciplinary environments, widespread efforts are underway to promote the integration of aged-related materials into curricula at colleges and universities.

The New York State Office for the Aging is advocating the establishment of an institute within the State university system which would draw on all 62 schools of study. One gerontology Center has already been initiated at Syracuse University. Extensive programs in gerontology are also operating in multi-disciplinary environments at universities in Nebraska and Indiana, while plans for centers are being made in New Mexico and Hawaii. The Mississippi Council on Aging is supporting efforts to create regional research and training centers.

Professional Schools--Attention is also being given to the recommendation that subject matter on aging be interjected into related professional school curricula. The New Mexico Commission on Aging recently conducted workshops in gerontology for faculty members from various state colleges and universities. The University of South Florida is developing a core of gerontology courses for non-majors and particularly urges physical and vocational rehabilitation students to select such courses as electives. Conversely, those enrolled in the University's gerontology program are placed in rehabilitation facilities for internship programs.

The North Dakota Division of Aging Services has called together representatives from all State Institutions of higher learning to develop an inventory of training programs which will aid professionals in the state. Nursing schools in North Dakota and Delaware have introduced geriatric care courses into their programs. The inclusion of aged related materials into other professional courses is also being advanced in Hawaii and Nebraska.

Community colleges--Attempts to apply the resources of community colleges to the problems of the aged are underway in Oklahoma, North Dakota, Mississippi, Georgia and Maryland. In Hawaii, community colleges are now being surveyed to determine the extent of interest and activities in fields relating to aging. Consultants have been provided to assist planners in Florida's junior colleges so that appropriate geriatric programs can be developed. Aging offices in Indiana and New York are also cooperating with junior colleges to advance the interests of the elderly.

In Oregon, negotiations are underway to establish an Associate of Arts degree program in social gerontology which would be offered through two community colleges. Long range plans call for the eventual participation of 16 colleges.

Sub-college level-- The Georgia Department of Human Resources has called on all levels of the state educational system to develop courses which would begin in elementary schools and deal with the aging process. In Idaho, preliminary steps have been taken to implement a gerontology training program for elementary school health teachers and the New Mexico Commission on Aging is working with the Department of Education to introduce aging processes courses at the high school level.

Data Banks

Although directed to the Federal government, the proposal to establish a national gerontology data bank and retrieval system has been adapted at the local level by the Puerto Rico Gericulture Commission. Such a clearinghouse is now in preparation and will begin operation as soon as suitable facilities can be secured. In Oklahoma, an informal study of the feasibility of creating such a data bank is being conducted.

Conclusions

Training efforts both as a component for service delivery and in areas to increase awareness of the aging process, have been undertaken at an increased level since the Conference. Most significant has been the inspection of materials on aging in professional and para-professional training curricula, and the provision to train people who will deal with older persons to be more cognizant of the special problems and needs of the elderly. Greater efforts to involve and provide for minority group participation is warranted, and must be factored in future combined efforts of Federal, State and local training programs.

RESULTS OF SURVEY ON ACTION BY STATE UNITS OF GOVERNMENT

TRAINING

RECOMMENDATION NO.		ADVOCACY			FUNDING	TRAINING	SUPPORTED LEGISLATION			INITIATED NEW SERVICES	DISSEMINATED INFO TO:		RESEARCH
		TESTIMONY	MEDIA	LITIGATION			FED.	STATE	LOCAL		GOV'T.	MEDIA	
I.A.	Increase Present Levels of Funding in all Gov't. Agencies Concerned With Aging	1	1		7	8	2	4		4	2	5	
I.B.	Training Must be Conducted in Appropriate Settings in and Outside Educational Institutions	4	4		8	20	1	1	1	5	4	10	1
II.	Establish Federal Agency With Power to Coordinate all Federally Supported Training Programs	1							1				1
III.	Include Private Citizens as Representatives in all Planning Bodies			1									
IV.A.	Develop Research and Training Centers in Gerontology in a Wide Range of Institutions	5	1		5	7	3	2		3	4	3	
IV.B.	Develop Network of Relationships Between Educational and Service Agencies	1				2		1			2	2	
V.A.	Accelerate Support for Training in Aging	2	1	1	6	5	1	2			1	3	
V.B.	Earmark Funds for Training Personnel in Aging	1		1	5	8				1	2	3	
VI.A.	Allocate Funds for Personnel Trained in Aging Regardless of Sex or Age	1			1	3	1	1			5	5	
VI.B.	Offer Special Inducements to Recruit Personnel				1	1					1		
VII.	Earmark Funds at all Levels for Minority Groups	1			1								
VIII.A.	Insert Subject Matter on Aging into Curricula of Professional Schools	6		1	2	5				2	6	6	

VIII.B.	Develop Community College Certificate and Degree Programs for Personnel in Aging	5	1		4	1	1	2	1	2	2	2	1	
VIII.C.	Include Positive Concepts about Aging Process in Elementary and Secondary School Curricula	2	1	1	1	2		1		1	2		3	
IX.	Create National Institute of Gerontology and Earmark Funds for Training	1					7	1			4		3	
X.	Establish National Data Bank and Retrieval System	1						1			4		2	1
XI.	Provide Financial Support for New Service Positions in Balance With Support of Training Programs			1	1	2					2		1	
XII.	Divert Funds from the Military to Human Needs	1						2	1	1	1	1	1	

ACTION BY STATE UNITS OF GOVERNMENT

TRANSPORTATION

Information about action in the area of transportation was reported by 22 states. Of major interest is the fact that twelve of these responses were made by State Departments of Transportation, the State agency which is most able to initiate new action to solve the transportation problems of the elderly.

The other ten responses were filed by State units on Aging. All but one of these replies were from States lacking State Departments of Transportation. The actions which were taken by the State agencies on aging were considerably different and less direct in consequence than those initiated by State Departments of Transportation.

The number and type of responses to each of the recommendations made by the Delegates of the White House Conference on Aging is shown in the accompanying table. It shows those areas where State action was most responsive, primarily since the action was within the purview of the State to act.

In those areas in which little action has occurred, State actions would not be applicable as both of these recommendations would require Congressional legislation.

Introduction

The increasing awareness by government over the last decade about the transportation problems that all Americans face has led to considerable action at the State level designed to cope with these problems. Until only very recently though has widespread attention been given to the unique problems that older persons encounter when they attempt to travel. The White House Conference on Aging, however, dramatically portrayed the deep concern older persons feel about the difficulties they confront when traveling, and the recommendations for action made by the Conference Delegates to improve the situation underscored the serious nature of the problem.

Since the Conference there has been a dramatic increase in action at the State level in response to these recommendations. Illustrative of this responsiveness is the positive activity reported by twelve of the thirteen known State Departments of Transportation in the country to improve transportation services for older persons. These Departments, who are responsible for the actual development and implementation of all transportation services, have initiated a number of new projects, and their heightened awareness of the problems older persons face promises continuing action. That further action in this field is certain is indicated by the response of ten State units on aging who outlined vigorous policies of advocacy in order to improve transportation services for older persons.

While a wide range of actions have been initiated, the State responses to two Conference recommendations in particular, concerning (1) reduced fares on public transportation for older persons, and (2) increased attention to the basic transportation needs of the rural elderly, are especially impressive.

Reduced Fares

Numerous communities and some States already had experimented with reduced or no fare systems for older persons before the 1971 Conference convened. But the recommendations calling for reduced or no fare transit systems for the elderly have sparked new initiatives throughout the nation.

States and localities utilized a number of funding sources ranging from Title III of the Older Americans Act and UMTA demonstration grants to State lottery proceeds to finance new reduced fare programs. Several new reduced fare programs were initiated in Montana, some Illinois cities are experimenting with reduced fare systems, a transit service program for senior citizens is now provided in Delaware with a 15¢ fare, and a reduced fare system is now operating in four Connecticut towns under an UMTA demonstration program. In Colorado, both Denver and Pueblo are operating reduced fare systems, while Savannah and Columbus, Georgia have also instituted senior citizen reduced fare programs. A new reduced fare system has been implemented in Kansas City, Missouri as well. In Maryland, the Baltimore Metropolitan Transit Authority now provides half-fare service for older persons during non-peak hours. reduced fare systems are now operative in Minnesota, where Title III demonstration funds are utilized for financing the programs. Dubuque, Iowa also used Title III demonstration funds for a reduced fare mini-bus project that has been established there for older persons.

Florida and Wisconsin are both planning future programs. Florida is presently developing joint funding plans with other State agencies to finance a reduced fare program, while Wisconsin completed a financial analysis on the effect of half-fares for the elderly during non-peak hours. The Governor's Study Commission on Mass Transit is expected to make a decision soon on whether to institute the system state-wide.

Hawaii and Pennsylvania seem to be in the unique position of providing free-fare transit systems for all people over age 65. Pennsylvania now finances its no-fare transit program for older persons with proceeds from the Pennsylvania State Lottery.

One problem now is that the U.S. Department of Transportation is not authorized to provide operating subsidies. Therefore, once UMTA demonstration grants expire, which have been used to finance reduced fare systems, the need exists to secure non-Federal resources for the continued support of these programs.

Rural Transportation Programs

Transportation problems have generally been linked to large urban centers. But for older persons who live in the sparsely settled areas of rural America, isolation often results because of a lack of transportation services to transport them to the nearest community or from small communities to larger ones that have the services older persons require. Since the Conference though, a number of new programs have been started in response to the recommendation that greater attention be given to the transportation needs of the rural elderly. As recently as late October, 1972, the Governor of Illinois announced in a major policy statement that the transportation needs of rural older persons would receive greater emphasis in the future.

Some States have purchased vehicles, made Title III grants, planned, and provided information and technical assistance to localities in efforts to ease the transportation problems of older rural persons. One rural "mass" transit project is presently operating in Gwinnett County, Georgia, and another is in its initial phase in Griffin County. Meanwhile, in Hawaii, a rural fare-free bus service has been implemented with the utilization of local funds, and in Montana a rural transportation program has been initiated in the middle part of the State in the Rygate area. Delaware is proceeding to purchase vehicles for its rural transportation programs.

Minnesota, Maryland, Missouri and Connecticut have all made Title III grants to finance rural transportation systems. The program in Maryland provides half-fares and special runs in a rural bus service for the elderly. Connecticut augments its projects with funding from the Connecticut State Department of Transportation and the U.S. Department of Agriculture.

New York State encourages the initiation of rural transportation programs for the elderly by providing technical assistance to localities who develop them. Similarly, Wisconsin provides technical assistance to agencies that provide transit service to the rural elderly. Pennsylvania has a study underway within the State Department of Transportation, and Florida is now developing two demonstration projects to determine the effectiveness of potential transportation systems for older persons who live in rural areas.

Other Action

While no other single recommendation received as widespread State response as the previous ones, a number of other new programs have been initiated. For example, in an effort to develop new, innovative systems with special attention given to the needs of the elderly, a mini-bus service has been launched in several Illinois cities that transports older persons to and from community centers. Georgia is attempting to initiate new public transit services in the cities of Griffin, Gainesville, Athens, and Valdosta. Hawaii has implemented new services through the Honolulu Public Transit System, and new projects have been initiated and developed in Butte and Missoula, Montana, in addition to the aforementioned rural project in Rygate.

1. Coordination of Transportation Services with other Publicly Funded Programs for Older Persons

A number of States took new initiatives to insure that transportation programs would be coordinated with other programs for older persons, and thereby guarantee older persons access to those programs. For the most part, State activity involved advocacy in favor of such an approach coupled with support of Federal, State and local legislation aimed at requiring this coordination.

However, the Illinois State Department of Transportation now requires that transportation services be coordinated with other service programs for older persons as part of its Capital Grant Program. In California, such coordination is required by the State's Transportation Development Act. New York State, in its "Statewide Master Plan for Transportation" recognized the need for greater coordination of transportation services with other programs, and has suggested tentative means of achieving greater coordination.

2. Coordination of Vehicles

Several States have responded to the recommendation urging that existing Transportation resources, including government-owned vehicles, be better coordinated to achieve better transportation service for older persons. An effort has been initiated by the Savannah, Georgia Model Cities Program to pool the publicly and church-owned buses and vans in the city to transport senior citizens, the poor and the sick. Gainesville and Griffin, Georgia are investigating similar projects. Connecticut has moved to increase its use of school buses to transport older persons. School buses are also being utilized to transport older persons in Massachusetts, where local Councils on Aging have taken the initiative to arrange such services. Florida's State Department of Transportation now has the question of using government vehicles to transport the elderly under study, and the Iowa Commission on Aging has sent a resolution to the Iowa Department of Transportation urging it to undertake a similar study.

In Delaware, a statewide motor pool has been established for the use of individuals, and to take older persons to senior centers and return them to their homes.

Information and referral agents to assist the elderly are being appointed locally in Connecticut in accordance with Public Law 70 just passed in the 1972 regular Legislative Session. The State Department of Transportation believes these agents will be able to act as "local clearinghouses" on available transportation resources for older persons.

3. Improved Design Standards

A number of the Conference recommendations concerning transportation dealt with the need to establish better design standards to insure that facilities and services would be accessible and convenient for the elderly to use. While various States did not tend to focus on any one aspect of designing such standards, a great deal of action did take place in response to the delegates' concern.

New York, for instance, which utilizes a grant-in-aid program to localities for transportation services, had developed a set of design standards sensitive to the needs of older persons. As a pre-condition of State assistance under the grant-in-aid program, localities must meet these standards in their plans to provide transportation services. The Maryland Commission on Aging recently made a set of specific recommendations to the designers of the new subway system in Metropolitan Baltimore aimed at ensuring the comfort, convenience and safety of older persons who will use the system.

Both Connecticut and Wisconsin have acted to ensure that more ramps are available for older persons. The Connecticut State Department on Aging is supporting efforts to increase the use of ramps on railroad platforms. The 1972 Wisconsin legislature enacted legislation that requires ramps at specified maximum intervals and certain locations along street curbs in any new construction. Georgia has also moved to improve access for older persons who are traveling by planning rest areas that enable all older persons to fully utilize the facilities.

Hawaii has attempted to make traveling easier for the elderly by developing improved signs and by providing information dissemination at the local level.

Finally, Florida has launched a vigorous effort to improve its design standards to minimize the transportation problems faced by the elderly. The Florida State Department of Transportation designed a Safe-T-Push door for buses that provides a secure hand hold for the elderly, and a new low-floor bus, with attempts being made now to construct and test a prototype. Both Florida and Wisconsin have developed detailed vehicle design features that make vehicles more convenient for older persons.

4. Research in Transportation Problems of Older Persons

In addition to the action taken since the Conference, research efforts already initiated ensure that such action will continue in the years to come. The New York Department of Transportation is undertaking an economic analysis of all State programs that have transportation components, with an eye towards improving them for the elderly. Oklahoma is conducting a demographic study of the numbers and location of older persons who are in need of transportation. In Wisconsin, the State Department of Transportation has provided staff assistance to the Governor's Committee on Mass Transit, which is investigating the transportation needs of the elderly, both rural and urban. Florida's State Department has followed a similar path, and has contracted with Florida State University to identify the total transportation needs of older persons in the State. As these needs are identified, demonstration projects to meet them will be designed, and following an evaluation of these projects, a statewide transit improvement program will be implemented.

RESULTS OF SURVEY ON ACTION BY STATE UNITS OF GOVERNMENT

TRANSPORTATION

RECOMMENDATION NO.		ADVOCACY			FUNDING	TRAINING	SUPPORTED LEGISLATION			INITIATED NEW SERVICES	DISSEMINATED INFO TO:		RESEARCH
		TESTIMONY	MEDIA	LITIGATION			FED.	STATE	LOCAL		GOV'T.	MEDIA	
I.A.	Increase Transportation Services for the Rural and Urban Elderly	2	2		4		1	3	1		3	6	4
I.B.	Make Subsidies Available to Existing and New Systems	6	6		11		2	7	3	7	6	9	3
I.C.	Direct Programs Purposes Towards Reduced or No Fare Transit for Elderly	7	4		2		2	4	3	7	7	9	5
II.	Increase Support for Development of Transportation for all Users	5	2		4		1	4	3	1	6	7	1
III.A.	Require Transportation as Part of Publicly Funded Programs for Elderly	5	3		4		1	3	2	1	4	4	3
III.B.	Coordinate Existing and New Planned Transportation With Publicly Funded Programs for Elderly	4	2		2		1	1	1	2	4	3	1
IV.A.	Make Government Passenger Vehicles Available for Senior Citizens Programs	3	2		1		1	2	2	1	4	5	
IV.B.	Establish Area Clearinghouse to Insure that Local Transportation Resources are used Efficiently	1	1				1	1	1		1	1	
V.	Provide Support for Development of Individualized, Flexible Transportation for Elderly	3	3		3		2	2	2	1	5	5	
VI.A.	Set Minimum Standards for Design of Equipment and Facilities	5	4	1	4	1	2	2	2	3	2	2	3
VI.B.	Develop Programs to Assure Safety, Comfort, and Convenience of Elderly	2	2		1		1	1	1	1	2	1	1
VII.A.	Develop Transportation Systems that are Accessible to all People	3	2		2		1	1	1		1	2	1
VII.B.	Provide Guidelines to Assist in Development of Improved Ancillary Services	2	2				1	1	2		2	2	1
VIII.	Allow Elderly and Handicapped to Travel at Half Fares or Less on all Public Transportation	1	2		2		1	2	1		4	4	

IX.	Increase Funds and Forter Coordination in all Forms of Transportation	5	5	1	4	3	3		3	4
X.A.	Convert Highway Trust Fund into a General Transportation Fund	2	1		1	3	1			
X.S.	Make Part of Transportation Funds Available for Development and Improvement of Services for Elderly	1			1		1			
XI.	Establish Set of Driver's Licensing Standards that Don't Discriminate Against Elderly	3	2			1	2	1	3	3
XII.	Establish Policy for Guaranteed Liability Insurance	2	1		1	1	2	2	2	2
XIII.	Encourage and Compensate Volunteer Drivers for the Elderly	3	1		4	1	1	1	5	4
XIV.	Appoint Elderly Person to Represent Needs of the Elderly in Transportation									
XV.	Prohibit Insurance Companies from Increasing Premiums or Cancelling Policies on Age Alone	1				1	1		2	2
XVI.	Encourage No-Fault Insurance and Government-Operated Insurance Programs	2	2			1	6	1	2	2
XVII.A.	Correct Present Lack of Provisions for Transportation Needs of Elderly	1	2		4	1	2	2	3	6
XVII.B.	Amend Laws to Include Definitions of Responsibility for Rural Transportation	2	1			1	1	1	1	1
XVIII.	Empower Federal Gov't. to Act in the Absence of State or Local Response	1	1			1	1	1	1	1
XIX.	Incorporate Transportation in Planning of Privately Funded Senior Housing Projects	2	1			1	1	1	2	2
XX.	Apply all Policies Adopted to all the U.S. and all Territories Associated With It									
XXI.	Assure Equal Transportation Services for American Reservation Indians	1	1			1	1	1	1	1
XXII.	Include Free-Wheeling Workshop to Offer New Ideas Not Previously Explored	3	2			1	1	1	1	1

STRATEGIES FOR POSSIBLE
ACTION AT THE
STATE AND LOCAL LEVEL

TABLE OF CONTENTS

	<u>Page</u>
Aging and Rehabilitation.....	583
Education.....	584
Employment and Retirement.....	586
Facilities, Programs and Services	588
Government and Non-Government Organizations	590
Housing	591
Income	594
Nutrition	596
Physical and Mental Health	599
Planning and Organization	601
Research	602
Retirement Roles and Activities	604
Spiritual Well Being	606
Training	608
Transportation	609

AGING AND REHABILITATION

Many persons in growing old experience disabling conditions such as a substantial or complete hearing or seeing loss, crippling forms of accidents, and degenerative diseases. Too frequently, older people and their families assume that the disabilities are inevitable manifestations of old age and that nothing can be done to improve their functional capacities and therefore, no steps are taken to improve their circumstances.

Various national organizations in the field of vocational and physical rehabilitation provide leadership in the field of rehabilitation, develop and test new prosthetic devices, demonstrate effective teaching and job placement techniques, support and carry out research, and train both teachers and disabled persons. They also promote the formation of local chapters or groups to carry out or promote programs at the community level.

All these efforts are extraordinarily important as are the programs of the State vocational educational agencies. What has been neglected, however, is proper emphasis on the rehabilitation of older persons, in part because the success of programs is measured in terms of number of clients restored to employment status and partly because, as mentioned earlier, both the older persons and the professional worker hold negative attitudes toward aging and, therefore, feel rehabilitative efforts are useless or at most of little value in the long run. More emphasis should be given as a part of the rehabilitation process to personal adjustment services, which if adequately provided, will assist the aging person to function independently. For example, the visually handicapped persons should have available services in the areas of mobility, communications, personal management, and, if desired, recreation. These very same elements should be made available to other aging people who may have disabilities, and those without impairments could certainly take advantage of programs in skill areas which would assist them to function independently.

Community Councils on Aging and local chapters of national rehabilitation organizations are urged to make rehabilitation of the elderly a special program. Time, energy, and special allocation of funds are needed to demonstrate that rehabilitation of the elderly is indeed beneficial to society, the individual, and the economy.

EDUCATION

The Delegates to the White House Conference on Aging had as a principal aim, communicating to local, State, and Federal officials involved with public education, the need to make education accessible to older persons by providing adequate resources including funds, administrative support and leadership. The Delegates were particularly concerned that the resources of public education be brought to bear on the problem of functional illiteracy among older people and that special attention be paid to the non-English speaking elderly. In this regard it is suggested that State departments of education and local boards of education establish as a budgeted objective the elimination of illiteracy among the older people in their jurisdiction.

The Delegates to the Conference were likewise intent on pointing out that in order for older people to take advantage of existing educational and enrichment programs, some important changes on the part of educational institutions would be required -- changes away from (1) classroom techniques that measure quickness of reflexes or visual and auditory acuity; (2) class meetings scheduled late at night; (3) campuses that require private transportation to be reached; (4) the tendency to charge fees; and (5) the failure to conduct educational programs in congenial settings such as housing projects, labor unions, libraries.

It is urged that State departments of education, local boards of education, and governing bodies of institutions of higher education, take steps to eliminate those procedural and structural barriers that prevent older persons from functioning as students in educational institutions.

Similarly it is urged that State and local officials support special library programs for older people and encourage the use of mobile units to service those elderly persons who are isolated either because of illness or because they reside in a rural community. Similarly there is an urgent need to mobilize mass media, especially radio and TV, for purposes of reaching and educating the elderly.

Agencies and institutions, including State and local governments, which offer educational programs for older people should be encouraged to develop pre and post-retirement programs. In this regard there is an urgent need to train persons to work with older people.

Because the Delegates believed that the educational establishment has an important role to play in educating the entire population, other recommendations were concerned with the impact that educational agencies could have on the formation of a new national awareness of and attitude toward aging. This, State and local officials should be encouraged to make available to public radio and television systems financial and other resources to allow such systems to develop and air programs about and for the aged. In addition, State Education Departments should provide material on the aging process to elementary and secondary schools.

In the final analysis, however, the entire process of developing educational opportunities for older Americans will be at a standstill until such time as national, State and local leaders perceive educational opportunity for the elderly as a social imperative, and until such time as these and other decision-makers mandate the development of programs by providing fiscal support. It is a matter of some importance that as yet older people themselves have not seen fit to insist on educational opportunity, and that those who might be expected to be their advocates have not made themselves heard.

EMPLOYMENT AND RETIREMENT

H.R. 1, by liberalizing the retirement test under social security, makes possible increased income for older persons through employment. A task confronting State and local government and the private sector, then, is to expand the opportunities for employment of the elderly.

Green Thumb, Senior Aides, and other Operation Mainstream programs have clearly demonstrated that community service employment of the low income elderly has great value--both to the individual employed and the community served. Every effort should be made to establish such community service programs throughout the nation, using funds made available to the cities through general revenue sharing.

A specific area of expanded community service is in the field of child care. During the last decade a large increase has occurred in the number of child care centers. Even greater increases can be anticipated in the future.

The Delegates to the Section on Employment of the White House Conference on Aging recognized that the field of child care is an attractive possibility for providing substantial employment opportunities for the elderly. States and localities which finance the provision of child care services can help realize this possibility by reserving large numbers of jobs in publicly supported child care centers for older persons and by taking positive action to eliminate whatever barriers exist to older persons' availing themselves of those reserved positions.

Another major source of expanded job opportunities is part-time work in the private sector. Evidence suggests that there is a significant number of necessary tasks in private industry that go largely undone because younger workers, viewing the tasks as dead-end work, are unwilling to accept such employment. State and local manpower authorities are urged to undertake activities designed to assist the private sector in identifying possible part-time work for older workers, and to recruit and place candidates for these positions.

A third source of expanded employment opportunities could occur if retirement were made less abrupt and, instead, phased in over a period of years overlapping what is currently the age of mandatory retirement. Such restructuring of retirement is only a small part of the larger possibility of restructuring the relationship between leisure and work throughout the life of an individual.

For such massive social changes to take place, including more flexible retirement, combined with greater opportunities for part-time employment, employers must be educated as to their desirability

and feasibility. National organizations of employers such as the U. S. Chamber of Commerce, the National Association of Manufacturers, and the American Management Association, are urged to develop programs through which such education can be provided to employers.

FACILITIES, PROGRAMS AND SERVICES

The enactment of Revenue Sharing provides States and communities with billions of dollars. States and communities should utilize these funds to expand, improve or develop facilities, programs and services for older persons. It is urged that Revenue Sharing funds will be sent in such a manner to assure that an equitable share of these funds will be allocated for use by older persons.

At the same time Revenue Sharing was enacted, a \$2.5 billion ceiling was placed on Federal expenditures for services for the recipients of public assistance, including old age assistance. Many States are currently expecting to use less than their share of this \$2.5 billion. They are urged to consider matching their full share and using a portion of these additional resources to provide the complete range of services for older persons called for by the White House Conference.

Delegates were concerned about increasing the forms of protection society affords older persons. For a number of reasons, the elderly are particularly susceptible to consumer fraud. The White House Conference recommended the enactment by States and localities of such consumer protection measures as:

- health and no-fault automobile insurance legislation
- hearing aids, physical therapeutic devices and appliances legislation
- legislation requiring the conspicuous posting of the unit price of consumer commodities
- reform of regulations governing land sale transactions
- abolition of prohibition of advertising of prescription drug prices

The Council of State Governments, the State Attorneys General, the National Conference of Commissioners on Uniform State laws and the American Law Institute are urged to assume responsibility for facilitating and encouraging the enactment of such legislation.

Another form of protection involves physical protection. Older persons residing in declining urban neighborhoods are often victims of street crime. State and local agencies which obtained Federal law enforcement assistance grants are urged to use a portion of these funds to increase the physical security of older persons.

Yet, another form of protection involves protection of the civil liberties of older persons. The Handbook of Model State Statutes which was published by the National Council of Senior Citizens provides examples of statutes designed to deal with the

sensitive problem of balancing the rights of the older individual with the rights of his family. State legislatures are urged to consider comprehensive legislation in the form suggested by the Handbook.

GOVERNMENT AND NON-GOVERNMENT ORGANIZATION

A major recommendation of the delegates to the Section on Government and Non-Government organization was that advocacy with and on behalf of the elderly should be a vested responsibility of government. Perhaps the most successful model for the execution of such responsibility has been the functioning of the U.S. Senate Special Committee on Aging. While this Committee does not have authority to report legislation, its influence through calling attention to problem, gathering data concerning them, proposing solutions, serving as a focal point for concern, and functioning as a counterweight to Executive Branch organization devoted to older persons has been and continues to be enormous.

The New York Legislature has had a similar committee for many years. Recently, the California Legislature established one. The Oregon Legislature is experimenting along those lines. Other State and local legislative bodies are urged to study the model and adopt it in an appropriate form.

How state and local government organize their concern for the well-being of older persons varies throughout the nation. These variations reflect healthy differences in perception about the most appropriate relationships between programs for the aging and other public programs within the various States.

No matter how a unit of government organizes its programs for the elderly, a useful mechanism for bringing about greater coordination of such programs, for representing the interests of the elderly, and for interpreting the efforts of government to them is the designation of an official charged with these responsibilities within an appropriately influential office in State or local government. All units of government are urged to consider the possibility of such a designation.

A major concern of the Delegates to the Section on Government and Non-Government Organization of the White House Conference on Aging was greater use by the public sector of the strengths of the private sector. One barrier to greater use of the private sector is the lack of funds within the private sector for development of programs, including planning and capacity building. State and local agencies on aging therefore, are urged to devote immediate attention to working with organizations within the private sector on proposals for the use of revenue sharing funds, adult services funds, and Older Americans Act funds to support the development of innovative service programs which after development will be delivered in the private sector.

HOUSING

Delegates to the Housing Section of the White House Conference on Aging assumed the continuation of the Federal housing subsidy programs. They addressed most of their recommendations to proposing changes in the national policies governing these Federal programs. But they also called repeatedly for similar action to be taken at the State and local levels by both public and private sectors. Regardless of how seriously the Federal housing subsidy programs are curtailed, vigorous efforts must be made to encourage State and local governments to develop programs patterned after the successful experience of a number of States that have established programs for housing the elderly. These can provide guidance for the development of additional State and local programs throughout the nation.

Already at least 25 States have housing assistance agencies (HAA's). Although most are not addressed specifically to elderly housing, they are equipped to plan and administer such programs. Three sources of specific suggestions for state action and related local community actions are:

- A "Handbook of Model State Statutes" which was published by the National Council of Senior Citizens, Inc., provides examples of statutes on such topics as standards, rent control, state public housing authorities, non-profit rental housing, tax relief through income tax credit for property taxes paid and homestead tax exemptions for owners and refunds for renters.
- "Alternatives for Action: Housing" published by the National Association of Retired Persons - National Retired Teachers Association, lists 21 legislative actions which States, and local groups can take to implement the principal objectives of the White House Conference recommendations on housing.
- "Not Beyond Reach" is the story of how a local community (Rochester, New York) helped solve the problem of housing for the elderly through the use of the Mitchell-Lama Limited Profit Housing Company Law of New York State, the local government and a private non-profit development and management corporation.

On the basis of these three documents and the intent of the Conference delegates, it is recommended that all States establish a central housing agency to perform the functions at the State and local level which would assure, among other things, that there will be:

- an increasing supply of housing for the elderly of the types they need and at costs they can pay.

- a state elderly housing subsidy program which would provide for the public housing of the low-income elderly and would assist local community non-profit groups (A state direct loan program administered along the lines of the Federal Section 202 program is an example.).
- technical assistance to local non-profit groups and professionals and business organizations in assessing housing needs; potential markets; design, siting, and management of projects liberalization of zoning and building codes to permit siting.
- coordination of all State and local planning, programs, and services for the elderly as related to housing.
- an inventory of the type and adequacy of existing housing for the elderly on a community basis so that planning and advocacy can be directed toward the areas of greatest needs.
- a means of keeping rents low by local tax abatement and a system of land leasing by the city at a nominal yearly cost.

State and local governments will also wish to recognize the fact that the several Federal Housing programs designed particularly for the elderly are being reduced or completely phased out does not lessen the need for suitable living arrangements for the elderly at rentals that they can afford.

Preliminary figures show that from January 1963 to December 1972 222,866 low rent housing units have been built for the elderly. Under the HUD 202 program 43,938 housing units have been successfully completed in the last ten fiscal years, yet these represent only a small percentage of the total need as indicated by recent studies. We must make every effort to persuade the Federal Government that the Housing programs for the elderly have been successful and therefore should be judged separately from other housing programs.

Nonetheless, to meet the great need for housing for the elderly, State and local governments should enter into the development of such housing instead of relying completely on the Federal Government for all the housing needs of the elderly.

One successful technique that has been used is the development of a three way partnership between the state government, the local government and a local private non-profit group. The State finances a long term mortgage through a bond issue, the local government supplies city-owned land and some tax abatement and the private non-profit corporation assumes full responsibility for the development and management of the project. The justification for the tax abatement is based on the agreement that at the end of the mortgage period, the title of the housing project reverts to the city.

In developing State and local programs, consideration should be given to the 25 housing recommendations adopted by the White House Conference. These recommendations include such programs as supportive, social and outreach services.

Another initiative that should be taken by communities is to assist the elderly in retaining home ownership by some tax relief and by some grants or loans to rehabilitate their homes. This is now being done in many communities. In some cases, it is becoming too difficult for the elderly to physically maintain their homes, even though they may receive some financial help, through tax abatement. For these cases, a program should be developed by which the elderly owner can be helped financially to rehabilitate his home and then to rent it - using the rent to pay for low rental apartment built specifically for the elderly.

It is further recommended that each State hold, within the next few months, a state forum addressed to housing the elderly. Participants in this forum should represent legislators, State and local planning agencies, professional, business and industrial groups concerned with housing, and representatives of the older consumer group. The AARP-NTRA National Forum for State Legislators provides a pattern for such a conference.

INCOME

When the Delegates to the 1971 Conference on Aging met, the final form of H.R. 1 was more than 10 months away. At that time, the Conference Delegates recommended that older persons be provided with a guaranteed minimum income and that the income be adequate to meet requirements of an intermediate standard of living. H.R. 1 responded to this request by providing for the Supplemental Security Income Program, Title XVI of the Social Security Act as amended in 1972. This title provides for a federally supported income floor for all aged, blind and disabled persons at a much lower level than the recommended minimum. This law stipulates that States may supplement the minimum federal payments, and that the Federal Government may administer both the Federal and the State payments. The law further provides that the Federal Government will be responsible for all costs incurred by States that supplement the Federal payments at a level equal to a State's January 1972 payment schedule, if such costs exceed State expenditures for adult assistance in calendar 1972. The Supplemental Security Income Program thus affords States the opportunity to increase substantially the income of the older people in greatest need within their jurisdictions.

It is recommended that State legislatures take prompt and firm actions to maintain their 1972 level of spending to support the incomes of the aged, blind, and disabled when the Supplemental Security Income Program goes into effect. State legislatures should assure that, in future budgets, no less than their 1972 expenditures will be allocated for assistance to the aged, blind, and disabled. This issue is of paramount importance, and should be a top priority item for every State Legislation.

Many of the recommendations of the Conference were addressed to augmenting the incomes of the elderly and to suggesting means of alleviating some of the regressive financial drains on older people. It should be re-emphasized that improvements in tax programs are not an acceptable substitute for an adequate income floor for the elderly. However, until an adequate income floor is established by the Federal Government, State and local governing bodies are encouraged to undertake to increase the usable income of elderly persons by developing programs of tax relief for older people through reduction of, or exemption from, real property tax, personal property tax, sales tax, state and local income tax. In the absence of an adequate income floor they should also move to investigate the possibility of reducing the cost to the elderly poor of such necessities as electricity, gas, water, telephone service, and public transportation.

An important source of income for older and retired persons is private pensions and pensions of State and local governments. Conference recommendations called for governmental control and supervision of pension programs to assure that older workers receive their pension rights. Pending such public regulation,

it is suggested that leaders in the private pension industry cooperatively take steps to bring about voluntary solutions to problems such as the need for early vesting, portability, survivors benefits, complete disclosure to participants, and fiduciary responsibility. It is suggested likewise that State and local governments take steps to strengthen their pension programs in the same manner.

With the modifications in Federal programs and the termination of the support of many Federal-State welfare programs, State and local governments are urged to commit monies from federal revenue sharing to assure that there is no curtailment in service programs that are basic to the income maintenance of older persons. Finally States should enact pass-along legislation to allow Social Security beneficiaries to retain more than the minimum \$4 a month of the recent 20% increase in benefits when applying for welfare aid.

NUTRITION

The concept that proper nutrition is essential to good health is widely accepted but not commonly put into practice. Proper nutrition is far more unlikely among those elderly living on small incomes, alone or with only their spouses, in small quarters with limited space for food storage and poor food preparation facilities.

When shopping for food the elderly find that the foods, especially prepared foods, packaged in the small quantities suitable for their needs have the highest unit prices. Processors and retailers should be encouraged to develop packaging techniques and to take other measures so that "single servings" of foods may be sold at lower unit prices within reach of the elderly on low incomes.

State and local restaurant associations should encourage members to provide low-cost meals to the elderly at off-peak hours, a practice which would result in more efficient use of facilities and personnel and might even reduce food wastage.

The Nutrition Program established under Title VII of the Older Americans Act promises to provide meals fulfilling 1/3 or more of the Recommended Daily allowance (RDA) served in group settings through consumer contribution. The \$100 million of Federal funding originally authorized for the first year, however, will provide only 250,000 meals daily for potential beneficiaries. States, through Revenue Sharing or other resources, must supplement the Federal funds so that the Titled VII Nutrition Program can benefit a much larger percentage of the elderly than can be assisted by Federal funding alone.

People receiving benefits under the Supplemental Security Income stand to lose substantial purchasing power when they will no longer be able to participate in food stamp and commodity distribution programs when H.R. 1 is implemented on January 1, 1974. In anticipation of this, States should enact legislation to set an adult assistance level such that recipients will receive additional purchasing power to offset the loss of food stamp and commodity assistance plus inflation.

Encouraged through leadership by State officials and agencies, local communities must increase the effectiveness of current programs without increasing their costs. They must also expand existing programs and initiate new programs which will serve the large number of elderly (more than 8,000,000) who can not be reached by currently proposed Federal funding for Title VII. The expansion of current and the initiation of new programs presumes the expansion of outreach

programs begun in August 1972 with the Federally-sponsored Project FIND. These developments must be based on a well organized, dedicated volunteer effort comparable to that which arose in this country under the stresses of World War II.

Volunteer efforts must be coordinated to prevent duplication of effort. They must be complemented by an efficient, dedicated, cost-conscious, well-paid group of state employees who will coordinate Federal, regional and state-wide projects with those projects developed at the local level and supported by volunteers.

The state agency employees and the leadership of the volunteer groups must monitor legislative action within states to make certain that Federal matching funds are not lost through oversight or failure to meet certain deadlines. Political lobbying is an important function of volunteers. Monitoring the manner in which Federal revenue sharing is disbursed within states and constant pressure on state political leaders to obtain a large portion of shared revenue for nutrition and allied programs for the elderly are essential.

Spelling out details for each state or jurisdiction is impossible. However, spotlighting a common denominator for all political subdivisions is certainly possible. This common denominator can best be described as attitude. An attitude which demands an end to malnutrition among the elderly, an attitude which insists on making good nutrition a key to eliminating the boredom, ennui and sense of living death experienced by millions of our aged is essential.

Attitude is not created merely by need of the consumers or by demand from their more knowledgeable advocates. It must be developed by an educational process among all age groups. Certainly, the well-nourished two-thirds of the nation's elderly need to be educated about their less fortunate fellows in the same age cohorts. They must learn rational methods of resolving nutritional problems and must be trained to reject appeals by food-faddists and quacks who victimize not only the well-to-do elderly but the poor as well. Education about aging as a biologic, sociologic and economic phenomenon should accompany education in nutrition and health for all persons regardless of age. Changing attitudes toward the elderly is possible; state and local efforts toward inducing this change through education are the keystones of resolving the nutritional and related problems among the aged today.

While some jurisdictions have taken deliberate steps to resolve existing problems on their own, many have postponed truly forceful action because of the long delay in Title VII appropriations by the Federal government. Such procrastination is most unfortunate.

Even with full Federal funding, Title VII will help resolve the nutrition problems of a small percentage of those in need. The remainder must be assisted by state and local action. Title VII should be regarded as an incentive to states and local communities to develop the attitudes and the programs run by volunteers which will, hopefully, in a few years care for the remaining of the elderly in need.

PHYSICAL AND MENTAL HEALTH

The delegates to the WHCoA strongly recommended that all elderly have access to basic preventive and restorative health services provided as a part of an overall community health care system. In addition they called for adequate preparation of professional personnel and also for techniques to finance facilities and programs needed for comprehensive programs.

Implicit in these recommendations was the recognition that many elderly have limited resources to meet their health needs, local systems of health care are non-existent or inadequately geared to meet the needs of the elderly, that there is an inadequate investment from any source in quality programs for the elderly, and that there is inadequate supply of interested, committed and competent health professionals in this field.

Calls for ombudsmen and concern about the quality of service further indicated a lack of confidence in the system and the ability of the elderly to negotiate it.

The Federal response to these recommendations is uneven. In some areas steps have been taken to meet some of these and in others there has been some retrenchment.

Local and State governments should examine the opportunities available to them to fill in lacunae in all these recommendations. Illustrative of areas of concern are:

1. The maintenance of effort and supplementation of medicaid, eligibility levels, the degree of cost sharing and the scope of services all lie within the competency of the state government to a large degree. There is a clear mandate from the Conference delegates that Medicaid payments and services, in particular, not be cut back.

2. It is estimated that up to 50% of those facilities which heretofore have given what might be called intermediate care will significantly fall below the standards of the Life Safety Code, modeled by ICF regulations. This along with the number of non-conforming skilled nursing facilities would seem to occasion the need for significant outlays of capital for the replacement of facilities. States might well take initiatives to create funding opportunities for approved sponsors to upgrade, replace beds or develop new facilities.

3. Various state licensures inhibit the maximum use of facilities and programs to serve the elderly and should be examined.

4. It has been proposed that Revenue Sharing Funds be spent in health and in training according to State and local priorities. The elderly and programs for the elderly should participate in the decision making involved in the use of the funds themselves.

5. Public Law 92-603 strengthens planning policies on the State and local level by requiring programs and facilities be developed within the context of local health plans. State and local governments must take measures to assure that health plans reflect the needs of the elderly and include elderly and the providers of the elderly services in the planning process.

6. Many creative programs have come into being on the local scene assisting elderly to maintain health and self direction. Local communities should stimulate such initiative and utilize more from the communities where appropriate.

PLANNING AND ORGANIZATION

In recent years, usually in conjunction with Federal grants-in-aid, States have undertaken comprehensive planning in a wide number of areas including health, manpower, and law enforcement. The Delegates to the Section on Planning of the White House Conference on Aging were concerned lest such planning neglect the needs of older persons. States, are, therefore, urged to formally involve their State agencies on aging in the comprehensive planning process for all areas which affect the lives of older persons.

Another concern of the delegates was that older persons who are actual or potential beneficiaries of public programs should participate in the planning for these programs. Too often, older persons find themselves ill-equipped for such participation in the sense that they are unfamiliar with the context in which planning issues are resolved. States and communities are, therefore, urged to undertake appropriate education of older persons in leadership development so that their sense of autonomy with regard to public programs intended to meet their needs is maximized.

RESEARCH

Most of the recommendations of the delegates to the Section on Research of the White House Conference on Aging assumed that research on aging is totally dependent on federal support. This situation has, in fact, existed so long that not only scientists but also representatives of State and local groups recognize this dependence and apparently expect it to continue. Only a few States and local groups have reported to the Post-Conference Board any initiatives to modify the observed situation.

Dependence on a single source of funding creates special problems for scientists when the policies of the primary funding agency change rapidly. Stability of funding is especially important in the systematic development of scientific activity; this is so because the pursuit of long-range scientific goals and the development and retention of competent research investigators require long-range planning.

Over a number of years, increasing responsibility for support of research on aging may be successfully transferred to States and private foundations. However, the success of this eventual transfer will involve the development of values, attitudes, and organizations which either do not now exist or are only tenuously established at present. There is little reason to believe scientific research is so widely understood and valued, for example, that State legislatures will give such activity high priority, say, when they consider alternative allocations of revenues returned to the States by the Federal government. And, even in the unlikely event that research on aging were to receive high priority at the State level, most States do not currently have cadres of competent scientists who have interest or experience in aging. Most States have not established procedures for evaluating the merits of research proposals in aging they might receive.

Consequently, in the short run at least, the Federal government must take responsibility for outlining and implementing in an orderly fashion any intended shift in the source of funding research on aging. Among the Federal and States initiatives which might be considered are the following:

1. A systematic review of Federal, State, and private foundation policy regarding research on aging and the initiation of continuing conversations among appropriate agencies. These conversations would increase the probability of investment in diverse but complementary programs of research on aging by Federal, State and private sources of funding.

2. Private foundations and business firms should be encouraged to coordinate their investments in research on aging and to explore the possibility of pooling resources in some instances.

3. An experimental approach to the organization of research on aging should be encouraged. Specifically, a variety of organizational models should be evaluated; for example, i) comprehensive multidisciplinary university centers for research, training, and experimental application of services; ii) specialized university research and training in particular disciplines and in limited combinations of disciplines (biomedical or behavioral/social sciences; iii) consortia of universities or university centers on aging; iv) problem-focused institutes on aging, with and without an association with particular universities; or v) regional or national training laboratories.

Although careful evaluation of the merits of these alternative organizational forms might suggest that some are more effective and efficient than others, it is probable that more than one type would be found to be useful enough to warrant continued support. The required experimentation would necessarily involve the collaboration and active support of Federal, State, and private agencies.

4. Particular attention should be given to the translation of research information into effective action. Research and training in aging must eventually result in effective and efficient service for the aging if adequate public support is to be achieved and sustained. Effective translation of knowledge into service will require i) the application of advanced techniques of information storage, retrieval, and evaluation to the field of aging; and ii) increased interchange of those who produce knowledge and those who apply it. Teaching-learning situations should be designed to increase experience with and improve the understanding of the conditions under which both the producers and consumers of knowledge about aging work.

In sum, in the long run, the changing patterns of support for research in aging provide an opportunity to improve the effectiveness of current research efforts in aging. In this period of transition, however, the interest, cooperation and active support of Federal, State, and private agencies is vital.

RETIREMENT ROLES AND ACTIVITIES

The Delegates to the Conference echoed the thought that much too little had been done to make available to older people sufficient opportunities to continue a meaningful contribution to society. The Delegates noted that emotional isolation and despondency may result from a lack of specific roles due to loss of roles developed in earlier life such as husband, employee or employer, citizen, etc., and the lack of opportunity to develop new roles relevant to the retirement status. The obstacles to attaining a measure of success in both these areas are imbedded in the nature of our society and its values. The Delegates have identified some of these that can be corrected and they have further stipulated that the whole question of role development is based on the individual's having adequate resources of income, housing, health and mental and spiritual well being.

As a starting point in developing opportunities for new roles, it seems logical to emphasize the appropriateness of volunteer roles in community service activities. Moreover, older volunteers have demonstrated that they can provide valuable services for local communities. Therefore, it is recommended that for each State and within each municipality elected officials affix the responsibility within some public agencies in stimulating volunteer and community service opportunity for older persons within the public sector. Likewise community leaders responsible for agencies and services under private sponsorship and support should be encouraged to work cooperatively with public agencies to initiate opportunities for older persons within their programs. Both kinds of agencies, public and private, should call upon the experience and resources of the Retired Senior Volunteer Program and the National Centers for Voluntary Action. There are many community services and institutions such as hospitals, libraries and schools, both public and private, that could be beneficiaries of volunteer services.

Although recreational and social programs are usually a normal aspect of community services, in most cases these programs have been developed for younger age groups and may be inappropriate, or for a variety of other reasons, inaccessible to older persons. We, therefore, would call on State and local lawmakers and leaders to legislatively mandate the appropriate portions of their jurisdiction's recreation budget be devoted to programs for older persons. Moreover all State and local officials in charge of recreational programs and facilities should, within their jurisdictions, develop a full range of physical and social activities for older people and immediately begin a program to make all recreational facilities structurally barrier free to aged or disabled persons.

It is becoming increasingly evident that older people are beginning to turn to education and training in order to widen their search for meaningful roles. This means usually a return to the role of learner. We would urge that public school officials and the heads of private educational institutions give serious thought to opening the doors of their institutions to the older person and thereby assist both the individual and the community.

SPIRITUAL WELL-BEING

Religious bodies are uniquely positioned to help older people by their historical mission of concern and emotional support and by their resources for leadership. An initiative which the religious organizations could take would be to have each church or synagogue sponsor at least one program serving the elderly. Programs sponsored by religious organizations have two advantages: 1) the availability of facilities which may not be used every day; and 2) participants from the membership who are anxious for opportunities for service which are truly useful and purposeful. Programs could be:

- running a nutrition project or meals-on-wheels from kitchen facilities
- involving parishioners in friendly visiting and telephone reassurance
- sponsoring visits to nursing homes, old age homes by retired clergy, social workers and men and women with special training and talent to give spiritual consolation
- arranging for families to "adopt a grandparent"
- running a day care center for the aged
- purchasing and maintaining a home for older persons

Each of these suggestions would seem to be particularly apt opportunities for projects which would involve the skills of whole congregations.

One of the stated purposes of the National Inter-faith Coalition On Aging is "to stimulate cooperative and coordinated action between the nation's religious sector and national secular private and public organizations and agencies whose programs and services relate to the welfare and dignity of aging people." Religious organizations should work to foster this kind of action at the local level. By pooling their resources religious organizations can be more effective:

- in pressing for programs and services to help the elderly
- in compiling surveys of facilities and programs available
- in avoiding duplication of programs within a community
- in speaking for the elderly so they are treated with fairness and dignity

Through the pulpit, publications, religious education programs and training of their clergy, religious organizations are an important channel for fostering new attitudes. Through their educational channels religious organizations could work towards:

- engendering more understanding and compassionate attitudes toward aging and the aged
- resolving the dilemma of reverence for life and the painful delay of death through advanced medical techniques.

TRAINING

In the face of what appear to be forthcoming changes in the Federal pattern of spending for the development of manpower and related needs in the field of aging, it seems important to consider what actions can be taken to maximize the training potential of the limited available resources. In an effort to define and meet the need efficiently, State higher education officials are asked to launch programs designed to ascertain the need for training in aging within their States and develop, through the public higher education agencies, interdisciplinary, interinstitutional State centers for studies in aging. Such centers could 1) develop models for State programs as needed, 2) be available to provide short term in-service training and consulting services; 3) maintain a data bank to make available to students and practitioners available knowledge and research in the field of aging; 4) provide content in aging to related degree programs at undergraduate and graduate levels; 5) in other ways service and support students and instructors from community colleges, colleges, and universities as well as the professional and para-professional practitioner in the field.

In addition to upgrading and supporting existing training programs, many Delegates were concerned that there be efforts to attract enough able people to the field of aging to meet both the current and the future demands for trained personnel. It is recommended that the National organizations of vocational and guidance counsellors develop in-service programs for their members to acquaint them with the employment and professional opportunities in the field of aging. Many professional organizations have the capacity to assist in this effort and to engage in recruitment of personnel into the field of aging on their own.

In recognition of the fact that proper training significantly affects the ability of the individual to deliver service adequately, State and local officials responsible for licensing and certifying the deliverers of service are urged to move toward improving the quality of care given to older people by establishing as a requirement before employment or licensing, specific study in the field of aging and demonstrated competence to work with the elderly. To institute such qualifications without development of appropriate educational resources and incentive for education, however, would only compound the current shortage of trained personnel in gerontology. Development of educational resources and incentive for education are therefore imperative if the quality of care for the elderly is to be assured.

TRANSPORTATION

The 1971 White House Conference on Aging found that the lack of transportation was a pervasive problem for older people. Without means of transportation older persons find themselves increasingly isolated or dependent. The success of many activities and programs is curtailed because of the inability of older persons to travel easily.

Sixteen States have established State Departments of Transportation. Although the State DOT's are not specifically charged with solving the problem of transportation for the elderly, it was found that they were able to take action to benefit the elderly in the realm of public transportation. Therefore it is recommended that all States establish Departments of Transportation to:

- develop a coordinated, comprehensive transportation system;
- establish and enforce standards for vehicles and related transportation facilities for the ease, accessibility and safety of older riders;
- subsidize local transportation companies so the elderly can ride at reduced or no fares;
- encourage local transportation companies to review their practices, routing, information services with the purpose of making their services more available and more comfortable to the elderly during non-commuter hours.

It should be noted that to establish a State Department of Transportation encompassing the objectives contained herein would require transcending many deeply ingrained institutional interests, practices and attitudes. Not a small part of this latter consideration is the interests of workers affected by such a change. Care should be taken not to alienate this solid spectrum of support needed to reach the objectives.

Many older people could solve their transportation problems if they were not prohibited from driving automobiles. State laws should insure that drivers licenses are issued on the basis of competence to drive rather than on age. Similarly, companies selling automobile insurance should be prohibited by law from discriminating against older drivers in the refusal to sell them policies or in setting higher premium rates. Older persons with good driving records should be allowed premium discounts, just as younger drivers are. Legislation establishing no fault insurance would also help older drivers to continue driving.

REPORT OF ACTIVITIES BY
NATIONAL ORGANIZATIONS AND
OTHER PRIVATE SECTOR GROUPS

-611-

INTRODUCTION

The White House Conference on Aging generated a great deal of activity among National voluntary organizations and local private groups. This activity was so extensive that nothing less than a carefully planned field study could accurately measure the magnitude of action that has occurred. Such a field study has not been possible to date.

It has been possible, however, through an analysis of questionnaires which were distributed to national organizations and a report prepared by the National Center for Voluntary Action, to bring together illustrative material of action taken.

The first document of the appendix was developed from questionnaires sent to national organizations in early fall 1972. These questionnaires which were similar to those distributed to State governments, attempted to gauge the level of activity undertaken by these groups since the Conference.

The second document was prepared by the National Center for Voluntary Action. It represents activity in the private sector begun since the Conference that has come to the attention of the Center.

1. REPORT ON NATIONAL ORGANIZATION ACTION
RESPONSIVE TO THE CONFERENCE RECOMMENDATIONS

Introduction

Nearly 400 national organizations participated in the White House Conference on Aging. They played an important role in the formulation of the major issues to be discussed at the Conference, and each sent one or two representatives as delegates to the Conference. Reflecting the wide variety of the missions of their organizations, the representatives were distributed among all subject areas of the Conference. Recognizing the positive contributions national organizations are capable of making, the delegates looked to these organizations and their local affiliates to provide leadership and initiative in the field of aging after the Conference concluded. Activity by the voluntary sector during the past year would suggest that this confidence on the part of the delegates was justified.

No comprehensive report of specific activity in the private sector is possible at this time. A questionnaire sent to the national organizations which participated in the Conference was intended to provide such information. Too few organizations responded, however, to make possible any reliable qualitative or quantitative statements. But those organizations which did respond indicated that their activities were confined largely to advocacy and information dissemination to their members and affiliates in local communities.

The impression left by their responses to the recommendations to the White House Conference on Aging is one of widespread and increased support for programs for older persons. Especially noteworthy is their action in the fields of (1) health care, (2) housing, and (3) services to older persons in their places of residence.

Health Care

Health care is a major concern of all persons, and the delegates to the White House Conference on Aging, though primarily interested in improving health care for older persons, recognized this universal need in their recommendations calling for coordinated, comprehensive health services systems and a national health plan for all persons. As a consequence, a number of national organizations have undertaken increased activity in the last year to ensure that these recommendations are achieved and implemented.

The primary focus of this new action has been the federal sector. National organizations have launched vigorous drives in support of federal legislation to develop coordinated, comprehensive services and to establish a national health care plan. Organizations have also advocated these positions in testimony before Congressional Committees, and many of them have disseminated information concerning these recommendations to their memberships, the Federal government, and the public at large.

In the meantime, a number of national organizations have supported, chiefly through advocacy efforts, the Conference recommendation to increase Medicare benefits and coverage.

Several organizations have also moved to implement the Conference Recommendation calling for the inclusion of information regarding aging in school curricula at all levels of education. Most of this action has been limited to the dissemination of information about available curricula to both the general public and the government. The Council on Family Health is planning to incorporate aspects of aging in a junior high school level curriculum it is presently developing; the American Optometric Association is studying the possibility of including such course content in undergraduate professional education programs with which it is associated.

A number of other activities have been initiated by national organizations in the area of health care. The National League of Nursing has launched several new efforts. It is now working on a 1973 New England Conference on Continuity of Patient Care, and its Council of Home Health Agencies and Community Health Services is drafting guidelines and models for all types and sizes of home and community health services. These guidelines will provide agency staff and boards with helpful measurement tools to give assurance that appropriate staffing, including homemaker-health aides, is being provided.

The American Medical Women's Association, in cooperation with the American Medical Association, is preparing a pamphlet for older persons on the possible signs and symptoms of disease that may affect them. The National Easter Seal Society for Crippled Children and Adults is promoting expanded service and education programs for stroke patients among its affiliated societies. In another attempt to improve services, the American Optometric Association initiated a study on vision care and vision care costs.

To highlight the needs of older persons, the Hearing and Speech News, published by the National Association of Hearing and Speech Agencies, published a special issue on the needs of the elderly.

The American Association of Retired Persons (AARP) has initiated a new program, VIM (Vigor in Maturity) to provide health education to older persons. Designed to make older persons aware of their health and well-being, and to help them stay healthy, the program offers an overview of basic information concerning the physical and mental health of persons age 60 and older.

Finally, several organizations have formed new committees to ensure increased attention to the health needs of older persons. For example, the American Geriatrics Society established a Multi-disciplinary Council for Long-Term Care of the Geriatric Patients and the American Osteopathic Association established a committee on Allied Health Education.

Housing

The delegates to the Conference did not view the need for increased housing simply as a matter of building more roofs over people's heads. Instead, they urged that a variety of housing consistent with older person's needs must be provided. Moreover, the delegates emphasized that housing and services must not be separated, but rather should be thought of as an integrated whole.

Significantly, several national organizations agreed with the recommendation calling for linking services and housing, especially through the use of congregate housing. Organizations became primarily involved by disseminating information about the recommendation and congregate housing programs to the public and governmental agencies.

Several national organizations have vigorously advocated the continued implementation of Section 202 of the National Housing Act in accordance with the desire expressed by the Conference delegates. Organizations have disseminated information about the program to their members and the public. Moreover, they have actively supported Federal legislation designed to retain the program.

National organizations have also shown interest in distributing information about two other Conference recommendations. They have strongly supported, through their information-distribution activities, the effort to encourage and assist minority nonprofit groups to develop housing for the elderly. Similarly, they have given support to the recommendation that adequate replacement units and relocation programs be provided and available before older persons are displaced from their housing units.

The Little Sisters of the Poor, who have provided homes for older persons for nearly one hundred years, are now rebuilding and replacing their 45 homes for older persons that are located throughout the country. The National Association of Senior Citizens is supporting the Cabin John Project in Montgomery County, Maryland, a residentially-oriented congregate housing development for older persons.

Services to Older Persons

Shortly before the White House Conference on Aging, an ad hoc Steering Committee of National Volunteer Organizations was organized to coordinate the efforts of national organizations in selected communities throughout the nation. The aim of the Committee was to help older persons remain in or return to their own homes or other places of residence. 137 national voluntary organizations committed themselves to this project, and as a consequence, many have subsequently decided to maximize their effectiveness by concentrating their efforts in this one area.

Originally 221 communities agreed to participate in the project. In each of these communities, affiliates of national organizations work with one another and public agencies to provide services to older persons. These services are extremely wide-ranging and include counseling services, cooperative buying projects, meals programs, homemakers services, transportation programs, outreach services, driver refresher courses, home renovation and repair programs, telephone reassurance projects, legal services, and retirement planning, to not only some.

Illustrative of specific new service programs that have developed as a result of efforts by national voluntary organizations in local communities throughout the country is a meals-on-wheels program begun in the fall of 1972 in Morgan County, Indiana. Other examples are an emergency nutrition program in Kauai County, Hawaii, a home nursing program in Grant County, Washington, a reduced cab fare program in Arlington County, Virginia that now enables older persons to travel to and from county offices for only 20¢ and a comprehensive service delivery system in Portland, Maine.

The National Steering Committee has provided strong leadership in assisting and encouraging local communities to establish local steering committees. The establishment of these local committees, composed of local volunteer groups and other interested parties, will provide a base in communities across the country from which to operate on-going programs and to initiate new ones.

As an indication of the growing vitality of this effort, 53 new communities have agreed to participate in the program since December 1972. The National Steering Committee observed in its six-month Interim Report issued in October 1972, "Many communities have extensive on-going programs; others are drawing on the newly-discovered strengths of the local affiliates of national voluntary organizations, still others have a renewed awareness of older persons' needs and how they may be met."

Other

Numerous other programs have been initiated by national organizations throughout the nation. One of the most dramatic examples of national organization action in assisting older persons is the Red Cross involvement in Project FIND. This program, designed to literally "find" older persons and inform them of existing nutrition programs they may be eligible for, has touched and helped thousands and thousands of older persons throughout the country. Many had never been reached before, but Project FIND has enabled them to begin receiving nutrition assistance. Moreover, many of these same older persons are now receiving Medicare benefits and other Federal assistance that they had not known about before Project FIND reached them.

Project FIND's success is not limited solely to the number of persons it assisted, however. The program provides a dramatic example of the leadership role national organizations can take in the field

of aging, especially if given support and encouragement by the Federal government. The Project FUND efforts also underline what can be accomplished when national organizations move to work together on a specific program. A number of local affiliates of other national organizations cooperated with the Red Cross in localities across the nation, and assured that there would be an adequate number of volunteers for the project. The National Urban League played an especially important role in assisting and advising the Red Cross in a number of metropolitan areas.

The American Association of Retired Persons's (AARP) AIM Program (Action for Independent Maturity) is a unique preretirement effort to provide information and advice to men and women between the ages of 50 and 65. The program attempts to offer new ideas and concepts that will enrich people's retirement years, while also providing financial advice to enable retired people to secure their future.

The Boy Scouts of America have developed a detailed plan of action in their "Boypower 76" program to assist older persons. An extensive list of suggestions has been sent to local councils outlining numerous projects that can be undertaken. The plan notes not only ways in which scouts can assist older persons, but also ways in which older persons can assist local scout councils and scouts.

The National Ombudsman Association (N.O.A.) has vigorously promoted the ombudsman concept throughout the country since the White House Conference. A variety of ombudsman functions related to the needs of older persons have proliferated, ranging from education to health, due to the efforts of N.O.A. Volunteers are now being sought from all regional and local agencies concerned with older persons, to help design and disseminate information regarding ombudsman training, and to promote new college and high school courses in which students could earn school credit while helping to deliver better community services as well as learn basic academic skills.

National religious organizations have taken an active role in attempting to carry out the recommendations of the White House Conference. A major development was the creation of the National Inter-Faith Coalition on Aging during the last year in direct response to the Conference and the concerns raised by the delegates with nearly 100 million members. The objectives of the Coalition are: "to develop an awareness by and to vitalize the role of the church and synagogue with respect to their responsibilities in improving the quality of life for the aging; to identify and give priority to those programs and services for the aging which best may be implemented through the resources of the nation's religious sector; to stimulate cooperative and coordinated action between the nation's religious sector and national secular private and public organizations and agencies whose programs and services relate to the welfare and dignity of aging persons; and to encourage the aging to continue giving to society from the wealth of their experiences and to remain active participants in community life."

The Coalition has projected several programs it hopes to undertake. The members plan to assist in the sponsorship of a National Conference on "Spiritual Well-Being" within 2 to 5 years, as recommended by the Conference. The Coalition intends to form an Inter-Faith Legislative Screening Committee to counsel with the U. S. Senate Special Committee on Aging and appropriate committees of the U.S. House of Representatives. The Inter-Faith Coalition also plans to gather a catalogue of data on services and programs for older persons now being offered by religious bodies, encourage a study of death and dying, and develop model projects and programs for older persons that can be accomplished on an inter-faith basis.

National religious organizations have been active in other ways, as well, to assist older persons in response to the White House Conference. The Unitarian Universalist Women's Federation has launched numerous efforts to "raise the consciousness" of local churches and theological schools about the problems older persons face. The Federation has planned a questionnaire slated to be sent to all Unitarian Universalist theological students to determine how they feel their schools are handling education about ministry to the elderly. The Federation is also in the process of locating funds to enable theological schools to add courses on gerontology to their curriculums.

The Synagogue Council of America is moving in two ways to assist older persons. The Council is presently enlisting synagogues to provide space for senior citizen centers. With an eye towards devising new methods of solving the problems older persons face, the Council has also established a National Commission on Aging to develop new and meaningful approaches to those problems.

The National Federation of Temple Sisterhoods has asked all local affiliates to include the elderly in all phases of religious and social activities, and to plan activities specifically for older persons. Meanwhile, the American Baptist Women have resolved that one of their primary concerns will be to meet the needs of the elderly in their own homes.

Several organizations have made special efforts to inform their members about the content of the Conference recommendations, and to encourage them to become involved in being of service to older persons. The Institute of Life Insurance sent a detailed report and analysis on the Conference and its major recommendations to its membership, while the American Home Economics Association has made special attempts to inform its members about the Conference, including a special session on aging at its national meeting in July, and similar sessions at State meetings as well. The Association also published a special position paper on aging outlining the areas in which home economists can make special contributions in the Journal of Home Economists. The National Council on Family Relations recently published a special issue of its journal, The Family Coordinator, devoted to Aging and the Family.

2. "SINCE THE WHITE HOUSE CONFERENCE ON AGING" THE PRIVATE SECTOR

Introduction

Private resources - have expanded substantially the assistance given to elderly persons since the White House Conference on Aging (WHCoA). Although there is no comprehensive measure of the number of people who have benefitted from this effort nor of the effort itself, there are examples of programs, large and small, that have been undertaken in most of the areas of concern to which the WHCoA addressed itself.

Acknowledging that illustrations will have to suffice to characterize the private effort, those that are presented specifically point up activities which relate to selected recommendations for action by WHCoA. Some describe new initiatives; other relate to the expansion of programs which were in existence before the Conference. Mention is made of local and area-wide programs as well as of a number which have been national in scope. Some are strictly private undertakings while others are the result of joint public/private effort. Others portray older people helping their peers. Some of the recommendations pertain to techniques, namely, choice of personnel, locale, and supportive services. Certain of these are illustrated. By these means it is hoped to give a "feel" of the extensive and intensive range of services that are continuing to be planned for and instituted throughout the country at national, state, and local levels.

In order to simplify the presentation, the report is organized into two groups. Group I includes the following categories: Disability and Rehabilitation; Education; Employment/Retirement; Housing and Environment; Nutrition; Physical and Mental Health; Retirement Roles and Activities; Spiritual Well-Being; and Transportation. Group II includes the following categories; Facilities, Programs and Services; Government and Non-Government Organization; Planning; Research and Demonstration; and Training. For purposes of organizing the material, the categories within the groups are treated in alphabetical order.

A. Needs of Older Persons

- (1) Disability and Rehabilitation. Important actions have been taken by organizations in the private sector since the WHCoA on behalf of the deaf, visually impaired, and other disabled older people. The WHCoA recommendations were based on the premise that people with physical handicaps tend to be restricted from full participation in community life and that the fact of aging frequently magnifies the disability. A few examples of the programs undertaken in 1972 to assist disabled older persons participate more fully in community life are cited. Some have been supported in part by Federal funds, but, importantly, many initiatives have come from private organizations.

The National Institute of Senior Centers (NISC) has undertaken two pilot projects to develop techniques for integrating into senior center activities the elderly who are visually handicapped. American Foundation for the Blind, Inc. resource materials are being used. One of the pilot projects is sponsored by the National Conference of Catholic Charities; the other, by the Salvation Army.

A public/private effort to enable the elderly blind to participate more fully in community life has been undertaken in connection with one city-wide project in the expanding RSVP nation-wide program. The American Foundation for the Blind has given a one-year grant to the Community Service Society of New York for a pilot project of incorporating older blind persons into the RSVP program in New York City and to increase the number of visually handicapped volunteers active in SERVE on Staten Island. Both RSVP and SERVE are sponsored by the Community Service Society.

A preventive program is being implemented in Dallas, Texas in the spring of 1973. In a cooperative effort, the American Association of Retired Persons and the North Texas Optometric Society are, with the aid of 30 volunteer optometrists and mass media publicity, carrying out a vision screening program for 2,000 people over 50 years of age.

In a special issue of Hearing and Speech News, the National Association of Hearing and Speech Agencies emphasized the needs of the elderly in these two disability categories. The Omaha, Nebraska QUOTA Club, a local affiliate of QUOTA, International, in 1973 expanded its special project for the elderly and handicapped to include the purchase and donation of wheel chairs for emergency use in ten Omaha Housing Authority units. The Visiting Nurses Association cooperates in the overall project. The National Council of Jewish Women has a continuing program of sheltered workshops for elderly persons.

- (2) Education. National organizations with differing constituencies and purposes have undertaken since the WHCOA activities to carry out some of the recommendations concerned with increasing the educational opportunities available to older persons.

Efforts have also been made in line with education recommendations to enable older people to participate in educational programs. They seem to have been undertaken largely at the community level. An example of a program designed to meet the special needs of older persons is operating in Everett, Washington. There, the Snohomish County Parks and Recreation Department sponsors high school and college courses, but significantly, the classes, taught by faculty from Edmonds Community Center, are held at the Senior Center.

Two examples of Project SCOUT (Senior Citizen Outreach) serve to highlight local efforts designed to increase these opportunities. In Watsonville, California, Project SCOUT conducts English classes to assist Spanish-speaking members of the community. In San Francisco it offers training in handicrafts and merchandising with the products later being sold by the elderly. In a program oriented to Chinatown residents, SELF HELP for the Elderly in San Francisco educates the older persons in nutrition and sound comparative shopping.

- (3) Employment and Retirement. A major recommendation of the WHCoA was that older persons who wish to work should be given the opportunity to do so. The delegates proclaimed, "it is the responsibility of the government to assume the role of employer of last resort to provide meaningful and socially needed employment opportunities for those older workers willing and able to work, if all other programs fail to produce such results."

Several Federal government agencies have shared this responsibility and execute it through funding at the local level. Only a few examples are given here to demonstrate the wide diversity of private organizations which play a role in this form of assistance to older Americans. (The ACTION-developed programs, RSVP and Foster Grandparents, are described in the section on Retirement Roles.) The U.S. Department of Labor funds Senior Aides projects through its Operation Mainstream. Among national voluntary organizations receiving research and demonstration grants to enroll older workers in the Senior Aides projects in public and non-profit agencies are the American Association of Retired Persons, the Federation of Experienced Americans, the Farmers Union (Green Thumb, Inc.), the National Council on the Aging, and the National Council of Senior Citizens, Inc.

In another area of concern, the delegates recommended that pre-retirement counseling by government, employers, unions, and educational institutions should be undertaken and that it should be accomplished with trained instructors. There have been a number of responses to this expression of need.

R.E.A.L. Services in South Bend, Indiana has a program designed to be useful to labor unions, industry, education, and other organizations in their responsibility toward assisting individuals in their transition from a working to a non-working way of life. The Pre-Retirement Institute in Denver, Colorado has trained leaders in over 100 organizations in pre-retirement counseling. In November 1972, ACTION and the National Center for Voluntary Action co-sponsored a one day conference on the "Role of Pre-Retirement Counseling in Volunteer Recruitment." Participating as discussion leaders were representatives of ACTION, NCVA, OEO, AoA, Internal Revenue Service, Veterans' Administration, the University of Michigan, Metropolitan Life Insurance, AARP, The American National Red Cross, the National Council of Senior Citizens, and the United States Postal Service.

In an effort to assist older workers find employment, in Sioux City, Iowa, the Senior Employment Bureau which is sponsored by the Iowa State Employment Service, the Woodbury County Council on Aging, and the Sioux City Volunteer Bureau trains retired older persons to be placement officers for their peers.

The marketability of arts and crafts produced by older people offers some opportunity for employment. The Junior League has been active among national organizations aiding older and retired people to sell their handiwork. This marketing service thereby enables older persons to become self-employed.

- (4) Housing and Environment. Provisions for "a variety of living arrangements" to be made available to meet changing needs of the elderly were deemed necessary by the Conference. Subsequently various national organizations have undertaken projects designed to widen the scope of housing available to older persons.

A variety of essential supportive services in the area of housing are being provided by local community groups. Self Help for the Elderly in San Francisco provides information on available housing and the rights of tenants as well as help in applying for public housing. Kimochi, Inc., also in San Francisco, has sponsored door to door surveys in redevelopment areas to locate those elderly persons requiring assistance. To implement relocation, the Mirror Lake Adult Center in St. Petersburg, Florida provides transportation to examine available housing. The Council for Community Services in Chicago offers help in packing and moving.

A hotline is being planned to help with housing problems. ACTION, through several of its affiliated organizations, has undertaken a pilot project, Listening Post, in the Seattle area. Senior volunteers, trained as "Active Listeners" will have responsibility for information and referral tasks and for data collecting in the field of housing and environment. This is one aspect of an agreement which ACTION made in the Spring of 1972 with HUD, AoA, and NCVA to provide social services to older Americans in federally financed housing.

Research is essential to the provision of suitable housing for the elderly. A three-year research and demonstration project in Fulton County, Georgia is planned to be an applied research program that goes beyond the provision of standard and suitable housing for the elderly poor. Through this project, the Fulton County Department of Family and Children's Services hopes to render social services related to the housing of older persons with all levels of government and numerous voluntary agencies working together to provide these services. On the basis of the first year's efforts, it is expected that the results will show that social changes are needed in the area of housing for the enrichment of the lives of elderly citizens.

- (5) Nutrition. Recommendations for action in the area of nutrition needs for older Americans were based, in part, on the premise that "the search for more efficient and better means of providing for the good nutrition, health and happiness of older people should be a continuous process."

Undoubtedly, Project FIND was the most significant national effort in the area of nutrition for the elderly following the WHCoA. It was a basic step toward "making adequate nutrition available to all elderly persons." Taking place throughout the latter half of 1972, it was a one-time outreach project to locate and enroll hundreds of thousands of eligible elderly in Federal Food Assistance Programs. Four Federal government agencies (ACTION, U. S. Department of Agriculture, Social Security Administration, and the Office of Economic Opportunity) cooperated at the highest level with the private sector resources of the American National Red Cross and the WHCoA Post-Conference Staff. The Red Cross, with the help of many national and local private agencies, recruited 35,000 men and women volunteers to call or visit over 1,000,000 Social Security and Civil Service Retirement recipients who returned cards asking for help in applying for food stamps.

There are also several important by-products of this outreach program. One is that, once known to agencies engaged in community services, these same elderly can be offered additional assistance when necessary. Another is that Project FIND's methodology is expected to be examined to discover guidelines for future programs for the elderly.

A National Conference on Food for the Aging, held in Washington, D.C. in December 1972, was designed in part to plan for implementation of the Recommendations for Action resulting from the WHCoA. It was jointly sponsored by the Community Nutrition Institute, (CNI) the Crusade Against Hunger of the National Council of Churches, the Food Research and Action Center, the National Welfare Rights Organization and the National Council on the Aging, Inc. Papers were presented by national organizations (COA, the Gray Panthers, National Caucus of the Black Aged); by representatives of industry (Giant Foods); by experts from Harvard University and the University of Maryland; by a state agency (Massachusetts); by several representatives of the Administration on Aging; and by the Community Nutrition Institute. Numerous workshops were held within the confines of the Conference, proceedings have been published, and it is expected that the conclusions will be presented to the Senate Committee on Aging as requested. The CNI expects to continue offering technical assistance and hopes to plan specialized conferences on a regional level.

Local communities have been very active in developing many kinds of programs designed to provide proper nutrition for elderly people. Aid is generally of three types: home delivered meals, group meals or "congregate feeding," and nutritional education. The "Interim Report" of the Steering Committee of the National Voluntary Organizations released in October 1972, offers a summary picture of such activities, ongoing or planned, at the community level. Nearly half (30) of 63 reporting local steering committees had in the first half of 1972 either instituted new meals-on-wheels programs, expanded ongoing ones, or were developing such programs.

There are also numerous examples of meals programs reported in news letters of senior centers and councils on aging, in program descriptions filed with the Clearinghouse of the National Center for Voluntary Action, in daily newspapers and other places. Most of them are local volunteer efforts. Facilities for food preparation are frequently churches, hospitals, or homes for the aged. There are examples of older persons themselves volunteering to help in food preparation or transportation. In some programs group dining for those who can come by themselves or can be brought to a central dining area is combined with the meals-on-wheels phase of the community program.

- (6) Physical and Mental Health. The general need of older persons for broad information about good health practices was recognized as one of the necessary provisions of a comprehensive and systematic health care system. A number of new efforts to accomplish this were undertaken during the Year for Action.

A national organization, AARP, has developed the VIM (Vigor in Maturity) program on a nationwide basis. At the community level it must be sponsored by local chapters. It is currently operating in senior centers and other appropriate group settings in selected communities, large and small, in 47 States. The VIM course content covers chronic diseases, nutrition, general health, safety, and the basic principles of mental health. Its effectiveness lies in the use of local lay people with guidance and course outlines provided by the National staff and strong reliance on technically qualified resource people.

Home health aides are an integral part of a comprehensive health care system. In 1972 in Arlington, Virginia, a pilot project was undertaken for homemaker home health aides to assist senior citizens over 60 years of age. It was carried out by the Northern Virginia Service League and the Homemakers Health Aide Service of the Metropolitan Area, Inc.

In the fall of 1972 the National Council of Senior Citizens undertook a national demonstration program, funded by the Health Services and Mental Health Administration, directed specifically to the problems of nursing home patients and their families. In a first step, a project in Michigan is being undertaken with the United Auto Workers' Retirees Council which has worked closely with the Medicare program. It is expected to be developed in other areas at a later date.

A specific example of an on-going local preventive medicine program for older people is the Well-Aging Clinic in Sanford, Maine, sponsored by the Sanford Springvale YMCA and the Community Health Association. It is a specialized medical service within a senior citizen center which makes use of educational materials from the American Medical Association and the Maine State Department of Health Education and Welfare. It is monitored by the local medical society and the local Health Association. Older adults volunteer their services for telephoning and transportation. Some doctors also volunteer though most are paid. It is recognized that the whole community benefits because more serious disabilities and illnesses among the residents are fended off.

In an effort to ensure better quality of health-related devices, Ralph Nader's Retired Professionals Action Group is making an intensive study of the quality of hearing aids.

- (7) Retirement Roles and Activities. The WHCoA Section on Retirement Roles and Activities spoke to the resources that older people offer in terms of talents, skills, experience and time. It also spoke to the need they have for alternatives in the choice of opportunities to continue as contributing members of society. Retirement activities and programming for older persons may be the subject of study, planning, and training by, among others, educational institutions, organizations with missions in the field of aging, membership organizations of older persons, and public agencies at all levels.

Senior centers have become one of the major vehicles through which older people are finding outlets for their talents as well as a resource for their need for companionship and leisure time activities. The National Institute of Senior Centers is making a major contribution to improving the quality of their programming and services and in increasing Senior Center leadership capability. In 1972 it developed a kit on HOW TO ORGANIZE A SENIOR CENTER. Currently, several new aspects are being given attention including technical assistance to expend statewide association, and advice to individual centers on their expansion to include people living in wider geographic areas and the integration of disabled older persons.

Encouraging and enabling older persons to volunteer for community service is receiving increased emphasis from both public and private agencies and organizations. For example, in 1972 the State of Nebraska, through its Department of Welfare, established a Senior Counselor Corps for retired professionals so that they could use their abilities after retirement in service to the State Government on a dollar a year basis. In turn, private agencies can contract for the services of the corps members.

Probably the largest number of publicly developed volunteer programs using the services of older persons are those affiliated with ACTION--RSVP, SCORE, and Foster Grandparents. One of their significant aspects is that they make possible the continuing participation of many older people in a useful capacity because of the small monetary return of their services. This helps to carry out the recommendation of the Section on Retirement Roles which states that "new role opportunities should be designed to serve all segments of the older population...Special effort must be made to include persons who might otherwise be excluded--the impoverished, the socially isolated, the ethnic minorities, the disabled and the disadvantaged."

Although funded by the Federal government, the individual RSVP programs at the community level are sponsored by a broad spectrum of community-level agencies -- both public and private. These include among others the local affiliates of such national voluntary organizations as the AFL-CIO, the American National Red Cross, Catholic Charities, Inc., Kiwanis International, Lions, the National Council of Jewish Women, and the YMCA. Among the other local groups activating RSVP programs are volunteer bureaus, voluntary action centers, health and welfare councils, community action programs, county commissions on aging, area-wide planning councils, city departments of parks and recreation, and senior centers. As of March 1, 1973 individual RSVP programs numbered approximately 275.

ACTION volunteers who work in the Foster Grandparents Program are retired Americans with low income--men and women who must be at least 60. They come from all sections of the nation and from varied backgrounds. They work with disadvantaged children in hospitals, correctional institutions, and residential facilities for mentally retarded, emotionally disturbed, dependent or neglected children. The program expanded dramatically after the President gave it support at the closing session of the WHCoA. As of March 1973, there are Foster Grandparent Programs in all 50 States operating through grants to local, private non-profit organizations and to units of State and local governing bodies. At that time 21,000 children were assisted daily by older retired Americans in 445 child care centers.

In addition to these fairly formalized activities in which older persons may participate, there are a number of other ways in which individuals find outlets for their time and energies. Among the national organizations that aid in the development of programs for retired people are the American Association of Retired Persons, the Diplomatic and Consular Officers Retired, the National Retired Teachers Association, the National Association of Retired Federal Employees, the National Council of Senior Citizens and the National Council on the Aging, Inc.

- (8) **Spiritual Well-Being.** The recommended actions of the WHCoA Section on Spiritual Well-Being designed to enhance the spiritual well-being of older persons were adopted in the light of the body's focus on the philosophy that "the spiritual needs of the aging are really those of every person, writ large: the need for identity, meaning, love and wisdom." Among the efforts to carry out specific recommendation in this area of concern are those of a new national coalition of major religious faiths and a national membership organization, AARP-NRTA.

The National Interfaith Coalition on Aging, Inc. (NICA), organized in 1972, represents 18 religious faiths with nearly 100 million members. Twenty-two religious organizations are charter members. They have the resource support of a Federal government agency, several universities and two national bodies (NCVA and AARP-NRTA).

NICA has called for continuing cooperation with the Administration on Aging and all appropriate governmental and private organizations in order to advance the spiritual well-being of the nation's older persons. Its first undertaking is the development of a catalogue of programs for and with the elderly in all of the participating bodies in order to provide a base for building model programs on their behalf on interfaith basis.

AARP-NRTA has for a number of years given consideration to the spiritual well-being of older people through a participating group of Church Consultants. In a broad expansion of this program in direct follow-up of the WHCoA, these membership groups have been cooperating with the National Interfaith Coalition on Conference recommendations and on other matters; have held ecumenical retirement planning seminars in cooperation with State Councils of Churches; have held seminars to stimulate training programs for religious leaders on spiritual well-being; are working with theological seminaries to improve the competence of students in ministering to the elderly; and have co-sponsored a conference on grief attended by pastors and members of the National Funeral Directors Association.

- (9) Transportation. In New Orleans, Louisiana, there is an example of the public-private sector working together to meet the transportation needs of isolated older people. The New Orleans Areawide Project on Aging has a subcontract with the National Easter Seal Society for Crippled Children and Adults to provide older persons with transportation to and from medical appointments, nutrition centers, clinics and other similar places. Eight vans will be used, five owned by the Project, three by the Society. The staff is comprised of a director, a dispatcher and five drivers.

In Missouri, older people have banded together in cooperatives in order to provide themselves with transportation. Started in January 1972 in eight counties, Cooperative Transportation Service, Inc. (CTS), doubled its membership by June with the addition of nine counties and is still growing. Because of its success it is hoped that it will be operative state-wide. A many-faceted program, it is funded, in part from Federal funds and in part from sale of stock and membership fees, both nominal. Charges for individual trips are minimal, Membership at the end of June 1972 was 3000. Regional committees publicize the venture, recruit members, and organize volunteers to handle requests for service. CTS has contracted with the University of Missouri for computer service and management advice.

As another approach to the transportation problem the first group-ride service ever offered in New York City started in June 1972. Dial-a-Ride is a three year program supported by Federal funds to the New York Office for the Aging. Planning for the experiment was under-taken by means of a contract with the Polytechnic Institute of Brooklyn. The Bronx, with 35,000 people over 65, most with low or middle incomes, was chosen as the pilot area. The New York Private Livery Association, a cooperative composed of 15 small companies is providing non-metered cabs. Rather than paying the cost of an average taxi fare (\$1.50), two or more friends from the same pick-up point can ride anywhere in the four-square mile area of service for 50 cents.

In Raleigh and Wake County, North Carolina, a transportation program has been operating since the middle of 1971 which demonstrates the utilization of volunteer drives for the elderly. During 1972 it augmented its area of effectiveness. The project, Project Helping Wheels, is of particular interest because it has introduced its services into rural as well as urban areas. The number of qualified volunteer drivers has tripled. The Administration on Aging, to signify its satisfaction with the project, began to provide funds to reimburse drivers. With project assistance, reduced fares have been introduced on the public bus line. As a result of the project, there has been interadult club competition to provide the most volunteer driving assistance.

B. Organization Solutions

- (1) Facilities, Programs and Services. The Year for Action was filled with a wide variety of response within the private sector to many of the recommendations of the WHCoA related to needed facilities, programs and services for older persons. Thought, time and energy have been expended by people of all ages in large and small communities to activate them. The Sections related to such specific needs as nutrition, health, education, income, etc. have presented certain programs and projects that have developed. A few additional examples will be cited in an effort to round out the picture.

In order to give older people real choices as to how they shall spend their later years, two important types of supportive services have been made more generally available since the WHCoA. First, the number of senior centers has increased substantially since the Conference. Second, supportive services which enable older people to maintain living arrangements of their choice have multiplied in scope and number throughout the country. Vital resources from the private sector have been applied in both of these approaches, often in cooperation with participating public agencies.

In the whole movement for the development of multi-purpose senior centers, the National Institute of Senior Centers, a program of the National Institute of Senior Centers a program of the National Council on the Aging, Inc., has taken a leading role in improving the quality of programming and services in Senior Centers and in increasing Senior Center leadership capability. The NISC was established in 1970 to consolidate and further develop NCOA's Senior Center program. Following the WHCoA substantial private effort enabled NISC to develop and produce publications to meet the needs of persons working directly with the centers - professional, para-professional, and volunteers. Consultation services also became available. Because of these expanded services to individual centers, the Senior Center constituency of NCOA increased during 1972 from 471 to over 700. Private funding has come from one foundation which has given an enlarged amount for 1973. This funding will go toward the development of training materials, publications related to the changing patterns of Center services, and to technical assistance to expand statewide senior center associations.

A nation-wide effort led by the Steering Committee of National Voluntary Organizations has been undertaken in order to increase the provision of services that help older people remain in or return to their own homes or other places of residence, as recommended by the delegates. This coalition of 138 organizations is attempting to achieve its objective by encouraging efforts by governmental and non-governmental organizations in implementing selective objectives of the White House Conference designing to assist older persons to remain in their own homes. The national Steering Committee

carries out this mission by being instrumental in planning for and/or establishing local steering committees in 288 communities throughout the nation.

Utilizing staff members and resources of the Administration on Aging and the National Center for Voluntary Action in carrying out secretarial, service and research functions, the Steering Committee's efforts are enhanced by public and private support services. At the local level most, if not all, of the local steering committees are comprised of representatives of both the public and private sectors.

An evaluation of local steering committee accomplishments during the first six months of 1972 indicated local services are being developed in the categories of meals programs, centers for day services, transportation, and homemakers more frequently than in other areas of service. A substantial number of the committees were making plans for expansion and geographical extension of on-going services. Because the results of this early period were deemed to be effective by the National Steering Committee, the coalition is expanding the program into additional communities that express interest in joining the effort.

Significant actions have been taken by local affiliates of national organizations to spearhead local programs. One example is the workshop which the Hawaii League of Nursing, an affiliate of the National League of Nursing, co-sponsored in August 1972 with other health organizations. Funded by local foundations, the workshop entitled "Oldsters are People Too" provided a forum for 450 attending senior citizens and health care professionals to express their health care needs and priorities. It had ramifications that could be useful to those planning similar workshops in other areas, namely the designation of topic discussions stemming from the suggestions of senior citizens, the spin-off of smaller workshops in local areas, and the use of the spoken language of the participants in a multi-language venue.

Other examples of local affiliate programs are drawn from the efforts of young people to assist the elderly with some of the necessary supportive services which aid the older person to remain in his familiar environment. They are representative, also, of ways in which young people can gain knowledge about older people. The Gray Panthers represent a coalition of old and young in groups throughout the country, who feel that "agism" -- discrimination against persons solely on the basis of chronological age -- deprives both groups of power and influence. Members focus on action to bring about social change. They are especially concerned with health care, housing, mass transportation, reforms in the Social Security system, and the rights of older people.

- (2) Government and Non-Government Organization. The delegates placed emphasis on the need for widespread correlated efforts between governmental and voluntary services of the highest quality. Many examples have already been given of the cooperative effort that was underway during the "Year of Action" between representatives of government agencies and private organizations at all levels to deliver diverse, needed services to older people. At this time the pattern of activities that has been undertaken to carry out the function of advocacy will be sketched.

Following closely on the conclusion of the WHCoA, the National Council on the Aging, Inc. devoted its annual Conference of National Organizations in April 1972 to the purpose of devising joint strategies by which voluntary organizations could fulfill their future role in influencing national policy regarding the development of a comprehensive system of services and programs for older persons. Means for implementing the recommendations of the WHCoA was to be an integral part of the deliberations. Planning for the Conference was undertaken by, among others, representatives of the National Council on the Aging, American Association of Homes for the Aging, American Federation of Labor and Congress, American Institute of Architects, American Medical Association, American National Red Cross, the Institute of Life Insurance, the National Association of Social Workers, the National Conference of Catholic Charities, National Council of Churches, National Civil Service League, National Council of Homemaker-Home Health Aide Services, Inc., National Welfare Rights Organization, and the Salvation Army.

The burden of the recommendations on advocacy for action to implement the overall recommendations of the WHCoA was that planning, research and the provision of services should be "based on and directly responsive to older Americans' opinions and desires at the grass roots level." Late in the "Year of Action" AARP-NRTA sponsored a national forum for State legislators to discuss the positive actions which could be taken in 1973 by State legislatures. AARP alerted its membership and prepared background papers to identify areas in which States could act to implement valid recommendations. This major undertaking offers evidence that a membership organization with volunteer leadership can take the initiative in a countrywide effort to influence legislation to increase the response to the WHCoA recommendations. The "forum" included members of State legislatures, State Commissioners on Aging, Federal officials and Congressional leaders.

In the Revenue Sharing Act passed by Congress in October 1972 provision was made for funding, at the local government level, of programs and services for "the poor or the aged". Organizations comprised of members falling in these categories were quick to explain this new source of financial support. At the same time they were realistic in urging the need for careful planning by older persons and their advocates to make their needs known. Among the national organizations publishing through their news mediums the significance of the current and long-range effects of revenue sharing were the National Council of Senior Citizens, Inc. and the National Institute of Senior Centers. They joined with four other national organizations of older persons on the local level throughout the country to stress that public and private organizations should work together to develop priority proposals. The other four organizations were the American Association of Retired Persons, the National Association of Retired Federal Employees, the National Caucus of the Black Aged, and the National Retired Teachers Association.

The National Council on the Aging, Inc., in its functions of advocacy of programs to meet the needs of older people, introduces a new publication, Perspective, during 1972.

An example of Federal funding that has been awarded in the area of advocacy for the minority low-income persons is a grant to the National Urban League. Awarded by HEW-AoA-SRS during the winter of 1972, the project is designed to demonstrate in three communities that an Urban League-directed advocacy effort will identify gaps in the existing services of local health, welfare and other services for the lower income minority aged (blacks, browns and poor whites), aid in overcoming their under-utilization of such services, and increase communication between these resources and the poorer elderly citizen.

- (3) Planning. Planning of any consequence for specific categories of people is based on knowledge of where they are. In practice they are located by means of outreach programs. Such programs may be communitywide to service many purposes or they may be designed to locate selected types of people for a single purpose. Both types of programs have developed in various geographical areas since the WHCoA.

Although it is described in some detail in relation to action in the field of nutrition, PROJECT FIND is also mentioned at this time because it was probably one of the most extensive outreach programs ever undertaken on a national basis. It was carried out in the summer and fall of the Year of Action following the WHCoA and combined vast public and private resources. Thousands of persons known to be eligible for participation in Federal Food Assistance Programs were not taking part in them. Federal government agencies undertook the groundwork; the American National Red Cross recruited the national volunteer manpower to mount the program; ACTION enlisted

the cooperation of the public and private agencies dealing with problems of the elderly. The pattern of implementation of Project FIND, due to its broadly based, comprehensive approach is expected to serve as a model for planning and developing large scale programs for older people in the future.

Other outreach programs have taken a communitywide approach. A useful approach for this stage of planning for the development of across-the-board adult services has been prepared under the auspices of two Lutheran organizations, The Development of Adult Services, a service of the Evangelical Lutheran Good Samaritan Society and Lutheran Social Services of South Dakota. The guidelines are oriented to developing services for elderly and handicapped persons in their own homes or communities.

From reports returned to the headquarters of the Steering Committee of the National Voluntary Organizations for Services to Older Persons in Their Own Homes (See discussion under Facilities, Programs and Services) it is known that a number of local participating communities have undertaken outreach or needs surveys as one of their first steps in planning their local community or area-wide programs to serve older people. During the spring of 1972 public agencies, private local organizations, and local affiliates of national voluntary organizations cooperating with local steering committees had undertaken such surveys in 13 of 63 reporting communities of various sizes.

An interesting example of a people-developed outreach program was undertaken in 1972 by the Westside Council of the Voluntary Action Center Council of Santa Clara County, California. Encouraged by VACC to establish the needs of people living in their section of the county, the Westside Council decided that services for older persons should take priority and, subsequently, developed its own survey using a one-page questionnaire addressed to individuals. The questions related to housing, food, medical, health, and transportation.

An area-wide catastrophe in Pennsylvania was responded to by a joint public-private planning effort. As a result of the flood disaster resulting from Hurricane Agnes, many elderly victims were facing serious problems. The Pennsylvania Department of Public Welfare, through the Bureau of Aging, arranged for a one-day conference in January 1973 to "asses the problems," to "develop a strategy for meeting needs," and to "make recommendations to BFA regarding implementation of better services for the elderly victims." A private organization, Community Services of Pennsylvania, under contract to the Department of Public Welfare, developed the format of the conference. Attendees included representatives of the Federal government, national voluntary organizations, the Pennsylvania General Assembly, State and local voluntary

organizations, State departments and commissions. The "needs" proved to be a microcosm of the needs of many elderly people everywhere with the need for "person to person" outreach the greatest factor in the restoration of the older person to community living. Once that was recognized on the basis of previous flood-related studies, those in attendance turned their attention to the "how" of implementation. Many suggestions were offered in terms of organization and planning in the areas of information and referral, housing, etc. Most importantly, however, there was agreement that planning for services can best be done at the local level. What actually will be done is yet to be seen.

Georgia's Department of Human Resources reported on a program, through its Office on Aging's Newsletter, which is representative of a trend that is taking place in many parts of the nation with respect to area-wide planning for the elderly. In the late fall of 1972 it reported that efforts throughout the year had begun to materialize in planning programs for the elderly in some of the States' 18 Area Planning and Development Commissions. Planning grants are given for the purpose of developing area-wide programs to prevent the premature or unnecessary institutionalization of older Georgians by encouraging their continued independence and self-sufficiency. Task forces comprised of older persons, service planners, and representatives of public and private agencies have been formed for the primary purpose of gathering data for program planning, identifying the needs and problems of the elderly, setting priorities for implementation of the program, and determining the local resources for matching funds.

- (4) Research and Demonstration. The preamble to the WHCoA Section on Research and Demonstration affirmed that the time had come to accelerate research efforts aimed at understanding the basic process of aging and alleviating the suffering of those who encounter difficulty in adapting to the phase of life. Only research and demonstration activities concerned with meeting the needs of the elderly are referred to here, and no attempt is made to summarize research programs pertaining to an understanding of the bio-medical and social-behavioral origins of aging and the aging process. Since much of the described research which has been undertaken in the past eighteen months has also had the important by-product of meeting certain recognizable needs, some programs mentioned here have been treated more fully in the appropriate needs sections.

The character of the research and demonstration programs which have been undertaken since the WHCoA can be classified into broad categories including identification of the elderly, methodology of meeting needs, training of both professional and lay personnel to meet the needs, studying alternatives to institutionalization for the elderly, and the dissemination of services.

Identification of the elderly who have distinctive problems is often achieved through outreach programs. A recent project is that undertaken by the Federation of Experienced Americans. Funded by OEO, it will undertake to identify special groups among the elderly poor who have problems not being met by existing Federal programs and to suggest ways of dealing effectively with them. A practical follow-up will be the establishment of prototype resource centers in communities with needs typical of the findings.

In the area of methodology, the Voluntary Action Center in Union County, New Jersey, with a grant from NCVA, is, among other activities, conducting a special research project in which the methods used by 18 private agencies to meet the needs of older people are being analyzed. As a result, reporting forms were revised when necessary, assistance was given in preparing funding application forms, and one agency was assisted in the preparation of a proposal for a Foster Grandparent grant.

A great deal of emphasis since the WHCoA has been placed on efforts to seek alternatives to the institutionalization for the elderly. Duke University Center for the Study of the Aging and Human Development held a conference on the subject in June 1972 as part of a 3-year research and demonstration project. Participating in the conference were representatives of AoA, several universities (Syracuse University School of Social Work, Levinson Gerontological Institute of Brandeis University), the Chairman of the National Caucus on the Black Aged, and Senator Eagleton, a member of the Senate Special Committee on Aging.

Described more fully in the Section on Facilities, Programs and Services but not to be omitted here is the nationwide effort of the Steering Committee of National Voluntary Organizations for Services to Older Persons in Their Own Homes. The Organizations participating number 138; staff functions of the committee are supported in part by a research and development grant to the National Center for Voluntary Action from AoA.

Other tests of alternatives to institutionalization are also underway. AoA has funded five pilot projects in local communities to study the specific alternatives of home care, day hospitals, geriatric day care centers, and arrangements for "families" of older outpatients in private apartments and boarding homes.

Dissemination of Services is another area of study. NCOA has been awarded a grant to study techniques for disseminating education services to older people through the mass media. An advisory committee to the project is composed of specialists in the field of aging, NCOA Board Members (many of whom are affiliated with other national organizations), and leading representatives from the media.

- (5) Training. The recommendations on training growing out of the WHCoA deliberations covered the preparation of personnel to work in services, research, and teaching positions in the field of aging and recognized that in some instances the "trainees" may be the older people themselves.

Educational institutions tend to be the focal point for carrying out the training programs. Underlying all training oriented to the care of and services to older persons is the need for knowledge regarding aging itself. Thus, gerontology is increasingly becoming the subject of study at all levels of education both in generalized and specialized programs. Illustrative of new efforts in this field is the IMPAAC program in which the American Association of Community and Junior Colleges is seeking to mobilize their affiliated institutions to prepare students to work in the field of aging;

Another approach is that of independent home study through correspondence instruction. The Independent Study Department of the University of Missouri, Columbia, affiliated with the National University Extension Association, is giving a course, "Aging in American Society." The course was developed by a participant in WHCoA and, in addition to offering broad background material, makes provision for student to keep up with new developments. The course also offers opportunities for individual research through personal contacts with older persons and agencies and institutions dealing with them.

Training also needs to be planned for those who will engage in specific types of programs. A new center which will focus its efforts on helping the elderly poor with their legal problems is the Western Center of Law and Poverty in Los Angeles, California. It is planned that Community Action Agencies will have an outreach role and that training will be the first step in that role. Outreach workers will serve as lay advocates or "paralegals." Since they must know how to identify the older person's legal problems, they will be trained in this specialty by local Legal Services attorneys in a class setting.

A state government program in leadership training in Connecticut offers a good example of a cooperative public-private effort in the area of training needs. In June 1972 to Connecticut State Department on Aging co-sponsored the fifth annual Statewide Leadership Training Institute at the University of Connecticut at Storrs. Other sponsors were the State Council of Senior Citizens, the United Auto Workers Retired Workers Council, and the University Continuing Education Center.

The Association of University Programs in Hospital Administration sponsored a National Symposium on Long-Term Care Administration Education as a direct follow-up of the WHCoA. Held in January 1972, Task Force members designing the conference from both the public and private sectors included the American Association of Homes for the Aging, the American College of Nursing Homes Administrators, the Community Health Service of DHEW, the Public Health Service, the Gerontological Society, the W. K. Kellogg Foundation, The National Council of Senior Citizens, North Texas State University and members from 37 graduate programs in health and hospital administration. AUPHA said it hoped that the symposium "will provide information needed by curriculum planners in universities, organizations, and governmental agencies at all levels, and will lead to cooperative national strategies."

Three other areas of training in which private organizations participated following the WHCoA underline the high level of activity in this field. National Council on the Aging officials participated in an orientation training session for newly appointed specialists in the field of aging in each of the HUD regional offices. At the same time, the Executive Director of NCOA was named to the HUD Ad Hoc Consumer Relations Committee to represent the needs of the elderly in the field of housing. In Pennsylvania an area-wide service and development project, the Northern Tier Regional Planning and Development Commission, will work in cooperation with community agencies, senior citizens and other citizens, including young people. Among other things, it plans to "provide training for community leaders in developing program projects for senior citizens." Older persons can and do volunteer to serve their peers. Since this usually occurs after they retire, preparation for their new roles is needed at times. A program is currently being developed to train older volunteers which is in direct response to the recommendations of the WHCoA. Participating in it are AARP, NRTA and the Andrus Gerontological Center of the University of Southern California.

* * * *

NCVA Project on Aging

