

MEDICARE TALKING POINTS: 8/20/96

- **I am glad Republicans are finally indicating their interest in protecting and strengthening the Medicare program. Unfortunately, the facts don't back up their rhetoric. In 1994, when I first became President, not one Republican voted for the budget proposal that we enacted, which strengthened the Trust Fund for 3 years.**
- **The Dole/Gingrich 1995 prescription for Medicare would have been deadly. Their \$270 billion Medicare cut was about three times anything ever enacted. These cuts, along with their policy changes that would have separated the healthy from the sick, would have completely undermined the Medicare program.**
- **Had I not vetoed their Medicare proposals, a couple on Medicare would have seen an over \$260 increase in their premiums in this year alone. Over the 7 year budget period, the same couple would have to pay \$1,700 more in premiums than in my balanced budget proposal. These figures may not seem like much to some Republicans, but it could make the difference in being able to purchase a needed prescription. In addition, had I not vetoed their bill, the protections against overbilling Medicare beneficiaries now enjoy would be threatened.**
- **Last year, Senator Dole and Speaker Gingrich proposed \$270 billion in Medicare savings to help pay for their \$245 tax cut. This year we have no idea how much Medicare savings they will use to pay for their over \$500 billion tax cut. The Republicans have refused to reject their past extremely flawed policy that would cause the program to literally "whither on the vine." Although it is not even close to what they would need to finance their irresponsible tax cut, their \$168 billion Medicare savings package from earlier this year threatens the viability of rural and inner city hospitals.**
- **I am proud of my veto of the Dole/Gingrich package and even more proud of my balanced budget that extends the life of the Medicare Trust Fund until 2006. My Medicare savings package of \$124 billion (CBO estimates it to be \$116 billion) and policy changes extends the Trust Fund for ten years from today. It is a responsible savings package that would hold the Medicare per person growth rate to just under what CBO numbers assume is equivalent to the private sector growth rate.**
- **My proposal also modernizes the Medicare program and begins to prepare it for the retirement of the baby boom population. It would:**
 - **Increase the choice of plans for beneficiaries (by adding a new Medicare Preferred Provider Organization option, a new Provider Sponsored Organization alternative, and a new HMO with a point-of-service option);**
 - **Add important and potentially cost-effective preventive benefits (by providing for full coverage of mammography screenings, adding a colorectal screening benefit, and providing for diabetes case management;) and**
 - **Take the first step toward providing a long-term care benefit by establishing a respite benefit for families of beneficiaries afflicted with Alzheimer's Disease.**

MEDICAL SAVINGS ACCOUNT (MSA) TALKING POINTS: 8/20/96

- I worked for months to work out an acceptable compromise on Medical Savings Accounts (MSAs). I consistently stated that I would reject any proposal that provided for an open-ended MSA that was not time-limited or unconstrained in any way.
- The compromise that I signed provides for a 4-year study of a capped amount of MSAs. No expansion of this concept can occur without an affirmative vote by the Congress after it receives this study.
- I wanted to conduct a study on MSAs before considering expanding them to the whole nation. I took this position because many health policy experts believe that these products could undermine the insurance market by separating out healthy populations from less well groups. I felt it quite important that we learn more before recklessly expanding the concept to the entire population.

NOTE: If your position on Medicare MSAs is requested, we would suggest:

- Because the Medicare senior population is so different than the under-65 population and its pool could be hurt much more by companies who were very good about selecting low risk beneficiaries (and avoiding the sick), I am even more concerned about Medicare MSAs. To date, I have not seen a Medicare MSA proposal (trial or otherwise) that I could support.

XII. RESPONSE: SOCIAL SECURITY

Teresa Tritch wrote an article in the April 1996 edition of *Money* on who would be the winners and losers if Social Security were privatized. She concludes that young, high-income workers would gain more than anyone from privatization, middle-income middle-aged workers would "pay dearly" during the transition, and "privatization could easily mean poverty-stricken retirements for low earners, unless they become astute investors." She notes that you "could conceivably outlive your money." *We recommend you stick to the following talking points and not be drawn into a discussion on privatization.*

- **Social Security is One Our Most Successful Programs.** It has helped cut elderly poverty by more than half since the 1960s. In 1966, the poverty rate among our older Americans was 28.5%; today, it is 11.7%.
- **We Have Time To Address Social Security's Long-Term Issues in a Rational and Bipartisan Manner.** Social Security is on firm financial footing well into the next century. It will be able to pay benefits through the year 2029.
- **Social Security's Long-Term Viability Should Be Addressed Within a Bipartisan Process in The Least Political Context Possible.**
- **The Current Social Security Advisory Council Seems To Have Failed To Reach Bipartisan Consensus To Secure Social Security's Long-Term Viability.** Despite months of discussion, the deeply divided Social Security Advisory Council seems to have failed -- it reportedly could not reach consensus on a plan to ensure the program's long-term solvency.
- **Would Be Counterproductive to Comment Now -- in the Middle of an Election Year -- on Specific Elements of Proposals.** Any discussion of specific proposals should take place in the least political context possible where elements are judged in the context of overall bipartisan plans to secure Social Security.
- **But We Do Have Some Guiding Principles:** *Social Security must remain a safety net for all Americans and its financing must be sound and prudent.*
 - *Oppose moving to a voluntary or private system that would put retirement at risk.*
 - *Oppose Proposals That Would Make It Less Dependable for All Recipients.*

TALKING POINTS ON SOCIAL SECURITY

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But We Do Have Some Guiding Principles: *Social Security must remain a safety net for all Americans and its financing must be sound and prudent.*

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Q&A ON MSNBC INTERVIEW AND SOCIAL SECURITY PRIVATIZATION

Q: Mr. President, in your MSNBC interview with Tom Brokaw on July 15, 1996, you seemed to open the door to supporting some sort of testing privatizing a portion of Social Security as a demonstration project. Is this what you meant?

A: No. I made three points in that interview:

- 1. Social Security ought to be addressed within a bipartisan process in the least political context possible as in 1983:** I made clear that I support a bipartisan independent process such as the one in 1983 to consider the steps that need to be taken to keep the Social Security system strong in the long term. Unfortunately, the current Social Security Advisory Council seems to have failed -- it reportedly could not reach consensus on a bipartisan plan to ensure the program's long-term solvency.
- 2. I would oppose privatization or anything that would put older Americans at serious risk:** I made clear that complete privatization would not be dependable enough for many older Americans and would put them "at serious risk."
- 3. I'm willing to study ideas, but I will not support implementing ideas that change Social Security without careful study, testing and review:** I did not mean to propose experimenting with privatizing a portion of the Social Security system.

Q: But your statement seems to imply that your don't want sweeping changes or complete privatization until you have experimented with some partial privatization that can be studied or tested.

A: I have not proposed nor do I support any proposals for any type of privatization. What I was saying was that within the context of a bipartisan commission or process like the one in 1983, new ideas should only be considered that are carefully tested before implemented, and that if new ideas are to be considered I would want careful study and even testing before we take any risks with a program that has worked so well for the American people.

XIII. PENSIONS

ACCOMPLISHMENTS: We've been working to protect people's pensions from the start of the Administration, and getting results.

- o **Won enactment of the Retirement Protection Act in 1994** to protect the benefits of more than 40 million American workers and retirees in traditional pension plans. Pension underfunding has declined dramatically for the first time in a decade.
- o **Recovered nearly \$10 million in savings for workers and retirees** as a result of the Labor Department's ongoing nationwide enforcement effort to protect retirement savings in defined contribution -- 401(k) -- plans.
- o **Vetoed the Republican budget that would have allowed corporations to raid \$15 billion from pension funds**, affecting almost 4 million workers. In the 1980s, corporations took over \$20 billion from pension funds.
- o **The minimum wage bill just signed into law contains important pension coverage, portability, and security reforms, many of which we had proposed.**
 - o **Creates a new small business 401(k) plan** which can be started with a simple one-page form. Up to 10 million small business workers without a pension could be eligible for a pension under this new plan. [Note: the law contains the Dole plan, which was similar to yours but does not provide as generous benefits to low- and middle-income workers.]
 - o **Simplifies 401(k) plans for all businesses;**
 - o **Discourages 1-Year Wait:** Encourages employers to allow employees to start saving for retirement from the first day on the job by changing the law that encouraged waiting periods;
 - o **Protects government employees' savings from Orange County-Style Fiascos** by requiring that these state and local government plans be held in trust.

REMAINING AGENDA:

- o **Expand coverage and portability by enacting our IRA proposal** which doubles the income limits and allows penalty-free withdrawals for education, first homes, major medical expenses, and long-term unemployment.
- o **Enact our Audit Bill to increase pension security** by requiring administrators to report promptly any serious misuse of pension funds.
- o **Continue and expand the on-going retirement savings campaign** begun in 1995 by the Labor Department and 150 private co-sponsors. In 1996, DOL launched a special addition to the program focusing on women's particular pension needs.
- o **Issue the first U.S. government inflation-protected bonds**, providing a totally safe investment for retirement or education that will not lose value due to inflation. [Treasury has not yet determined when it will issue the first bonds.]

PRESIDENT BILL CLINTON

MEETING AMERICA'S CHALLENGE TO PROTECT AND HONOR OUR PARENTS AND GRANDPARENTS

"I think we're obligated to balance this budget to take the debt off our children and our grandchildren, but we're obligated to do it in a way that represents -- that reflects our responsibility to our parents and our grandparents..." -- President Clinton

FIGHTING TO PROTECT MEDICARE AND MEDICAID

- **Fighting Drastic Republican Cuts** in Medicare and Medicaid that will shift a staggering financial burden to elderly and disabled Medicare beneficiaries; and reduce Medicaid nursing home coverage for hundreds of thousands of elderly and disabled.
- **Long-Term Care** -- Opposing Republican proposals to reduce Medicaid long-term care coverage and to repeal enforcement of quality standards for nursing homes. Consistently supported expanding state administered home and community-based care services, tax clarifications and consumer standards for private long-term care insurance, and penalty-free withdrawals from IRAs to pay for long-term care.
- **Making Medicare and Medicaid Responsive to Beneficiary Needs** -- Worked to strengthen and improve Medicare and Medicaid by combating fraud and abuse, enhancing quality, and supporting an expansion of managed-care options to increase choices for beneficiaries -- not as a smokescreen for deep and arbitrary cuts. Proposed providing more preventive services and a respite care benefit for families of victims of Alzheimer's disease under Medicare.

PROMOTING ECONOMIC SECURITY

- **A Stable Social Security System** -- Committed to preserving Social Security benefits and ensuring the long-term integrity of the Trust Fund. The President stated benefits should not be used to balance the budget or pay for tax cuts for the wealthy.
- **A Reliable Pension System** -- Proposed the Retirement Savings and Security Act to help Americans save for retirement by increasing pension portability, enhancing pension protection and expanding coverage. Signed the Retirement Protection Act so that workers and retirees can count on receiving the pension they have earned.

STRENGTHENING SUPPORTIVE SERVICES AND OPPORTUNITIES

- **Older Americans Act** -- Proposed reauthorization of Older Americans Act to renew and strengthen critical Meals on Wheels, transportation, senior community employment, and ombudsman services. Fighting to keep the program intact.
- **Senior Service Corps** -- Fighting to support and protect the Corporation for National Service's Senior Service Programs -- Foster Grandparents, Senior Companions, and the Retired Senior Volunteer Program.

BRINGING SENIORS TO THE TABLE

- **Elevation of Commissioner of Aging** to Assistant Secretary status.
- **1995 White House Conference on Aging** -- Called for the fourth White House Conference on Aging, after the 1991 Conference failed to take place. *May/1996*

CLINTON ADMINISTRATION ACCOMPLISHMENTS ON BEHALF OF SENIOR CITIZENS

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HIGHLIGHTS OF ADMINISTRATION ACCOMPLISHMENTS FOR OLDER AMERICANS

Heightening the Importance of Seniors Issues

- Elevation of Commissioner of Aging. President Clinton elevated the position of Commissioner on Aging to Assistant Secretary status to make certain the interests and concerns of older Americans are at the table when decisions are made.
- White House Conference on Aging. Recognizing the unfulfilled need to create a strategic plan for aging to guide us into the 21st century, President Clinton called for the 1995 White House Conference on Aging, after the 1991 Conference failed to take place.

Restoring Economic Security. After 12 years of trickle down economics which quadrupled the deficit and limited opportunity, the President fought to enact the largest deficit reduction package in history, reducing the deficit three years in a row, by over \$600 billion. In just over two years, President Clinton's economic strategy has triggered the best combination of robust job creation and low inflation in 25 years. President Clinton is committed to promoting economic security and opportunity across generations.

- Stable Social Security System. The Administration is committed to preserving the Social Security program. The President will not support proposals that use Social Security benefits to balance the budget or pay for tax cuts for the wealthy. And the President will work with the bipartisan Advisory Council on Social Security to preserve the long-term integrity of the Social Security Trust Fund.
- Bolstering Public Confidence. The Administration worked with Congress to make the Social Security Administration an independent agency. Now SSA is working hard to improve customer service and satisfaction -- through an 800 number, by reducing the number of pending disability claims and by mailing Personal Earnings and Benefit Estimate Statements (PEBES) so Americans know the retirement benefits they can expect.
- Reliable Pension System. President Clinton signed the 1994 Retirement Protection Act so that workers and retirees can count on receiving the pensions they have earned.

- The Pension Benefit Guaranty Corporation has improved its service to retirees receiving benefits from terminated plans, and has initiated a "Know Your Pension" outreach campaign so workers can understand their retirement benefits and PBGC's guarantee.
- Enhanced IRAs. The President's Middle Class Bill of Rights would expand the availability of deductible Individual Retirement Accounts (IRAs) to millions more middle income families, and allow them to withdraw contributions tax-free for long-term care expenses, the cost of education, first time home buying, or medical expenses.
- Access to Home Equity. The Administration has continued to support and expand the Home Equity Conversion Mortgage, which allows seniors to use the equity in their homes to meet their financial needs, without having to sell their homes or move. This program has helped over 11,000 seniors -- 60 percent of whom are women living alone, and the numbers are increasing. The Administration has joined with the AARP to urge Congress to renew the program when it expires at the end of September.
- Health Reform Even with Medicare and Medicaid, out-of-pocket health care costs for older Americans living on fixed incomes are more than three times higher than the rest of the population. That is why the Administration continues to fight for first steps in health reform, expanded long term care, and a strengthened Medicare program.

Health Security. President Clinton will continue to fight for health security for all Americans and to contain health care costs for families, businesses, and government. As he has consistently stated, there are first steps that can be taken this year such as reforming the insurance market and helping families provide long-term care for a sick parent or disabled child.

- Fighting Republican Cuts. The President is strongly opposed to proposals to cut the Medicare and Medicaid programs to balance the budget or pay for tax cuts for the wealthy.
- Strengthening Medicaid and Medicare. At the same time, the Clinton Administration has worked to strengthen and improve the Medicare and Medicaid programs by combating fraud and abuse, enhancing quality, and promoting preventive services. The First Lady has initiated a campaign to promote the use of mammography screening by older women to detect and prevent breast cancer.

Improving Long Term Care. The Clinton Administration knows the critical importance of long term care to the elderly, people with disabilities of all ages, and their families. That is why the President has consistently supported expanding state administered home care services, tax clarifications and consumer standards for private long term care insurance, and penalty-free withdrawals from IRAs to pay for long term care services.

Strengthening Housing and Supportive Services. The Clinton Administration is increasing housing opportunity, creating stronger neighborhoods and cities, and fostering fair housing for all Americans, giving special attention to senior housing needs. The Administration has strengthened and streamlined the Non-Profit Elderly Housing Section 202 Program, and is working to link housing for the aged with supportive services.

- Older Americans Act. The Reauthorization of the Older Americans Act programs provides an opportunity to renew and strengthen critical services such as home delivered meals, transportation, elder abuse prevention, and legal and advocacy services. The Clinton Administration will fight to keep the programs strong and intact.

Increasing Education and Service Opportunities. Because education is the key to preparing Americans for the new economy, President Clinton is expanding opportunities for lifelong education: From pre-school to youth apprenticeship to direct lending for college loans to National Service to training for a new job in mid-career.

- Senior Service Corps. President Clinton sees older Americans as a reservoir of talent and experience. He forged a bipartisan effort to establish the Corporation for National and Community Service to provide an outlet for this talent and experience and to rekindle the ethic of service in America. He will fight to support and protect the Corporation's National Senior Service Corps programs -- Foster Grandparents, Senior Companions, and the Retired Senior Volunteer Program (RSVP).

Fighting Crime. To make Americans more secure at home, President Clinton fought the special interests to enact a tough Crime Bill last year which put 100,000 police on the streets, bans deadly assault weapons, expands the death penalty, and supports smarter prevention efforts which offer young people a way out of the cycle of drugs and violence.

- The Crime Bill provides special protection to the elderly by taking tough measures against telemarketing fraud -- increasing penalties if people over age 55 are targeted, and requires criminal background checks for people employed in caring for the elderly or disabled.

- The Administration is bolstering these Crime Bill initiatives through aggressive health care fraud enforcement, a "Safe Return Program" to help locate and protect missing Alzheimer's Disease patients, and increased funding for Elder Abuse Prevention programs.

Expanding Research. Support for research initiatives that focus on the special needs and concerns of older Americans has been expanded in agencies across the Administration -- from Alzheimer's disease research at the National Institutes of Health to aging research and geriatric training at the Department of Veterans Affairs.

PRESIDENT CLINTON: WORKING FOR OLDER AMERICANS

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President Clinton, State of the Union, 1995

"My position is, I haven't and don't support cuts in Social Security, and I would support savings in the Medicare program only if they're used to advance the cause of health care."

President Clinton, October 23, 1994

BRINGING SENIORS TO THE TABLE *Our nation's seniors are central to our communities. The Clinton Administration is committed to addressing the concerns of Older Americans and including them in decision-making.*

- Elevation of Commissioner of Aging. President Clinton elevated the position of Commissioner on Aging to Assistant Secretary status to make sure the interests and concerns of older Americans are at the table when decisions are made.
- 1995 White House Conference on Aging. President Clinton demonstrated his commitment to older Americans by calling for the fourth White House Conference on Aging, after the 1991 Conference failed to take place.

PROMOTING ECONOMIC SECURITY *People who work hard and play by the rules should be rewarded. The Clinton Administration is committed to promoting economic security and opportunity across generations.*

- A stable Social Security System The Administration is committed to preserving Social Security benefits and ensuring long-term integrity of the Trust Fund. Social Security benefits should not be used to balance the budget or pay for tax cuts for the wealthy.
- Bolstering Public Confidence By strengthening and streamlining the program, we're bolstering public confidence in Social Security. We worked with the Congress to make SSA an independent agency, and now SSA is working hard to improve customer service and satisfaction -- through its 800 number, by reducing the number of pending disability claims and by mailing Personal Earnings and Benefit Estimate Statements (PEBES) so Americans know the retirement benefits they can expect.
- A Reliable Pension System People deserve a pension system that they can rely on -- so President Clinton signed the Retirement Protection Act in December 1994. Now, workers and retirees will be able to count on receiving the pensions they have earned.
- Enhanced IRAs The President's Middle Class Bill of Rights allows people to set up an Individual Retirement Account and withdraw it tax-free for the cost of education... or first time home buying... or the care of a parent... or health care.

THE CLINTON ADMINISTRATION CONTINUES TO FIGHT FOR REAL HEALTH CARE REFORM *We remain firmly committed to guaranteeing health security to all Americans and to containing health care costs for families, businesses and federal, state and local governments.*

- First Steps As the President has consistently stated, this year we can take the first steps. The Congress can, and should, reform the insurance market; make coverage affordable for working families; help workers who lose their jobs keep their health insurance; continue the start made already to level the playing field for the self-employed; and **help families provide long-term care** for a sick parent or a disabled child.
- Long Term Care We know that long-term care is of critical importance to the elderly. That's why we have consistently supported expanding state administered home care services. It's also why we support tax clarifications for private long-term care insurance and consumer standards for long-term care so that insurance policies are worth more than the paper they're written on.
- Fighting Republican Cuts We're fighting to protect health care for mothers, children, the disabled and aged Americans. Republicans want to cut Medicare by about \$250 billion and federal Medicaid spending by about \$160 billion between now and 2002. These cuts will mean shifting a staggering financial burden to elderly and disabled Medicare beneficiaries; dropping coverage or shrinking benefits for the elderly, disabled, or mothers and children on Medicaid; and significant cuts in payments to hospitals, physicians and other providers.
- Making Medicare and Medicaid Responsive to Beneficiary Needs We're supportive of an expansion of managed care options to increase choices for beneficiaries -- not as a smokescreen for deep and arbitrary cuts. And, we're streamlining regulations and cutting paperwork.
- Health Reform Critical to Deficit Reduction The President has consistently said that we cannot get a hold of the deficit without passing meaningful health reform. Over the next five years alone, almost 40 percent of the growth in total federal spending will come from rising costs in federal health care programs. We must contain costs in these programs. But we must do it as we reform our health care system as a whole -- not by arbitrarily cutting programs that serve the most vulnerable Americans.

A BETTER QUALITY OF LIFE *The Administration is committed to fighting for a better quality of life -- safe streets, high-quality and affordable education for everyone, and making services available where they're needed most -- at the community level.*

- Fighting Crime The Administration passed the smartest, toughest, and most comprehensive Anti-Crime bill in this country's history... a bill that provides police, prisons, punishment and prevention... so that the streets families live on are safer.

- Education President Clinton has signed the Student Loan Reform Act, Goals 2000, School-to-Work and expanded Head Start. His "Middle Class Bill of Rights" calls for tax cuts for parents trying to put their kids through school... and a \$500 tax cut for families with children under 13.
- Promoting community service 20,000 young people are devoting their time to community service through the Administration's Americorps; some work with seniors in their community. And, Senior Corps programs like Foster Grandparent and the Retired and Senior Volunteer Program boast 526,000 participants.
- Reinventing Government The Administration has eliminated 102,000 jobs and continues to cut obsolete regulations; reward results, not red tape; taking power away from federal bureaucracies and giving it back to communities.

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CLINTON ADMINISTRATION ACCOMPLISHMENTS ON BEHALF OF SENIOR CITIZENS

- quote -

FIGHTING TO PROTECT MEDICARE AND MEDICAID

● **Fighting Republican Cuts** in Medicare of \$270 billion and in Medicaid of \$182 billion between now and 2002. These cuts will shift a staggering financial burden to elderly and disabled Medicare beneficiaries; and reduce Medicaid nursing home coverage for hundreds of thousands of the elderly and disabled.

● **Long Term Care** -- Opposing Republican proposals to reduce Medicaid long term care coverage and to repeal quality standards for nursing homes. Consistently supported expanding state administered home and community based care services, tax clarifications and consumer standards for private long-term care insurance, and penalty-free withdrawals from IRAs to pay for long-term care.

● **Making Medicare and Medicaid Responsive to Beneficiary Needs** -- Worked to strengthen and improve Medicare and Medicaid by combating fraud and abuse, enhancing quality, and promoting preventive services. Supported an expansion of managed care options to increase choices for beneficiaries -- not as a smokescreen for deep and arbitrary cuts. Proposed providing a respite care benefit under Medicare for families of victims of Alzheimer's disease.

PROMOTING ECONOMIC SECURITY

● **A Stable Social Security System** -- Committed to preserving Social Security benefits and ensuring the long-term integrity of the Trust Fund. The President stated benefits should not be used to balance the budget or pay for tax cuts for the wealthy.

● **A Reliable Pension System** -- Signed the Retirement Protection Act in December 1994. Now workers and retirees will be able to count on receiving the pension they have earned.

STRENGTHENING SUPPORTIVE SERVICES AND SERVICE OPPORTUNITIES

● **Older Americans Act** -- Proposed reauthorization of Older Americans Act to renew and strengthen critical Meals on Wheels, transportation, senior community employment, and ombudsman services. Fighting to keep the program intact.

● **Senior Service Corps** -- Fighting to support and protect the Corporation for National Service's Senior Service Programs -- Foster Grandparents, Senior Companions, and the Retired Senior Volunteer Program

BRINGING SENIORS TO THE TABLE

● **Elevation of Commissioner of Aging** to Assistant Secretary status.

● **1995 White House Conference on Aging** -- Called for the fourth White House Conference on Aging, after the 1991 Conference failed to take place.

HIGHLIGHTS OF ADMINISTRATION ACCOMPLISHMENTS FOR OLDER AMERICANS

Heightening the Importance of Seniors Issues

- ✓ ● Elevation of Commissioner of Aging. President Clinton elevated the position of Commissioner on Aging to Assistant Secretary status to make certain the interests and concerns of older Americans are at the table when decisions are made.
- ✓ ● White House Conference on Aging. Recognizing the unfulfilled need to create a strategic plan for aging to guide us into the 21st century, President Clinton called for the 1995 White House Conference on Aging, after the 1991 Conference failed to take place.

Restoring Economic Security. After 12 years of trickle down economics which quadrupled the deficit and limited opportunity, the President fought to enact the largest deficit reduction package in history, reducing the deficit three years in a row, by over \$600 billion. In just over two years, President Clinton's economic strategy has triggered the best combination of robust job creation and low inflation in 25 years. President Clinton is committed to promoting economic security and opportunity across generations.

- ✓ ● Stable Social Security System. The Administration is committed to preserving the Social Security program. The President will not support proposals that use Social Security benefits to balance the budget or pay for tax cuts for the wealthy. And the President will work with the bipartisan Advisory Council on Social Security to preserve the long-term integrity of the Social Security Trust Fund.
- Bolstering Public Confidence. The Administration worked with Congress to make the Social Security Administration an independent agency. Now SSA is working hard to improve customer service and satisfaction -- through an 800 number, by reducing the number of pending disability claims and by mailing Personal Earnings and Benefit Estimate Statements (PEBES) so Americans know the retirement benefits they can expect.
- ✓ ● Reliable Pension System. President Clinton signed the 1994 Retirement Protection Act so that workers and retirees can count on receiving the pensions they have earned.

- The Pension Benefit Guaranty Corporation has improved its service to retirees receiving benefits from terminated plans, and has initiated a "Know Your Pension" outreach campaign so workers can understand their retirement benefits and PBGC's guarantee.
- Enhanced IRAs. The President's Middle Class Bill of Rights would expand the availability of deductible Individual Retirement Accounts (IRAs) to millions more middle income families, and allow them to withdraw contributions tax-free for long-term care expenses, the cost of education, first time home buying, or medical expenses.
- Access to Home Equity. The Administration has continued to support and expand the Home Equity Conversion Mortgage, which allows seniors to use the equity in their homes to meet their financial needs, without having to sell their homes or move. This program has helped over 11,000 seniors -- 60 percent of whom are women living alone, and the numbers are increasing. The Administration has joined with the AARP to urge Congress to renew the program when it expires at the end of September.
- Health Reform Even with Medicare and Medicaid, out-of-pocket health care costs for older Americans living on fixed incomes are more than three times higher than the rest of the population. That is why the Administration continues to fight for first steps in health reform, expanded long term care, and a strengthened Medicare program.

Health Security. President Clinton will continue to fight for health security for all Americans and to contain health care costs for families, businesses, and government. As he has consistently stated, there are first steps that can be taken this year such as reforming the insurance market and helping families provide long-term care for a sick parent or disabled child.

- ✓ ● Fighting Republican Cuts. The President is strongly opposed to proposals to cut the Medicare and Medicaid programs to balance the budget or pay for tax cuts for the wealthy.
- ✓ ● Strengthening Medicaid and Medicare. At the same time, the Clinton Administration has worked to strengthen and improve the Medicare and Medicaid programs by combating fraud and abuse, enhancing quality, and promoting preventive services. The First Lady has initiated a campaign to promote the use of mammography screening by older women to detect and prevent breast cancer.

✓ **Improving Long Term Care.** The Clinton Administration knows the critical importance of long term care to the elderly, people with disabilities of all ages, and their families. That is why the President has consistently supported expanding state administered home care services, tax clarifications and consumer standards for private long term care insurance, and penalty-free withdrawals from IRAs to pay for long term care services.

✓ **Strengthening Housing and Supportive Services.** The Clinton Administration is increasing housing opportunity, creating stronger neighborhoods and cities, and fostering fair housing for all Americans, giving special attention to senior housing needs. The Administration has strengthened and streamlined the Non-Profit Elderly Housing Section 202 Program, and is working to link housing for the aged with supportive services.

- ✓ ● Older Americans Act. The Reauthorization of the Older Americans Act programs provides an opportunity to renew and strengthen critical services such as home delivered meals, transportation, elder abuse prevention, and legal and advocacy services. The Clinton Administration will fight to keep the programs strong and intact.

Increasing Education and Service Opportunities. Because education is the key to preparing Americans for the new economy, President Clinton is expanding opportunities for lifelong education: From pre-school to youth apprenticeship to direct lending for college loans to National Service to training for a new job in mid-career.

- ✓ ● Senior Service Corps. President Clinton sees older Americans as a reservoir of talent and experience. He forged a bipartisan effort to establish the Corporation for National and Community Service to provide an outlet for this talent and experience and to rekindle the ethic of service in America. He will fight to support and protect the Corporation's National Senior Service Corps programs -- Foster Grandparents, Senior Companions, and the Retired Senior Volunteer Program (RSVP).

Fighting Crime. To make Americans more secure at home, President Clinton fought the special interests to enact a tough Crime Bill last year which put 100,000 police on the streets, bans deadly assault weapons, expands the death penalty, and supports smarter prevention efforts which offer young people a way out of the cycle of drugs and violence.

- The Crime Bill provides special protection to the elderly by taking tough measures against telemarketing fraud -- increasing penalties if people over age 55 are targeted, and requires criminal background checks for people employed in caring for the elderly or disabled.

- The Administration is bolstering these Crime Bill initiatives through aggressive health care fraud enforcement, a "Safe Return Program" to help locate and protect missing Alzheimer's Disease patients, and increased funding for Elder Abuse Prevention programs.

Expanding Research. Support for research initiatives that focus on the special needs and concerns of older Americans has been expanded in agencies across the Administration -- from Alzheimer's disease research at the National Institutes of Health to aging research and geriatric training at the Department of Veterans Affairs.

Additional Background on Specific Issues

1995 White House Conference on Aging. The Conference was considered a success on many fronts -- including logistically, press coverage, and support from participants. The fifty resolutions adopted by the delegates are very consistent with the policy proposals the Administration has been advocating -- support for health reform, long term care (the single biggest applause line in the President's speech was after his call for improved home and community-based care options), older volunteers, prevention/health promotion; crime prevention.

Social Security Solvency According to the last Trustees report, the Social Security Trust Fund will remain solvent for the next 35 years (until 2030). The Administration is committed to preserving the Social Security program and ensuring its long term financial stability. Since there is no immediate crisis, however, there is time to carefully develop the proposals that will ensure solvency for our children and grandchildren.

Social Security Advisory Council. The President's Advisory Council on Social Security is currently laying the groundwork for a secure Trust Fund by considering proposals that address the long term solvency of the program. The Council is expected to submit recommendations to the President this fall.

Note -- purely for background: The Council has begun considering specific proposals and there is significant difference of opinion on what should be done. There is speculation that the Council will not be able to reach a consensus on recommendations, particularly because of division on big issues such as increasing the retirement age or proposing additional revenues. The Council meets next July 27-8 in Washington.

While there was a Washington Post story about the Council's May 19-20 meeting and the difference of opinions among members, there appears to be little press about the Council outside of Washington.

Republican Budget Proposals and the Senior Service programs. Nearly one-half million older Americans serve in the Corporation for National Service's National Senior Service Corps (NSSC) -- in programs such as Foster Grandparents, Senior Companions, and the Retired and Senior Volunteer Program (RSVP). These programs are very popular -- waiting lists exist at every site of both people wanting to serve and of individuals seeking the services of senior volunteers. Yet the Republican budget proposals would eliminate the Corporation for National Service, and the Rescission bill would cut the program by \$210 million.

Older Americans Act. 1995 is the 30th Anniversary of the Older Americans Act (OAA), a very popular program that provides a range of services to older Americans, particularly those at risk of losing their independence. Services provided under the OAA include: nutrition (meals on wheels and congregate nutrition sites), health promotion, legal assistance, and elder abuse prevention. Programs are offered through 670 Area Agencies on Aging nationwide.

Proposals to block grant or fragment the Older Americans Act have been floated on the Hill, much to the concern of the seniors community. Thus, there is good response to expressions of Administration commitment to keeping the program strong and intact.

The Older Americans Act (OAA) is slated for reauthorization this year. Pending OMB approval, HHS will have a bill ready to go to the Hill in the near future.

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E X E C U T I V E O F F I C E O F T H E P R E S I D E N T

28-Sep-1995 03:03pm

TO: Molly Brostrom

FROM: Andre Oliver
Office of Communications

SUBJECT: RE: do either of you have any edits/thoughts on the followin

g.thx
SUBJECT: _____

This looks fine to me, although I have a couple comments/questions:

- In the Medicare/Medicare sections, do you want to use some of the hard hitting numbers from the budget group's latest talking points, like:

- Their Medicaid plan will force states to eliminate coverage for 8.8 million Americans, including 4.4 million children, 900,000 seniors and 1.4 million with disabilities

- Their Medicare plan will mean \$1,700 less per beneficiary in 2002; double deductibles; raise premiums

- All this to pay for tax cuts for the wealthy

I'll also forward your draft to Marilyn for her comments.

Andre

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President Clinton, State of the Union, 1995

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= OAA. Will fight to keep intact.
- new title on elder abuse ; TV → training; empl progs

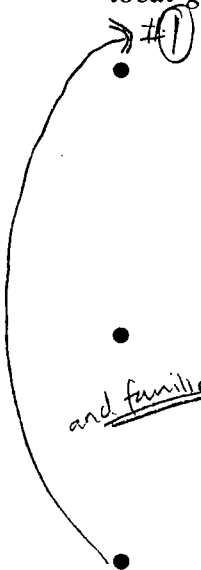
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Older ♀ → No ec security to begin with ; caregiver
- check w/OWL

2x the limit
as before
Mid Class
Bill of Rights

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 - Health Reform Critical to Deficit Reduction The President has consistently said that we cannot get a hold of the deficit without passing meaningful health reform. Over the next five years alone, almost 40 percent of the growth in total federal spending will come from rising costs in federal health care programs. We must contain costs in these programs. But we must do it as we reform our health care system as a whole -- not by arbitrarily cutting programs that serve the most vulnerable Americans.

A BETTER QUALITY OF LIFE *The Administration is committed to fighting for a better quality of life -- safe streets, high-quality and affordable education for everyone, and making services available where they're needed most -- at the community level.*

- Fighting Crime The Administration passed the smartest, toughest, and most comprehensive Anti-Crime bill in this country's history... a bill that provides police, prisons, punishment and prevention... so that the streets families live on are safer.

- Education President Clinton has signed the Student Loan Reform Act, Goals 2000, School-to-Work and expanded Head Start. His "Middle Class Bill of Rights" calls for tax cuts for parents trying to put their kids through school... and a \$500 tax cut for families with children under 13.
- Promoting community service 20,000 young people are devoting their time to community service through the Administration's Americorps; some work with seniors in their community. And, Senior Corps programs like Foster Grandparent and the Retired and Senior Volunteer Program boast 526,000 participants.
- Reinventing Government The Administration has eliminated 102,000 jobs and continues to cut obsolete regulations; reward results, not red tape; taking power away from federal bureaucracies and giving it back to communities.

4/26/95b

PRESIDENT CLINTON: WORKING FOR OLDER AMERICANS

"Our senior citizens have made us what we are."

President Clinton, State of the Union, 1995

"My position is, I haven't and don't support cuts in Social Security, and I would support savings in the Medicare program only if they're used to advance the cause of health care."

President Clinton, October 23, 1994

BRINGING SENIORS TO THE TABLE *Our nation's seniors are central to our communities. The Clinton Administration is committed to addressing the concerns of Older Americans and including them in decision-making.*

- Elevation of Commissioner of Aging. President Clinton elevated the position of Commissioner on Aging to Assistant Secretary status to make sure the interests and concerns of older Americans are at the table when decisions are made.
 - 1995 White House Conference on Aging. President Clinton demonstrated his commitment to older Americans by calling for the fourth White House Conference on Aging, after the 1991 Conference failed to take place. *Expected that resolutions will be developed into aging policy for next 10 yrs. Admin reaffirmed commitment by signing Older Americans Month proclamation for 93 to 94 to seniors & the contributions they make to our nation.*
- PROMOTING ECONOMIC SECURITY** *People who work hard and play by the rules should be rewarded. The Clinton Administration is committed to promoting economic security and opportunity across generations.*

- A stable Social Security System The Administration is committed to preserving Social Security benefits and ensuring long-term integrity of the Trust Fund. Social Security benefits should not be used to balance the budget or pay for tax cuts for the wealthy.
- Bolstering Public Confidence By strengthening and streamlining the program, we're bolstering public confidence in Social Security. We worked with the Congress to make SSA an independent agency, and now SSA is working hard to improve customer service and satisfaction -- through its 800 number, by reducing the number of pending disability claims and by mailing Personal Earnings and Benefit Estimate Statements (PEBES) so Americans know the retirement benefits they can expect.
- A Reliable Pension System *Pension Security* People deserve a pension system that they can rely on -- so President Clinton signed the Retirement Protection Act in December 1994. Now, workers and retirees will be able to count on receiving the pensions they have earned.
- Enhanced IRAs The President's Middle Class Bill of Rights allows people to set up an Individual Retirement Account and withdraw it tax-free for the cost of education... or first time home buying... or the care of a parent... or health care.

THE CLINTON ADMINISTRATION CONTINUES TO FIGHT FOR REAL HEALTH CARE REFORM *We remain firmly committed to guaranteeing health security to all Americans and to containing health care costs for families, businesses and federal, state and local governments.*

- First Steps As the President has consistently stated, this year we can take the first steps. The Congress can, and should, reform the insurance market; make coverage affordable for working families; help workers who lose their jobs keep their health insurance; continue the start made already to level the playing field for the self-employed; and **help families provide long-term care** for a sick parent or a disabled child.
- Long Term Care We know that long-term care is of critical importance to the elderly. That's why we have consistently supported expanding state administered home care services. It's also why we support tax clarifications for private long-term care insurance and consumer standards for long-term care so that insurance policies are worth more than the paper they're written on.
- Fighting Republican Cuts We're fighting to protect health care for mothers, children, the disabled and aged Americans. Republicans want to cut Medicare by about \$250 billion and federal Medicaid spending by about \$160 billion between now and 2002. These cuts will mean shifting a staggering financial burden to elderly and disabled Medicare beneficiaries; dropping coverage or shrinking benefits for the elderly, disabled, or mothers and children on Medicaid; and significant cuts in payments to hospitals, physicians and other providers.
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1993 Family & Medical Leave allows employees to take time
 4/26/95b to care for children or elderly relatives - 1st Leg signed
 by POTUS.

Pres Clinton & ~~Seniors~~
Prose -

The Admin's Record
on Issues of Imp to
Seniors

T of C
EC Security
HC / Rsrch
Crime
Housing



DEPARTMENT OF HEALTH & HUMAN SERVICES

Office of the Secretary
Administration on Aging

Washington, D.C. 20201

MEMORANDUM

TO: Carol Rasco

cc: Harold Ickes
George Stephanopoulos

FROM: Robert B. Blancato, Executive Director *BB*
White House Conference on Aging

Fernando M. Torres-Gil *FB*
Assistant Secretary for Aging

SUBJECT: The President's Remarks at the
1995 White House Conference on Aging

BACKGROUND

The 1995 White House Conference on Aging is the last of this century, and the first to be convened by a Democratic President. With approximately 2300 delegates from across the nation, this Conference will be the most cost-effective, focused, and results oriented forum since the first official White House Conference on Aging in 1961.

President Clinton's remarks to the delegates at the opening plenary session on May 3, 1995, can be likened to a State of the Union address on aging issues. The Conference can be used as the President's defining moment on the concerns and priorities of older Americans, and as such, his speech should have an air of urgency, opportunity, excitement and hope.

There are two principles that have served as the foundation of this Conference, and guided the overall tone and message of the hundreds of preliminary activities that were held across the nation in the past 18 months: (1) older Americans are not a monolithic bloc--a great deal of diversity exists among this population, and those differences should be recognized and celebrated; and, (2) the importance of intergenerational linkages--the natural bridge between the old and young. These twin pillars reflect provisions mandated by the legislation that authorized the White House Conference on Aging--the Older Americans Act Amendments of 1992. --specifically addressed + particularly intergen'l

This memo outlines several messages we feel it is important for the President to convey to the assembled Conference delegates.

The President will be offering a charge to the delegates, establishing the tone that will frame the discussions over the next several days---reminding the Conference participants of the essential nature of the task before them. We suggest that in the President's challenge to the delegates, he should clearly assert his commitment to the issues that impact on older Americans, including a strong declaration of support for the Medicare and Social Security programs. ~~While seniors make their views known on a host of social and fiscal issues, the future of Medicare and the solvency of Social Security are the predominant concerns.~~

A focus on intergenerational linkages provides a fresh approach to the discussion of Medicare and Social Security. Rather than merely highlighting these programs as important to today's seniors, an effective argument can be made for the importance of these services for future generations of retirees as well. If the debate is recast in those terms, the polarizing effect that often surrounds these issues can be effectively neutralized.

SPECIFIC ELEMENTS

1. History of White House Conferences

Historically, White House Conferences have been an important tool to demonstrate an Administration's commitment and resolve on a host of topics, including children and families, and the special concerns of the small business community. These forums, with the imprimatur of the President, have served to highlight specific priorities, and advance the Administration's views.

(While President Truman held the first national forum on aging, each of the succeeding formal White House Conferences on Aging (1961, 1971, and 1981) were convened by Republican Administrations.) This year's forum is the first to be assembled under a Democratic President. Each of the earlier conferences had a significant impact on public policy, including initial conceptualizations of the Medicare program and the Older Americans Act.

7 The 1995 White House Conference on Aging can also influence public debate---not only in terms of the needs of today's seniors, but also as a means for shaping aging policy for the 21st century, as the nation prepares for a doubling of the aging population.

2. How does this White House Conference on Aging differ from previous national forums?

The 1995 White House Conference is not merely an opportunity for seniors to travel to Washington and voice their demands, rather, this forum is goal directed and results oriented--with a

challenge to the delegates to not only identify problems and concerns, but also to seek methods to effectively address those issues, with particular emphasis on individual, local, and State responsibility, as well as what role, if any, the Federal Government can perform. While previous Conferences have focused on the Federal obligation to this population, the 1995 Conference has a focus on personal responsibility.

This Conference has been preceded by approximately 800 local, State, and regional events, with a focus on which issues and solutions should be brought to the national arena. Older Americans themselves have also participated in pre-Conference reports, and the formulation of the Conference agenda through the open comment-period following the publication of the proposed agenda in the Federal Register. This grassroots approach is another clear departure from Conferences of the past, and has resulted in the involvement of literally tens of thousands of seniors across the country.

how did it
work in
past?

Yet another distinction of the 1995 event is the series of post-Conference activities that will take place in the months following the national forum. Sessions will be held at the State and local level to focus on practical responses to, and a plan of implementation for, the issues raised at the Conference. Further, the final report of the Conference, which will be issued in December of this year, will not merely reflect matters raised at the Conference, but also the solutions advanced to address those concerns, as well as strategies to realize those solutions.

3. Who are the Elderly?

An important thread to weave throughout the President's remarks is the reminder that older Americans in this country are our parents, grandparents, teachers, and mentors---the people we love, respect, and admire. Older persons are not shrouded in a cloak of mystery, nor are their concerns so far removed from those of any citizen. These are individuals who have built this nation, defended the principles upon which this country was founded, nurtured children and grandchildren, and continue to give of themselves in a host of volunteer activities, including the National Service Corps. Further, no matter the race or gender, religious or political affiliation, each one of us will grow older, and that fact provides a universal bond and frame of reference.

4. Recognizing the Diversity of the Older Population while Responding to Common Concerns

It is important to keep in mind that while older persons are clearly an important political force, they are not a homogenous group. Differences based on gender, socio-economic status, minority and ethnic allegiance, family lifestyles, and geographic

dispersion, make Older Americans an increasingly diverse population. By the year 2030, there will be a doubling of the minority aging population, including an increase of 500 percent within the Hispanic aging community, and a 600 percent increase among Asian elders.

Despite this diversity, seniors respond as a political bloc on several key issues: preserving Social Security benefits; protecting and expanding Medicare coverage; promoting increased long term care services; stemming the rising tide of crime against the elderly; preserving social services such as nutrition programs; and planning for and safeguarding their families.

5. An Appeal to the Baby Boom Generation

As the country's first baby boom generation Chief Executive, the President has a natural forum to speak from that perspective. One-third of the nation's population are baby boomers, and the first wave of this group will be 65 by the year 2010. These individuals comprise a cohort of informed, well-educated, and politically active citizens, many of whom will continue to stay employed well past the traditional retirement years, and who will be influential in reshaping perceptions of aging. It is not too early for this group to begin to plan for their later years, whether they are still going strong at 70, or decide to retire at 55.

This generation is searching for reassurances that they will be able to count on Medicare and Social Security when it is time for them to seek assistance from those federal programs.

6. Celebrating the World War II Generation

The White House Conference on Aging provides a wonderful opportunity to pay tribute to the sacrifices of older veterans, particularly those who served in World War II. These Americans were the greatest achievers in the history of our country, whose successes range from eliminating dictatorships in Europe, ending legal segregation in America, and sending man to the moon. This generation created a wave of prosperity unprecedented in human history. Through the efforts of this cohort, a host of technological discoveries were advanced, and the World War II generation has lived to reap the benefits of those achievements.

These citizens represent the values of patriotism, community, selflessness, and self-reliance---values the Clinton Administration has sought to embrace once again---as well as a belief in government. References to the 50th Anniversary of the end of World War II will resonate well with the Conference delegates. ✓

7. The Clinton Administration's Accomplishments for Older Americans

The President also has a unique opportunity to highlight his accomplishments on behalf of older Americans, including:

- o Establishment of an independent Social Security Administration;
- o Unwavering support for Social Security and Medicare;
- o Championing the importance of long-term care, as evidenced by the long-term care provisions in the Health Security Act;
- o Commitment to increases in research dollars for Alzheimer's Disease;
PHS & NIH: requests for ↑
- o Support for the involvement of seniors in Americorps;
- o Elevation of the Commissioner on Aging position to Assistant Secretary status.

*\$20M in
Older Am Act programs
sp'ly for LTC,
HCE programs*

8. A Call for Compassion

Sorely lacking in the approach of the new Congress and their Contract With America, is a sense of compassion and understanding of individuals who will be impacted by changes in federal services. The most vulnerable persons (women, children and the elderly) in our society, of all ages, will be forced to cope with the consequences of the mean-spirited, slash and burn tactics of the Majority Party.

The legacy of the Democratic Party stands in direct contrast to the philosophy being advanced on the Hill. The fundamental principle of a Federal Government that **works for the greater good** of its citizens, runs counter to the notion of a Federal Government that **knows what is best** for its citizens. The President has consistently demonstrated a more empathetic approach.

9. The Success of Federal Programs for Older Americans

1995 marks significant milestones for federal programs providing services to the elderly, including the 60th anniversary of Social Security, as well as the 30th anniversaries of both Medicare and Older Americans Act programs. The triumph of these federal approaches reinforces the notion of a proactive government working for the greater good. The mission of the Older Americans Act, in particular, promotes health and independence for seniors, which parallels the goals of the Administration.

Ironically, many seniors are not always aware that these essential programs are a part of the federal government. As one example, the nutrition programs of the Older Americans Act ("Meals on Wheels" and congregate nutrition sites) are so embedded in the fabric of many local and State communities, that the beneficiaries of these services are often surprised to learn of the federal underpinning for these programs.

10. The President's vision for the 21st Century--Hope for the Future/Call to Arms

This Conference can be viewed as the first citizen's referendum on Aging issues---indeed, in some measure a citizen's referendum on the Contract With America---with the potential to direct the future of aging services for the balance of the 20th century, and the opportunity to provide the vision for such services for the 21st century. The resolutions that will emerge will be a result of deliberations from pre-Conference events, and final determinations by the delegates themselves. Older Americans feel a personal responsibility to leave a legacy of hope for their children and grandchildren, and that sense of obligation will be reflected in the outcomes of the Conference.

Seniors in this country are anxious to share the benefit of their years of experience with younger generations. There is much we can learn from the accomplishments of our nation's elderly, and their achievements should be honored and celebrated. This is the generation that turned back the threat of fascism and communism, and whose patriotic fervor bolstered the nation during complex and demanding times.

The 21st century will usher in new perspectives on aging, fresh opportunities for older Americans to share their expertise and wisdom, and innovative approaches to the role of government. The White House Conference on Aging can be a conduit to advance these goals.

CONCLUSION

It is our hope that the elements outlined in this memo will be helpful as the President's remarks to the Conference delegates are shaped. We stand ready to provide any additional assistance as is warranted, and are prepared to work with the President's speechwriters if that would be helpful.



DEPARTMENT OF HEALTH & HUMAN SERVICES

Office of the Secretary
Administration on Aging***Fax Transmission***

Washington, D.C. 20201

Date: 4-14To: MOLLY

Fax Number: _____

FROM:

Department of Health and Human Services
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 Anna Kindermann
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☒ Moya Benoit Thompson

Comments: This is not the "talking
points", but it is =
a memo circulated earlier
over at OEOB (Jeremy has a copy)
- we are still working on talking pts
+ will get stuff over to you soon
Number of Pages (including cover sheet): _____

OUTREACH STRATEGIES FOR OLDER AMERICANS

prepared by

**Fernando M. Torres-Gil
Assistant Secretary for Aging**

U. S. Department of Health and Human Services

OUTREACH STRATEGIES FOR OLDER AMERICANS

BACKGROUND

Elderly voters were a linchpin in the President's election victory. 1992 election data reveals that 50% of seniors voted for the President, compared to 38% for Bush, and 12% for Perot. This pattern is a dramatic reversal from the trend of the preceding twelve years, which saw older Americans supporting in overwhelming numbers the Republican candidate for President. Elderly voters contributed to the Reagan victories in 1980 and 1984, and the Bush triumph in 1988.

There has been a tremendous reservoir of good will among older Americans toward the President, which has been demonstrated not only in the voting booth, but also in this group's acceptance of the concept of sacrifice for the greater good, and their initial willingness to support the Administration's policies.

It should be noted that while older persons are clearly an important political force, they are not a homogenous group, and should not necessarily be viewed in monolithic terms. Differences based on gender, socio-economic status, minority and ethnic allegiance, family lifestyles, and geographic dispersion, make older Americans an increasingly diverse population.

Further, among the various cohorts of older persons, subtle difference are also apparent. Despite this diversity, seniors do respond as a political bloc on several key issues: preserving Social Security benefits; protecting and expanding Medicare coverage; promoting increased long term care services; stemming the rising tide of crime against the elderly; and preserving social services such as nutrition programs.

Data from last fall's mid-term elections indicate that support for the Republican agenda slightly increased on the part of elderly voters. Among voters ages 50-59, 52% supported Republican candidates in 1994. For voters 60 and over, the distribution was evenly split at the 50% mark. The gender breakdown for these same age groups also yields interesting results. For men ages 50-59, 54% followed the Republican banner, compared to 44% of women of the same age. For seniors 60 and over, 47% of women supported Republican candidates, while 51% of men in this age group championed the Republican position.

While this voting pattern cannot be heralded as a mandate by any means, it may indicate that senior voters harbored some doubt about the degree of concern this Administration has for the elderly.

The Republicans in Congress, armed with their "Contract With America", not only co-opted what had long been the chorus and conviction of Democrats when it came to senior issues, they also seized upon proposals favored among the more affluent and educated elderly (e.g. Social Security tax proposals, the earnings limitation test, senior only housing, etc.). Older voters observed as the Administration visibly embraced programs that impacted on younger generations, yet believed insufficient attention had been given to the concerns of older Americans.

The debates surrounding the role of Medicare in health care reform created confusion among older voters about which political party was the true champion of this vital program. The State of the Union address, which left no doubt about this Administration's unequivocal support for Social Security and Medicare, was an important step in reestablishing support for the President.

Clearly, much more needs to be done to insure that over the next 20 months the Administration solidifies the support of older voters. Over-arching, proactive, and clearly defined strategies are necessary to cement the backing of this key constituency. As we move toward that strategic plan of action, several assumptions should be noted.

ASSUMPTIONS

1. Older Americans sincerely desire change.

The elderly in this country were quick to embrace the Clinton/Gore theme of "change". We assume that seniors will support change, not for its sake alone, but to the extent that they and the generations that follow, will have a better quality of life. For this population, the concept of change recalls the 1930's, '40's and '50's, when investments for the public good, and sacrifice for the short term, led to a prosperous economy.

2. Older persons want to leave a legacy---a tangible contribution for the good of society.

Americans over age 65 can vividly recall the patriotic spirit that engulfed this nation fifty years ago---the desire to ensure a stable, more affluent, and safe society for their families. This is the generation that turned back the threat of fascism and communism, a remarkable legacy that continues to inspire all Americans. It should be noted that among veterans in this country, 16 million are between the ages of 50 and 85.

3. Older Americans are productive resources.

Seniors who have participated in White House Conference on Aging focus groups have expressed dismay that they are often perceived as a "burden" by the media. Millions of older Americans remain in the workplace, and millions more provide valuable community service as senior volunteers. Administration initiatives which both acknowledge these truths, and offer policies that can expand these kinds of opportunities, will be well received within the senior community.

4. The importance of aging advocacy organizations should not be underestimated or overlooked.

Aging organizations are an essential partner in our effort to reclaim older Americans. They represent a diverse set of opinions, and in some instances disagree among themselves. These organizations are a manifestation of the aging population in general, reflecting the range of disparate opinions inherent in those aged 65 and over.

It is imperative that aging groups be consulted on policy issues that impact on the population they serve. These organizations can serve as a political barometer, determining the degree of support for, or opposition to, specific policy initiatives and proposals. The key to this partnership, however, is to embrace the spectrum of aging groups, from the American Association of Retired Persons (AARP) and the National Council of Senior Citizens (NCSC), to the Asociacion Nacional Pro Personas Mayores and Families USA.

5. The President's focus on the importance of the middle class will resonate well with older Americans.

Despite the very real diversity among the elderly, a great many seniors define themselves as members of the middle class. The President's theme of economic security for middle class Americans reflects a fundamental concern elderly voters share. Seniors, in general, are committed to balancing the federal budget, but understand intuitively, and from historical experience, that such an undertaking must be done thoughtfully. Overall, older Americans would favor the President's approach.

Most seniors are fearful of the rising incidence of crime against older persons, worry about the economic security of their children and grandchildren, and harbor tremendous anxiety about becoming a burden to their families. They want to remain independent and productive members of society---a desire shared by most Americans regardless of age.

6. Older Americans care deeply about younger generations.

The "greedy geezer" stereotype, so often portrayed by the media, is an unfair characterization that negates the enormous concern most seniors have for younger generations. We must begin to promote the concept of sacrifice in a family context, i.e., how the difficult choices the government may ask of us today can impact positively on our children and grandchildren. Older Americans embrace this type of approach wholeheartedly.

STRATEGIES

With these assumptions in mind, we can begin to form solid strategies (both interim and long term), to reach out to seniors and highlight their concerns, thereby demonstrating the President's unwavering support for approaches to solve these problems.

• THE NEW COVENANT

The President's "New Covenant" theme offers a strong contrast to the "Contract With America". Not only does "covenant" symbolize a much deeper commitment than "contract", it holds historical resonance that embraces a host of religious traditions and cultural beliefs. For older Americans, the "New Covenant" theme brings to mind echoes of the Roosevelt Administration---a time when the President was able to instill a sense of patriotic fervor in the nation's citizens, as well as a belief that the Federal Government was working to improve the quality of life for all Americans.

As President Clinton offers his "New Covenant", the anniversaries of several successful programs for the elderly are upon us. 1995 marks the 60th anniversary of the enactment of Social Security, as well as the 30th anniversaries of Medicare, Medicaid, and the Older Americans Act. The triumph of these federal approaches reinforces the notion of a proactive government, and provides the President with a unique opportunity to outline his vision for the future relative to these programs, and the continuing role of government in shaping aging policy.

Further, the President's support for Medicare and Social Security, in particular, defines the differences between this Administration's commitment to those programs and those who would seek to destroy them. The President's resolve on this issue is the link between prior Democratic Administrations and the Clinton "New Covenant".

The President's strategic involvement in activities surrounding these commemorations offers a platform to remind all Americans of the legacy of the Democratic party, and to rededicate this Administration to the underlying principles of government that works for the good.

• **HHS AS A FOCAL POINT FOR LONG TERM CARE AND SENIOR ISSUES**

This Department brings to the table programs developed to improve the quality of life for the elderly, with not only Social Security and Medicare, but the programs of the Older Americans Act, and Medicaid for low-income seniors. It is only fitting that HHS seize this opportunity to claim its leadership role.

While older Americans applauded the President and Mrs. Clinton's resolve in tackling the health reform dilemma, seniors continue to insist that any reform package should include provisions for long term care services. Long-term care ranks as the single most important health item for the elderly.

The Department of Health and Human Services has a tremendous leadership role to play in this arena. A unique opportunity exists to have the operating divisions within this Department join forces in addressing the importance of long-term care from a variety of perspectives.

The Administration on Aging brings to this equation several distinctive elements, including a strong background in home and community-based long-term care concerns specifically, as well as an infrastructure of State Units on Aging, local Area Agencies on Aging, and community service providers that have been experimenting with the community-based long-term care service model for more than twenty-five years.

HCFA's Medicare program, and in particular its Medicaid waivers for the disabled elderly, are the fiscal center of long term care. PHS, with its biomedical research on Alzheimer's disease and arthritis, as well as its examination of social and behavioral factors, offers hope to the frail and disabled elderly. ACF can also play a role through its social services block grant and intergenerational focus.

It is imperative that the Assistant Secretary for Aging join with his counterparts from HCFA, PHS, and SSA (before and after the separation) in a united front to promote long-term care issues. More opportunities for these OPDIV heads to appear together to promote the Department's efforts in serving older persons should be created. For example, AOA is planning a Media Roundtable event at the National Press Club, that would bring together Bruce

Vladeck, Shirley Chater, and Fernando Torres-Gil during Older Americans Month in May 1995.

The Secretary's visibility in speaking out on these issues should also be heightened. Perhaps an internal working group could be formally established. If such an internal effort is successful, the President could garner considerable political mileage for his vision in encouraging our Department's work---once again fortifying his dedication to the special needs of older Americans.

• THE WHITE HOUSE CONFERENCE ON AGING

During the first week of May, the last White House Conference on Aging in this century, and the first to be called by a Democratic President, will convene. This forum offers one of the most visible opportunities for the President to demonstrate his commitment to aging concerns. The most recent White House Conference on Aging, held in 1981, was a fractious and highly charged affair. While former President Bush did call for a Conference to be held in 1993, it was never convened.

We have worked diligently to ensure that the 1995 forum is not a simply a repeat of past Conferences. Far from being merely an opportunity for seniors across the country to travel to Washington and voice their demands, the 1995 White House Conference on Aging is goal directed and results oriented, with a challenge to the delegates to not only identify problems and concerns, but also to seek methods to effectively address those issues, with particular emphasis on individual, local, and State responsibility, as well as what role, if any, the Federal Government can perform. The Secretary's direct involvement and participation in White House Conference activities will also serve to highlight the Department's outreach to seniors.

As we approach the May Conference, approximately 700 local, State, and Regional events have been held, with a focus on what issues and solutions should be brought to the national arena. Seniors have also participated in the formulation of the Conference agenda through the open comment period following the publication of the proposed agenda in the Federal Register. This grassroots approach is another clear departure from Conferences of the past, and has resulted in the involvement of literally tens of thousands of seniors across the country.

For the President, the White House Conference on Aging is a natural platform to emphasize his attention to, and concern for, senior issues. The President is tentatively committed to speak at the opening plenary session, and possibly a focus group session prior to the larger forum.

The final report of the Conference, due at the end of 1995, could be accompanied by a strong Presidential message on aging policy; dovetailing appropriately with the increased activity of the campaign season. The release of the report could also be followed by grass roots events aimed at implementing resolutions that flow from the Conference. This type of thrust can build momentum to bolster and maintain senior support for the President.

• **THE FEDERAL COUNCIL ON AGING**

An important, yet infrequently tapped, resource for this Department and the President is the Federal Council on Aging (FCoA). The Council is comprised of 15 members, appointed by the President and Members of Congress. The President also selects the Council Chair. The Older Americans Act mandates that members of this group must have expertise and experience in the field of aging, and must reflect, geographic diversity, national organizations with an aging focus, the business community, Indian tribes other ethnic groups, and the general public.

Since its inception in 1973, the Federal Council has had an uneven history. Perhaps its most activist period came during the Carter Administration, under the leadership of Council Chair Nelson Cruikshank, who also served as a Counselor to the President on senior issues.

Uniquely positioned to provide advocacy within the aging community and the Congress, members of the FCoA are, in essence, the nation's ambassadors on aging issues, and emissaries of the President. Their dedication to the concerns of seniors, willingness to speak out on those topics, and ability to influence public policy within their local communities, make the members of the Council a potentially powerful tool for this Administration. Promoting the visibility and prominence of the FCoA is another method for this Administration to signal its commitment to older Americans.

• **ACTIVITIES WITHIN OTHER CABINET AGENCIES**

There is a vital role to play on the part of other cabinet level and independent agencies (e.g. DOL, Corporation for National Service, and VA). As an example, both the Department of Labor and the Social Security Administration are developing public education campaigns designed to engage the baby boom generation. DOL has a savings focus for its effort, while SSA is committed to restoring the public's confidence in the integrity of the Social Security Trust Fund. Both of these endeavors complement the

Administration on Aging's outreach proposal, which focuses on the need for baby boomers to anticipate their retirement years differently, realizing that historical definitions and expectations of retirement need not apply.

• THE PRESIDENT'S ROLE

The lack of a single, formal unit within the White House to develop and monitor outreach efforts specifically toward the elderly sends a message, however unintended, that this key population group is not considered as great a priority as other constituencies. Although various White House staff (e.g. Office of Public Liaison and the Domestic Policy Council) have worked hard on senior issues, and are well respected among senior advocates, there is no single focal point.

One bold stroke that would capture the attention of seniors would be the appointment of a "Counselor" to the President on aging issues. President Carter effectively used Nelson Cruikshank in this position. The ideal candidate for such a post would be an elder statesperson, with experience in the aging field. At the very least there should be an individual office within the White House charged with senior concerns. Such a high profile post would continue to reinforce this Administration's deep commitment to older Americans.

Selected television, public service announcements and/or radio addresses on specific issues that impact the elderly, and site visits to senior centers, nursing homes, assisted living facilities, and retirement communities, are examples of outreach activities that would have a significant positive impact on the perceptions of older Americans.

The First Lady's continued involvement with women's health issues, particularly her present focus on breast cancer, the importance of mammography screening, and the Medicare co-payment, has sent a very positive message among the senior community, especially older women. Mrs. Clinton has integrated her speeches and public forums with visits to senior centers, nutrition sites, and other health facilities, which serves to put a human face on the issues being discussed. The Administration on Aging is also working with the First Lady's staff to cement her involvement in White House Conference on Aging events.

Another platform for the President is Older Americans Month, which is commemorated in May of each year. With the White House Conference convening at the beginning of that month, and a series of activities designed to promote and celebrate the special

concerns and interests of the elderly throughout May, a number of forums or speaking engagements could be generated during Older Americans Month to continue the Administration's demonstration of support for seniors.

CONCLUSION

These suggested strategies merely represent a few options for consideration as we reflect on the potentially devastating consequences of losing the elderly vote. We must remain focused on the larger issue of reassuring older Americans that their concerns merit as much attention as any other population group. The elderly exemplify an essential base of support that should be nurtured. Seniors offer a loyal and politically sophisticated voting bloc, if they believe this Administration has treated them fairly, and programs and services for the elderly are not compromised.



DEPARTMENT OF HEALTH & HUMAN SERVICES

Office of the Secretary
Administration on Aging***Fax Transmission***

Washington, D.C. 20201

Date: 4-14To: MOLLY

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FROM:

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Office of the Assistant Secretary for Aging****Phone: (202) 401-4634 or (202) 401-4541****FAX: (202)401-7741** **Fernando M. Torres-Gil, Assistant Secretary for Aging**
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 X Moya Benoit ThompsonComments: This is ALSO not
our talking points
but an "unofficial" list - more
to come.**Number of Pages (including cover sheet):** _____

ACCOMPLISHMENTS OF THE CLINTON ADMINISTRATION for the elderly

ADMINISTRATION ON AGING AND GENERAL

The Administration on Aging continues to administer the programs mandated by the Older Americans Act, which for 30 years have provided critical daily social and human services to older Americans and their families.

The signing of the Family and Medical Leave Act in 1993, which allows employees to take time to care for their children and/or elderly relatives. First legislation signed by the President upon taking office.

The elevation of the position of Commissioner of Aging to the Assistant Secretary for Aging. This elevation by the President and the Secretary enables the Assistant Secretary, who is mandated by law to be the chief advocate for the elderly within the Federal government, to be a principle part of key decisions within the Department of Health and Human Services that affect older Americans and their families.

The inclusion of long term care and prescription drug coverage in the President's Health Security Act as well as the advocacy on its behalf.

The calling of a White House Conference on Aging for 1995, the first White House Conference on Aging since 1981. When the President announced this Conference on February 17, 1994, he declared that this last conference of the 20th century be a "grass roots" conference, with input from people all across America. Since that time, almost 700 pre-conference events have occurred, involving approximately 57,000 individuals have participated, over 70% of those individuals over the age of 55. It is expected that the resolutions from this Conference will be developed into aging policy for the next ten years.

The expedient delivery of disaster relief assistance to elderly victims of the Midwest Floods and the Los Angeles earthquake, and other disasters and continued follow up through the local area agencies on aging. In addition, visits to both areas damaged by the disasters to ensure coordination of services.

The signing of the Older Americans Month proclamations for 1993 and 1994 reaffirming the Administration's commitment to senior citizens and the contributions they make to our Nation. The execution of various national, state and local celebratory events led by the Administration on Aging to mark the month and the importance of seniors throughout the year.

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The establishment of various strategic initiatives within the Administration on Aging which target four areas relating to the elderly which need to be addressed -- the retirement of the baby boomers at the turn of the century; the special needs of older women; long term care and home and community-based care, and nutrition and malnutrition.

The Administration on Aging's focus on crime and violence prevention among the elderly, through Title VII of the Older Americans Act, "Vulnerable Elder Rights Protection"; through interagency agreements and collaborative efforts with the Administration for Children and Families (domestic violence) as well as the Department of Justice.

The Administration on Aging is demonstrating the cross cutting nature of its focus and programs by entering into several interagency agreements within the Department of Health and Human Services and throughout the Federal government. Each agreement has as its goal to produce a report or a product that will improve the quality of life for our Nation's older Americans. Among those entities who are partners with the Administration on Aging are the Department of Housing and Urban Development, Labor, Transportation, Commerce, and others.

The Administration on Aging is also involved in the promotion of partnerships with other nations who have an interest in the field of aging, and the Assistant Secretary for Aging is a member of the US Japan Commission on Aging.

The Administration on Aging, as part of its older women's initiative, has been assisting the Department and the Office of Public Liaison at the White House and the Office of the First Lady in the First Lady's efforts to promote the use of mammography screening by older women as a detection and prevention mechanism against breast cancer.

SOCIAL SECURITY

✓ The President signed legislation making the Social Security Administration an independent agency, an action which has as its major goal to rebuild public confidence in the Social Security program, to make its services more effective and consumer friendly. The separation of SSA from the Department of Health and Human Services will occur in 1995, a year in which we also celebrate the 60th anniversary of the creation of Social Security.

✓ SSA has initiated advanced communication with senior citizens by launching the new Personal Earnings and Benefit Estimate Statement (PEBES), targeted at those people 60 years of age and over. These statements contain an individual's personal earnings records, and clearly show the amounts the recipients will receive in Social Security retirement benefits, or should the need arise,

disability or survivors benefits. About 9 million PEBES statements will be mailed this year to non-beneficiaries age 60 or over. From 1996-1999, persons attaining age 60 will also receive one. PEBES statements will start going out automatically to an estimated 123 million younger workers (age 25 and over) in the year 2000.

SSA administers the SSI program for needy aged, blind and disabled people (Title XVI of the Social Security Act). SSI provides a federally financed floor of income for eligible individuals with limited incomes and resources. As of September 1994, 6.3 million people received SSI payments or federally administered State supplementary payments. About 2.1 million were aged 65 and older. These payments totaled approximately \$27.7 billion in 1994.

HCFA (Health Care Financing Administration)

The Medicare and Medicaid programs, administered by HCFA, provide access to health care for close to 70 million people, or one in four Americans. Both these programs will celebrate their 30th anniversaries in 1995.

Since 1993 HCFA has made significant improvements in Medicare and Medicaid by 1) strengthening managed care, 2) combating fraud and abuse, 3) simplifying program administration, 4) enhancing quality, 5) enhancing coordination and integration of health care, 6) improving access to affordable and quality health care, 7) improving beneficiary services, and 8) empowering States.

In November 1994, HCFA issued a regulation providing a wider range of penalties to enforce nursing home quality. The implementation of this regulation completes the enactment of the major provisions encompassed in OBRA 87 aimed at improving nursing home residents' rights and quality of life.

To better coordinate and integrate its health care services, HCFA has undertaken many new initiatives to improve service utilization and beneficiary satisfaction. HCFA oversees the Program for All Inclusive Care for the Elderly (PACE), a demonstration program to provide and study integrated acute and long term care services for the frail elderly. In January 1994, nine sites were operational.

HCFA has established the Home Health Initiative to refine the Medicare and Medicaid programs to make them work better. The primary goal of the initiative is to make the Medicare home health benefit more responsive to beneficiary needs.

In the area of improving access to affordable and quality health care, HCFA has initiated a Consumer Information Strategy to help Medicare and Medicaid beneficiaries achieve better health through increased utilization of preventive services. This campaign promotes Medicare's new coverage of flu shots and mammography

screening. The strategy will address issues relating to breast and prostate cancer.

HCFA has developed a plan to better serve beneficiaries with special needs related to vision, hearing, mobility, literacy and language. This plan will assist these individuals to more easily gain information about Medicare and Medicaid programs and access to its services.

To further improve beneficiary understanding and to simplify the current Explanation of Your Medicare Part B Benefits (EOMB) notice, HCFA launched a partnership project, including Medicare contractors, advocacy groups, and other customers, to redesign not only the Part B EOMB, but also the outpatient EOMB and the Part A Medicare Benefits Notice.

ASPE (Planning and Evaluation)

ASPE is involved in a broad range of activities related to aging policies and programs. It manages grants and contracts which focus on the elderly and coordinates other activities which integrate aging concerns with those of other population groups. The following are major studies in which ASPE is involved.

EVALUATION OF THE ELDERLY NUTRITION PROGRAM

The Department of Health and Human Services (ASPE together with the Administration on Aging) is conducting an evaluation of the Elderly Nutrition Program through Mathematica Policy Research of Princeton, New Jersey. The evaluation, which is mandated by Congress will provide reliable estimates of the impact of the programs's nutritional components on the nutrition, health, functioning, and social well being of the participants. It will also describe how the program is administered, operated and funded, and the effectiveness of those components.

POST-ACUTE CARE FOR MEDICARE PATIENTS

The study being conducted by the University of Minnesota has as its primary objective to describe the "natural history" of care received by patients with five different impairments in three post acute care modalities. This study's findings may be used to construct a revised payment method for post acute care in the Medicare program.

A NATIONAL STUDY OF ASSISTED LIVING

Assisted living refers to residential settings that combine housing, personal assistance and other supportive service arrangements for persons with disabilities. The focus of this study being conducted by Research Triangle Institute is where assisted living fits in the long term care system and its potential for addressing the needs of the elderly and persons with disabilities. The study will examine the role of assisted

living from the perspective of consumers, owners, workers, regulators, developers and investors, and others who have a stake in the nation's long term care system.

ADMINISTRATION FOR CHILDREN AND FAMILIES

The Administration for Children and Families also has programs and initiatives that serve the elderly. In particular, the Low Income Home Energy Assistance Program (LIHEAP). Through LIHEAP, the federal government provides grants to states, territories, Indian tribes, and tribal organizations that wish to assist low income households in meeting the costs of home heating and cooling needs. Out of the 6.1 million households receiving heating assistance under this program, an estimated 2 million of those households contain at least one elderly person.

ACF has also entered into an interagency agreement with the Administration on Aging to conduct a three year study on the incidence of domestic violence among older women.

The Administration on Developmental Disabilities' University Affiliated Programs (UAP) Initiatives on Aging.

The University Affiliated Programs is a discretionary grant program for public and private, non-profit agencies affiliated with a university. The Administration for Developmental Disabilities awards grants to UAP's for the development of interdisciplinary training programs to prepare professional staff to provide services to older persons with developmental disabilities. Grants for 1992, 1993 and 1994 totalled approximately 3 million dollars.