



## Cal-EESI Messaging Chart

February 5, 2008

<b>TOPLINE MESSAGES</b>	<b>ASSERTIONS</b> (Submessages that support each component of each topline message)	<b>SUPPORTS &amp; SPECIFICS</b> (Statements & data that support each assertion)
<p><b>Message #1: What is the California Elder Economic Security Initiative?</b></p> <p>Led by the Insight Center for Community Economic Development, Cal-EESI is a statewide, research-driven initiative at the forefront of a national effort to raise awareness and promote policy change to ensure that older Californians* can live with dignity and economic well-being in their own homes.</p> <p><i>*Note that the use of elders/older Californians may change based on audiences.</i></p>	<p>Cal-EESI is a research-driven initiative directed by a diverse statewide coalition that provides education, advocacy and outreach to policymakers, advocates, foundations and direct service providers.</p>	<p>Key components of "education:"</p> <ul style="list-style-type: none"> <li>• Informing decision-makers, advocates, direct service providers and the community-at-large about the true cost of living for older adults</li> <li>• Advising decision-makers, advocates, direct service providers, foundations and the community-at-large on how to use this new information to help elders meet the economic challenge of living on a fixed income in the face of ever-rising costs.</li> <li>• Informing elders about the reasons behind their current financial struggle (not their fault), their eligibility for government and private supports and advocacy opportunities</li> </ul> <p>Key components of "advocacy:"</p> <ul style="list-style-type: none"> <li>• Inserting the Elder Economic Security Standard™ Index (Elder Standard) into the existing debate around senior issues/programs</li> <li>• Direct advocacy through contact with legislators, legislative analysts, and executive branches (e.g. Governor's Office, White House aides, and Mayor's Offices)</li> <li>• Equipping the existing community of aging issues advocates and inspiring others to advocate for elder financial security</li> <li>• Equipping planners with new tools to adequately address infrastructure needs for the rapidly growing population of California's seniors (e.g. housing, food, health, and transportation)</li> <li>• (Phase II) Directing attention to the elder population most in need in California by quantifying the number of seniors who are struggling to</li> </ul>

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		<p>make ends meet.</p> <p>Key components of desired policy change (results of “advocacy and outreach to policymakers”)</p> <ul style="list-style-type: none"> <li>• Adoption of Elder Standard as a measure of the effectiveness of existing policy and the basis for future policy considerations</li> <li>• Current goal is to help protect against cuts (or at least cuts beyond the 10%)</li> <li>• Use of the Elder Standard in planning documents and future initiatives related to housing, transportation, health care, food, workforce development, and the preservation of Medicare and Social Security</li> <li>• Use of the Elder Standard in the Department of Aging and Area Agency on Aging strategic plans</li> <li>• Long-term: passage of new laws to increase affordable housing for seniors; bolster senior food and nutrition programs; close the gap in health care coverage for seniors and the 50-64 year old population; and promote livable communities for older adults to be able to age in place.</li> </ul> <p>Why the coalition (strengths of coalition)?</p> <ul style="list-style-type: none"> <li>• Elder population in California is projected to nearly double by 2020. To address this growing demographic, we need a broad-based coalition of organizations and experts that reaches across all sectors, and who are dedicated to ensuring the well-being of elders and their families in California.</li> <li>• Coalition is uniquely national, statewide and regionally-based, so that the new measure can be institutionalized at all levels of government and tailored to meet the specific needs of California’s diverse communities</li> <li>• Coalition includes leaders and experts who cover a wide range of aging issues and interact with the aging population in diverse ways (e.g. as service providers, policymakers, public agencies, advocates, researchers and grant makers)</li> </ul> <p><b><u>Supporting Collateral:</u></b></p> <ul style="list-style-type: none"> <li>- <b>New Advocacy One-Pager</b></li> </ul>

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		<ul style="list-style-type: none"> <li>- <b>New Policy One-Pager</b></li> <li>- <b>New Service Provider One-Pager</b></li> <li>- <b>Elder Standard Policy Brief – Pages 4&amp;5</b></li> <li>- <b>Coalition Members: (Steering Committee List)</b></li> <li>- <b>New EESI FAQ</b></li> <li>- <b>EESI Strategic Plan</b></li> <li>- <b>MA FAQ</b></li> <li>- <b>CA Elder Economic Security 2-pager (existing)</b></li> <li>- <b>Cal-EESI Possible 08 Leg Priorities document</b></li> <li>- <b>Cal-EESI Pre-Messaging Memo: Goals &amp; Objectives</b></li> </ul>
	<p>Cal-EESI puts into practice a new localized financial tool that represents a specific and realistic measure of the cost of meeting the basic needs of the elderly.</p>	<p>Reference data that measures the cost of living and defines “meeting basic needs to survive”:</p> <ul style="list-style-type: none"> <li>• The Elder Standard quantifies in an empirical way what those in the direct service field know anecdotally (e.g. that the federal poverty line grossly underestimates the true cost of living and many seniors fall through the cracks.</li> <li>• Elder Standard (County Specific Data)</li> <li>• The information developed through the Elder Standard helps us understand that many older adults who are not poor, as defined by the official federal poverty level, still do not have enough income to meet their basic needs.</li> <li>• The Elder Standard helps answer the following questions: How much income is needed by older adults to cover today’s ever-rising living costs? What is the impact of public programs, such as Medicare, Medicaid, or housing assistance on an elder’s evolving income needs and healthcare needs? Will it be necessary for able older adults to continue to work for pay, despite being of retirement age and preferring to retire? What happens when older adults can no longer work, but they do not have enough to meet their basic needs?</li> <li>• The Elder Standard is calibrated to household size, geographic area, and life circumstances. The development and use of state and county specific Elder Standards promotes a measure of income that respects the autonomy goals of older adults, rather than a measure of what we all struggle to avoid – abject poverty.</li> </ul>

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		<p>How different public supports can help close the gap (income supports):</p> <ul style="list-style-type: none"> <li>• Rental assistance such as Section 8 housing vouchers can close the gap between what elders can afford to pay for housing and the true and ever-rising costs of housing. But, this support is virtually unavailable in high-cost areas of the state.</li> <li>• Housing trust funds, housing bonds, and low-income housing tax credits would increase the supply of affordable housing to prevent increased homelessness among older populations.</li> <li>• Food Stamps, meals-on-wheels, brown-bag lunches and other home and community-based nutrition programs can prevent elders from going hungry and help prevent deterioration of health.</li> <li>• Supplemental Security Income (SSI), an income support program for low-income seniors, the blind and disabled populations, can help elders meet basic needs. However, benefit levels are just above the official poverty line and far below the Elder Standard. SSI benefit levels must increase and COLAs must be added annually.</li> <li>• More funding for home and community-based long term care through programs like In-Home Support Services (IHHS) would enable elders to remain in their homes longer and can save the government money</li> <li>• Using the Elder Standard to expand eligibility limits for public programs will enable more seniors to access needed supports; eliminating unrealistically low asset limits would make it possible for current low-income workers to save for retirement.</li> <li>• Closing gaps in Medicare coverage would enable seniors to decrease their out-of-pocket medical expenses and better access vital health care when they need it.</li> <li>• Supporting social security and worker savings opportunities such as defined benefit contributions and benefit plans can help prepare people for retirement and advance income security upon retirement.</li> </ul> <p><b><u>Supporting Collateral:</u></b></p> <ul style="list-style-type: none"> <li>- <b>WOW National Methodology</b></li> <li>- <b>Elder Standard Policy Brief – Page 2, 4</b></li> <li>- <b>MA FAQ</b></li> </ul>

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		<p align="center">- <b>MA Findings Powerpoint</b></p>
	<p>Cal-EESI will help bolster the existing senior services infrastructure in California and make government supports more efficient in the face of the existing and growing need for senior supports. The Elder Standard enables policymakers to evaluate which programs and policies are most effective in helping elders reach economic security---and in doing so, it helps decision makers direct limited funds to appropriate programs.</p>	<p>Number of Boomers:</p> <ul style="list-style-type: none"> <li>• There are 75 million baby boomers 42 to 60 years old; the oldest members of this generation will reach 65 in just five years.</li> <li>• According to the 2005 Retirement Confidence Survey conducted by the Employee Benefit Research Institute (EBRI), "By 2030, when all baby boomers have retired, retirees will have at least \$45 billion less in retirement income that they need to cover basic living and health care expenses."</li> <li>• "Boomers" will spend more time in retirement than any previous generation.</li> <li>• A significant increase in the number of elders will strain existing mechanisms of support</li> </ul> <p>We are Living Longer:</p> <ul style="list-style-type: none"> <li>• A 65 year old can now expect to live another 18 years, on average</li> <li>• American seniors are living 50 percent longer than they were in the 1930s, when Social Security set 65 as the benchmark retirement age.</li> <li>• The life expectancies for women average three years longer than men's, but according to a 2004 survey by the U.S. Census Bureau, the median salary for women is 24 percent less than that for men.</li> </ul> <p>Elders Already Living in Poverty:</p> <ul style="list-style-type: none"> <li>• Despite efforts to ensure decent standards-of-living for U.S. elders, U.S. Census data report 10% of those aged 65 or older lived below the federal poverty line (\$10,400 for singles) in 2005. The percentage doubles in many areas.</li> <li>• More than half (53%) of Americans aged 65 or older live below 200 percent of the federal poverty threshold (\$28,000)</li> <li>• Women are almost twice as likely to live in poverty in their senior years as men. The poverty rate for older women increases to 12.5%.</li> <li>• Poverty hits older women of color the hardest – 25 percent of African-American and 22 percent of Hispanic women live in poverty. For women living alone, the rates are even higher. For example, 45.9 percent of older Hispanic women who live alone also live in poverty.</li> </ul> <p><b><u>Supporting Collateral:</u></b></p>

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		<ul style="list-style-type: none"> <li>- <b>New Advocacy One-Pager</b></li> <li>- <b>New Policy One-Pager</b></li> <li>- <b>New Service One-Pager?</b></li> <li>- <b>Elder Standard Policy Brief – Pages 4&amp;5</b></li> <li>- <b>EESI Strategic Plan</b></li> <li>- <b>New EESI FAQ</b></li> <li>- <b>CA Elder Economic Security 2-pager (existing)</b></li> <li>- <b>Cal-EESI Possible 08 Leg Priorities document</b></li> </ul>
	<p>Cal-EESI is a long-term project that will inform the development of policies and programs to close the gap between income and expenses for seniors.</p>	<p>The gap is:</p> <ul style="list-style-type: none"> <li>• Too many retired elders, families with children and single people in our country struggle and often fail to make ends meet - losing the roof over their heads, going without needed medical attention and not eating enough food to remain healthy. People and communities can become economically secure when good data drives strong policy and quality policy implementation.</li> <li>• Reference Elder Standard data on gap between Federal Poverty Line, SSI and Social Security and the Elder Standard</li> <li>• See poverty information below</li> </ul> <p>What requires the long-term commitment to change??</p> <ul style="list-style-type: none"> <li>• It will be difficult to confront the existing problems and plan for the growth of our elderly population in the current, restricted budgetary environment. However, we must use the Elder Standard framework to catalyze policy debates about what is needed to close the gap in the long-term</li> </ul> <p>Examples of a long-term investment that pays off:</p> <ul style="list-style-type: none"> <li>• Regular low-cost dental care prevents people from developing more expensive dental problems</li> <li>• Supportive housing prevents seniors from moving to retirement homes that cost the federal and state government millions of dollars in Medicaid expenses (and elders <i>prefer</i> to live in their own homes)</li> <li>• Investments in low-cost nutritional food helps to deter health problems in later years</li> </ul>

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		<ul style="list-style-type: none"> <li>• Closing the gap in health care coverage enables seniors to receive the preventative care they need today, avoiding more expensive emergency care down the road</li> </ul> <p>California Elder Poverty:</p> <ul style="list-style-type: none"> <li>• 8% of CA adults aged 65+ lived below the federal poverty line in 2005</li> <li>• 10% of LA County adults aged 65+ lived below federal poverty in 2005</li> <li>• 29% of California’s older adults have incomes double the poverty line or lower (\$20,800 single adult; \$28,000 two-person household)</li> </ul> <p>Elder Expenses Exceed Their Income</p> <ul style="list-style-type: none"> <li>• It is impossible to make ends meet on the average annual Social Security payment, even though 3 out of 10 elders rely solely upon Social Security;</li> <li>• Housing is the greatest expense for elders. More and more low- and moderate-income elders are carrying housing debt later and later in life. Other housing issues include the high cost of rent and property taxes. In recent years, we have also seen a rise in housing foreclosures among the elderly who are often victim of predatory loan practices.</li> <li>• Health care is the second greatest expense. The patchwork of Medicare leaves elders with significant out-of-pocket expenses.</li> <li>• Long-term care expenses are significant and the current social insurance programs do not begin to ease the financial burden.</li> <li>• Income and asset eligibility levels for support services are far too low for elders to qualify.</li> </ul> <p><b><u>Supporting Collateral:</u></b></p> <ul style="list-style-type: none"> <li>- <b>MA Findings Powerpoint</b></li> <li>- <b>Elder Standard Policy Brief – Page 4&amp;5</b></li> <li>- <b>New Graphic Representation of the Elder Standard Data</b></li> <li>- <b>“Baby Boomers Concerned About Loss Of Benefits” – USA Today, Arizona Republic 1/23/08 by Sue Kirchhof</b></li> </ul>
	Insight Center for Community Economic Development’s EESI is a leading partner in a national	Statewide Movement Driven by Insight Center <ul style="list-style-type: none"> <li>• The Insight Center for Community Economic Development is a national</li> </ul>

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	<p>movement to improve the economic stability of elders.</p>	<p>research, consulting, and legal organization dedicated to building economic health in low-income communities. For nearly 40 years, the Insight Center has partnered with a diverse range of colleagues to develop, support and promote programs and public policies that help people and communities become, and remain, economically secure.</p> <p>The Insight Center works in collaboration with foundations, non-profits, educational institutions, government agencies, and business to develop, support and promote programs that:</p> <ul style="list-style-type: none"> <li>• Lead to good jobs—jobs that pay enough to support a family, offer benefits and provide the opportunity to advance</li> <li>• Strengthen early care and education systems so that children can thrive and parents can work or go to school</li> <li>• Enable people and communities to build financial and educational assets</li> </ul> <p>The concept of economic security unites all of our program work. We define economic security as not just being above the federal poverty line, but having enough money to build a more stable and prosperous future. To be truly economically secure, and leave poverty behind for good, people need enough money to be able to pay for the basics like rent, food, childcare, healthcare, transportation and taxes, <i>and</i> enough money to develop savings and assets.</p> <p>The Insight Center is one of the national leaders of the Family Economic Self-Sufficiency Project, an innovative, nationwide effort to gain support for strategies to help low-income families reach economic self-sufficiency. In California, this program is known as CFESS, or Californians for Family Economic Self-Sufficiency.</p> <p>Insight Center’s Leadership:</p> <ul style="list-style-type: none"> <li>• The Insight Center for Community Economic Development is a national research, consulting and legal organization dedicated to building economic health in vulnerable communities.</li> <li>• Insight’s mission is to develop and promote innovative solutions that help people and communities become, and remain, economically secure.</li> </ul>

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		<p>National Movement in Collaboration with WOW:</p> <ul style="list-style-type: none"> <li>Wider Opportunities for Women (WOW) works nationally and in its home community of Washington DC to achieve economic independence and equality of opportunity for women and girls at all stages of life. For over 40 years, WOW has been a leader in the areas of nontraditional employment, job training and education, literacy, welfare to work and workforce development policy. Since 1995, WOW has been devoted to the self-sufficiency of women and their families through the national Family Economic Self-Sufficiency project (FESS). Through FESS, WOW has helped to reframe the national debate on social policies and programs from one that focuses on poverty to one that focuses on what it takes families to make ends meet. Building on FESS, WOW has expanded to meet its intergenerational mission of economic independence for women at all stages of life with the Elder Economic Security Initiative.</li> </ul> <p>The Elder Economic Security Initiative and Elder Economic Security Standard were first introduced in Massachusetts in 2006.</p> <p>California will launch the rollout of its statewide EESI in 2008, with three other pilot states joining a national launch soon thereafter. The initiative will expand to 20 states within 5 years.</p> <p><b><u>Supporting Collateral:</u></b></p> <ul style="list-style-type: none"> <li><b>WOW National Methodology Brief</b></li> <li><b>WOW Insight Policy Brief</b></li> <li><b>MA Findings Powerpoint</b></li> <li><b>MA FAQ</b></li> </ul>
<p><b>Message #2 -- What benefits will this initiative provide key audiences and ultimately the elderly they serve?</b></p> <p>Cal-EESI will introduce a new, realistic measure of what it takes for seniors to make ends meet and remain their own homes.</p>	<p>Cal-EESI breaks out the major components of economic needs that can be customized by county and other demographics to realistically measure what it takes for seniors to make ends meet.</p>	<ul style="list-style-type: none"> <li>Policymakers and advocates can use the Standard to more effectively quantify the value of subsidies, clearly demonstrating where subsidies are most needed. The standard is customized to geography, housing, health care, food, and transportation.</li> <li>The Elder Standard quantifies the comfortable minimum.</li> <li>The Elder Standard is based on all of the costs older adults face on a daily basis – housing, food, health care, transportation as well as miscellaneous costs.</li> </ul>

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This new initiative will provide information that legislators, advocates, direct service providers and others need to make more informed decisions about retirement and the financial stability of older adults.		<p><b><u>Supporting Collateral:</u></b></p> <ul style="list-style-type: none"> <li>- <b>MA FAQ</b></li> <li>- <b>Elder Standard Policy Brief – Page 4</b></li> <li>- <b>Benefits Graph—which one?</b></li> </ul>
	Advocates will gain the tools they need to effectively make the case for and bring about policy change.	<p><b><u>EESI BENEFITS FOR ADVOCATES</u></b></p> <ul style="list-style-type: none"> <li>• EESI is a reliable, realistic index with which to communicate the impact of certain policies and convey community needs to decision makers.</li> <li>• The U.S. Census poverty data are merely the tip of the iceberg. These figures represent use of an inadequate and out-of-date Federal poverty line as their baseline measure, thus failing to fully document hardship in our nation. The federal poverty line does not account for the rising cost of living that seniors experience as they age. Nor does it capture how one change in elders’ life circumstances – an illness, loss of a spouse, or need to care for a disabled spouse, adult dependent child, or grandchildren – can push elders over the edge economically.</li> <li>• The federal poverty line is based on the outdated assumption that households spend one third of their income on food; it does not capture non-food related costs, and it is the same, whether one lives in Silicon Valley or Wichita, Kansas. As a result, <b>the federal poverty rates vastly underestimate actual expenses necessary for even a bare-bones existence.</b> A reliable and realistic measure of the minimal economic requirements of seniors will be increasingly necessary as national and state policy debates intensify and resources become scarcer over the next few years.</li> </ul> <p><b><u>Supporting Collateral:</u></b></p> <ul style="list-style-type: none"> <li>- <b>New Policy One-Pager</b></li> <li>- <b>New Advocacy One-Pager</b></li> <li>- <b>Elder Standard Policy Brief – Page 4</b></li> <li>- <b>New graphic representation</b></li> </ul>
	Direct service providers will be able to accurately measure and	<p><b><u>EESI BENEFITS FOR DIRECT SERVICE</u></b></p> Increases the capacity of direct service providers to work effectively with

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	<p>serve their constituencies, and to apply for funding to augment their programs.</p>	<p>senior populations.</p> <p>Examples of potential impacts on capacity:</p> <ul style="list-style-type: none"> <li>• Illustration of the difference between the number of seniors that fall below the poverty line vs. the number of seniors below the Elder Standard (data available in mid-2008)</li> <li>• Number of people currently being served who do not fall within the established "constituency" of the service provider (so, for whom the provider is not getting funding or credit).</li> </ul> <p>The Elder Standard will provide a much-needed tool for service providers to accurately evaluate their needs as well as providing a basis for leveraging additional foundation/public funding. <b>The Elder Standard quantifies in an empirical way what those in the direct service field know anecdotally.</b></p> <ul style="list-style-type: none"> <li>• Potential increase in serviceable community with the adoption of the Elder Standard</li> <li>• Increased ability to quantify funds needed using an objective, data-driven measure (i.e. the Elder Standard)</li> </ul> <p><b><u>Supporting Collateral:</u></b></p> <p><b>- New Direct Service One-Pager</b></p>
	<p>Policy makers will be able to more accurately measure the effectiveness of their existing policies and the need for policy change.</p> <p>Cal-EESI will also impact policymakers because their constituents will demand change (once they know about the initiative), from increases in the number of people served to more substantial policy benefits for needy individuals.</p>	<p><u>EESI BENEFITS FOR POLICY MAKERS</u></p> <p>Policy Makers will [now] have an accurate tool to be able to make informed policy decisions on elder issues.</p> <p>Using the Elder Standard may help improve efficiency of existing services by providing policymakers with a more realistic measure of specific areas of need and the effectiveness of existing programs.</p> <ul style="list-style-type: none"> <li>• Supporting Services -- in-home care may prevent premature institutionalization; Proactive health screens may reduce long-term healthcare costs</li> <li>• Housing example – more \$\$ being allocated to affordable housing could have huge, quantifiable impacts.</li> </ul> <p>EESI quantifies how effective the subsidies are by illustrating the real size of the gap between what is available and what is needed</p>

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		<p>Highlighting Impending Needs of Increasing Senior Population:</p> <ul style="list-style-type: none"> <li>• With Baby Boomers soon reaching retirement age, government needs to re-think strategies on how we provide support for the elderly.</li> <li>• Baby Boomers are the largest voting population in the country – Nations Encyclopedia</li> <li>• CAL-EESI is a measure for determining adequacy of investments (housing, other systems that they involve on).</li> </ul> <p>The California Self-Sufficiency Standard, a similar project to measure the cost of living for people younger than 65, has been used by many organizations and agencies to redefine income adequacy for families:</p> <ul style="list-style-type: none"> <li>▪ In three California state bills: AB 2386 (Keeley) and SJR 15 &amp; SB 1639 (Alarcón);</li> <li>▪ By city and county agencies (San Francisco, Santa Clara, Santa Cruz, Pasadena and Sacramento)</li> <li>▪ By researchers (Child Care Resource and Referral; Northern California Council for the Community)</li> <li>▪ By foundations to prioritize funding (United Way of the Bay Area)</li> <li>▪ By labor unions to compare workers’ wages to the cost of living (HERE, AFSCME)</li> </ul> <p><b><u>Supporting Collateral:</u></b></p> <ul style="list-style-type: none"> <li>- <b>New Policy One-Pager</b></li> <li>- <b>MA Findings Powerpoint</b></li> <li>- <b>Elder Standard Policy Brief – Page 4, 5</b></li> <li>- <b>New Graphic Representation of the Elder Standard Data</b></li> </ul>
	<p>Cal-EESI provides a planning tool so people of all ages can plan for their economic future and understand how their financial security is affected when their life circumstances change.</p>	<p>The Elder Standard will help advocates and direct service providers be proactive instead of reactive so they can help their constituents effectively plan for the future.</p> <ul style="list-style-type: none"> <li>• Equipped with data on the minimum income needed to make ends meet in retirement, older adults can make informed decisions about <i>when</i> they can retire, <i>where</i> they can retire, how much they need to save now, and whether they will need to continue working even after they formally “retire”</li> </ul>

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		<p>Elders will have an accurate assessment of retirement cost of living in their own community as well as any other communities that they may prefer to move to for retirement.</p> <p>Steve Wallace, the lead researcher for the Elder Standard at UCLA, tells a story about his friend in San Francisco who was planning for retirement and was blown away when he discovered how much money is needed to live at a modest level – by seeing an early version of the Elder Standard. He was then able to consider the Elder Standard’s applicability to his own individual circumstances by breaking down the totals by category (housing, transportation, food etc) and use this baseline in considering his savings goals. He realized he could not retire at the age he had originally planned and still make ends meet.</p> <p><b><u>Supporting Collateral:</u></b></p> <ul style="list-style-type: none"> <li>- <b>Elder Standard (County by County Data)</b></li> </ul>
<p><b>Message #3: What differentiates this initiative from others currently used to address issues of seniors’ economic needs?</b></p> <p>Cal-EESI brings together a diverse group of organizations and experts, supporting the only California-specific comprehensive, data-driven and localized initiative of its kind to measure and promote income adequacy for the elderly.</p>	<p>Cal-EESI uses the only financial model that accurately addresses the complexity of income adequacy for elders.</p>	<p>The Elder Standard is based on all of the costs older adults face on a daily basis – housing, food, health care, transportation, as well as miscellaneous costs. It has been well vetted by state and national advisory boards, and peer reviewed by two different prestigious research-based universities.</p> <p>Compare shift to Elder Standard to changes in Food Policy:</p> <ul style="list-style-type: none"> <li>• Hunger is a low bar – now reframed as food security (that encompasses people who can’t put food on the table every day as well as people who are fed but still can’t get their full nutritional needs met) – poverty line is like hunger and the Elder Standard is like economic security.</li> </ul> <p><b><u>Supporting Collateral:</u></b></p> <ul style="list-style-type: none"> <li>- <b>Elder Standard Policy Brief – Page 4</b></li> <li>- <b>Elder Standard (County By County Data)</b></li> </ul>
	<p>Cal-EESI empowers local communities to use the tools in a highly customized way.</p>	<p>The Elder Standard varies by county, housing situation and life circumstances. Communities can use these data points to support programs and policies in their own communities. For example, Mayor Villaraigosa’s Office in LA will incorporate the Elder Standard housing cost</p>

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		data in a new affordable housing initiative. The United Way of the Bay Area and other foundations will use this information to educate their grantees about the true cost of living for elders in their communities, as well as a way to justify a shift in funding priorities inclusive of elder services.
	The initiative provides a minimum dignified standard for the elderly to live above the poverty line—with realistic economic goals for the 21 <sup>st</sup> century.	<p>About the Federal Poverty Line:</p> <ul style="list-style-type: none"> <li>• Federal Poverty Line is based on 1950s research.</li> <li>• The Federal Poverty Line is a decades-old, one-size-fits-all measure based solely on the cost of a basic food budget to meet minimal nutritional requirements.</li> <li>• The Federal Poverty Line is a national calculation, so it is the same for everyone regardless of whether you live in Little Rock, AK or Marin County, CA.</li> </ul> <p>About the Elder Standard as compared to the Federal Poverty Line:</p> <ul style="list-style-type: none"> <li>• The Elder Standard takes factors into consideration that the Federal Poverty Line does not, such as the health of an older adult, their housing situation, and transportation needs, and it is calculated on a county-by-county basis.</li> <li>• While the Federal Poverty Line does not consider costs associated with aging, the Elder Standard is based on all of the costs older adults face on a daily basis – housing, food, health care, transportation as well as miscellaneous costs</li> </ul> <p><b><u>Supporting Collateral:</u></b></p> <ul style="list-style-type: none"> <li>- <b>MA FAQ</b></li> <li>- <b>WOW California Methodology Brief</b></li> <li>- <b>Elder Standard Policy Brief - Page 3</b></li> </ul>
	Cal-EESI uses the only elder-specific financial measure.	<p><b><u>Supporting Collateral:</u></b></p> <ul style="list-style-type: none"> <li>- <b>Elder Standard Policy Brief – Page 2</b></li> </ul>
	Cal-EESI uses the only financial measure of its kind backed by peer-reviewed research.	<ul style="list-style-type: none"> <li>• Well vetted peer reviewed data from a reliable source - UCLA</li> <li>• The component data included in the Elder Standard are publicly available and are already in use and widely accepted (e.g. HUD, USDA, MEPS). The Elder Standard repackages existing, reliable information to provide an accurate picture of the financial needs of elders in our</li> </ul>

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		<p>communities.</p> <p><b><u>Supporting Collateral:</u></b></p> <ul style="list-style-type: none"> <li>- <b>WOW California Methodology Brief</b></li> <li>- <b>Elder Standard Policy Brief – Page 2, 4</b></li> </ul>
	<p>Managed by the Insight Center, Cal-EESI is a frontrunner in the national movement to restructure the way the financial needs of elders are evaluated and addressed.</p>	<ul style="list-style-type: none"> <li>• Due to its size, population and political environment, CA was selected as one of the primary pilot states to launch this initiative.</li> <li>• California is the second state, after MA, to introduce an Elder Economic Security Initiative.</li> <li>• Three other pilot states will introduce the Elder Standard after California, with 20 states establishing EESIs within 5 years.</li> <li>• Research out of UCLA has helped hone the national methodology used in creating the Elder Standard.</li> </ul> <p><b><u>Supporting Collateral:</u></b></p> <ul style="list-style-type: none"> <li>- <b>WOW EESI National Methodology</b></li> <li>- <b>CA Elder Economic Security 2-pager (existing)</b></li> </ul>
<p><b>Message #4 -- Who makes up Cal-EESI? (core competencies)</b></p> <p>Cal-EESI is a broad-based coalition of organizations that reaches across all sectors dedicated to ensuring the well-being of elders and their families in California.</p>	<p>The California Coalition includes: policymakers, advocates, researchers, direct service providers and public agencies, seniors, non-profits, grant-makers, and senior membership organizations.</p>	<p>Key Allies &amp; Steering Committee Members include:</p> <ul style="list-style-type: none"> <li>- Assemblywoman Patty Berg, chair Assembly Subcommittee on Aging and Long Term Care</li> <li>- Senator Elaine Alquist, chair - Senate Subcommittee on Aging and Long Term Care and Chair of the Senate Budget Subcommittee on Health and Human Services</li> <li>- UCLA (Health Policy Research Center)</li> <li>- LA County Department on Aging</li> <li>- LA City Dept. of Aging</li> <li>- Alameda County Area Agency on Aging</li> <li>- United Way Bay Area</li> <li>- AARP</li> <li>- Stanford Geriatric Education Center</li> <li>- The California Endowment</li> <li>- National Council On Aging</li> <li>- California Alliance of Retired Americans</li> <li>- California Commission on the Status of Women</li> </ul>

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		<ul style="list-style-type: none"> <li>- On Lok SeniorHealth</li> <li>- California Advocates for Nursing Home Reform</li> <li>- National Senior Citizens Law Center</li> <li>- U.S. Department of Aging Women’s Bureau</li> <li>- UC Berkeley Center for the Advanced Study of Aging Services</li> </ul>
	<p>Insight Center’s Cal-EESI is leading the effort with organized statewide and regional steering committees that will roll out and institutionalize the initiative over the next five years.</p>	<p>Cal-EESI has organized a statewide steering committee to guide the overall direction of the initiative, review the Elder Standard methodology, and identify policy priorities—drawn from the Elder Standard data—to help close the gap between elders’ income and their rising cost of living in California.</p> <p>Cal-EESI has organized local steering committees across the state (mini-steering committees in different counties/regions) – responsible for looking at data to see how it can be used to educate local leaders and improve programs and policies for older adults. The local steering committees are empowered to roll out and institutionalize the tools in their own communities as they see fit.</p> <ul style="list-style-type: none"> <li>• Steering committees located in Los Angeles, San Diego, Santa Clara, Bay Area.</li> </ul> <p><b><u>Supporting Collateral:</u></b></p> <ul style="list-style-type: none"> <li>- <b>List of Statewide and local Steering Committee Members</b></li> <li>- <b>Strategic Plan CA Elder Economic Security Initiative</b></li> </ul>
	<p>Cal-EESI is a growing coalition, powered by an infrastructure of partners who will spread the word and become catalysts for adoption of the initiative in their own communities. The coalition will also develop and support state and federal policy priorities to help older adults reach economic security.</p>	<p>Managed by the Insight Center, Cal-EESI unites coalition building, research, education and advocacy at the local, county and state level. Chapters are organized throughout the state in strategic areas to be able to effectively respond to the need for local action.</p> <p>What differentiates your target audiences from your membership? What are the criteria by which you select members?</p> <ul style="list-style-type: none"> <li>• The statewide steering committee is representative of the different audiences we hope to reach through this initiative (e.g. policymakers, advocates, public agency and non-profit service providers, and foundations.</li> <li>• Criteria used to select steering committee members include 1) expertise in aging-related issues; 2) credibility within the aging community; 3) ability to influence federal, state and local public policy</li> </ul>

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		<p>and decision-makers; 4) geographic diversity; 5) accessibility or representation of a membership base of seniors; and 6) access to resources to help move an aging agenda forward</p> <ul style="list-style-type: none"> <li>• Most participants volunteer their involvement because it's in alignment with their mission.</li> </ul> <p>Cal-EESI welcomes those who provide direct services, as well as those who have an overall interest in elderly issues. We are specifically targeting audiences that can influence policy or provide direct services with an immediate impact on seniors.</p> <p>Cal-EESI has an organizational model that allows partners to be leveraged when necessary without the same commitment being required of every partner.</p> <ul style="list-style-type: none"> <li>• Cal-EESI activates its partners through:             <ul style="list-style-type: none"> <li>- Regular meetings and a growing listserv</li> <li>- Specific "calls to action" and sign-on letters</li> <li>- Leveraging of partners' existing relationships (e.g. with policymakers, aging agencies, and the press)</li> <li>- Newsletters and web updates</li> </ul> </li> </ul> <p><b><u>Supporting Collateral:</u></b></p> <ul style="list-style-type: none"> <li>- <b>CA Elder Economic Security 2-pager (existing)</b></li> </ul>
	<p>A next step in implementing Cal-EESI's goals is defining how local partners can continuously use and institutionalize the standard in policymaking, advocacy, and direct service provision.</p>	<p>Cal-EESI aims to get partners involved to the point where they can be leveraged when necessary.</p> <p>What will this leveraging look like?</p> <ul style="list-style-type: none"> <li>• Sending a busload of low-income seniors to Sacramento to attend a public hearing on EESI; signing on to adopting the Standard; creating regional delegation to lobby in Sacramento and Washington for policy change. Connecting to policymakers and foundations that support our work. Using partners' expertise to create a broad-based policy agenda to close the economic gap for seniors. Being leaders for Cal-EESI in their own communities. Asking a foundation president or aging agency leader to call a legislator in their district to pressure them to sign a bill Cal-EESI supports. Unifying aging agencies across the state to pressure the Governor's Office to prevent further cuts to senior</li> </ul>

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<p><b>Message #5: How will Cal-EESI measure the success of getting the word out about this initiative and its impact on intended audiences?</b></p> <p>Cal-EESI’s success will be determined by the number of people aware and involved, the number of people and institutions using the Elder Standard, and ultimately by a paradigm shift in policy, advocacy and direct services for elders.</p>	<p>Success is getting the word out to our target audiences, funders, and people on steering committees so the Elder Standard is used on a local, statewide, and national basis.</p>	<p>services.</p> <p>Success will be determined by the size of Cal-EESI’s coalition and steering committee.</p> <p>Success of the rollout includes steering committee members being invited to attend and present at important conferences and meetings related to aging issues.</p> <p>Success could also be measured by the level of official public support for the Elder Standard</p> <ul style="list-style-type: none"> <li>• Example: LA passing a resolution to urge the federal government to develop a new measure for calculating the senior poverty – one like the Elder Standard</li> <li>• Example: Policymakers and public agency leaders adopting the Elder Standard in strategic plans for the elderly, general plans, and new affordable housing initiatives. Policymakers using the Elder Standard as indicators in reports of success in their own policies/programs for seniors (e.g. “Senior Count”</li> <li>• Policymakers and agency administrators expanding eligibility criteria for accessing services, based on the Standard</li> </ul> <p><b><u>Supporting Collateral:</u></b></p> <p>- <b>“What Legislators are Saying” document - MA</b></p>
	<p>Success is introducing the Elder Standard into the current political and advocacy dialogue about the financial status of elders in California.</p>	<p>Leveraging the current political and economic environment to use the term and adopt the standard, since adopting it won’t cost money.</p> <p>Success would be getting the Elder Standard into the public record.</p> <p>We would like to see the Elder Standard referenced in legislative testimony, bills and used as a resource by key agency staff when developing or determining cuts/increases to programs geared to serve the elderly. We would like to see the Elder Standard also referenced by credible legislative and policy analysts (e.g. Legislative Analysts Office, California Budget Project.)</p> <p>The Elder Standard will be used as a tool to help advocacy organizations and service providers accurately display the need for increased funding</p>

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		<p>either for their programs/capacity or to advocate for additional support or against potential cuts.</p> <p>The number of policymakers using the Elder Standard will determine success.</p>
	<p>Success is reaching goals and getting regions functioning to change policy in a definitive way- with measurable outcomes.</p>	<p>Cal-EESI can measure progress toward this goal by:</p> <ul style="list-style-type: none"> <li>• Surveying coalition members, etc.</li> <li>• Crafting tools for data collection that can be used when WOW hires a third-party evaluation firm. Will drill down to state level.</li> <li>• Strong anecdotal examples of the way the Elder Standard has been used in public policies, grant making, fundraising, and educational forums.</li> <li>• Being able to protect status quo (or at least loose no more than 10% from senior services in the current budget crisis).</li> <li>• Regional partners empowered by Cal-EESI and eventually asserting their own leadership in institutionalizing the Cal-EESI tools and initiative goals in their own communities.</li> </ul>
	<p>Foundations adopting it or accepting grants using it.</p>	<p>Members of the Cal-EESI steering committee who are currently involved in allocating grants/providing funding can encourage applicants to use the Elder Standard in presenting their needs</p> <ul style="list-style-type: none"> <li>• Example: The Santa Clara-based Health Trust hopes to have their applicants use the Elder Standard in requesting funding</li> </ul> <p>Success could be determined by:</p> <ul style="list-style-type: none"> <li>• The number of grants received using the data</li> <li>• The number of funders requesting or accepting Elder Standard-based requests</li> </ul> <p>Members of the Cal-EESI steering committee and others who are grant makers could use the Elder Standard to justify shifting some of their funds to support senior economic issues.</p> <ul style="list-style-type: none"> <li>• An increase in the amount of existing funds directed at the senior population (e.g. United Way of the Bay Area)</li> </ul> <p>Foundations could also encourage grantees to use the Elder Standard and</p>

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		<p>related tools to measure the impact of their services, and to counsel seniors, baby boomers and caregivers.</p> <p><b><u>Supporting Collateral:</u></b></p> <ul style="list-style-type: none"> <li>- <b>New Direct Service, Advocacy, Policy One-Pagers (depending on the org and the funder)</b></li> </ul>
	Amount of media coverage about economic security for the elderly.	<ul style="list-style-type: none"> <li>• Initial media coverage of the launch will be a rough indicator of success.</li> <li>• To determine success longer-term success, Cal-EESI would need to benchmark media attention on the issue now, and revisit coverage levels 6-12 months down the road with a statewide clip count.</li> </ul>
	Long-term goal: replacement of the federal poverty line.	<ul style="list-style-type: none"> <li>• Need to re-address the issue in another 5, 10, 20 years and make sure EESI is up to par with future socio-economic indicators.</li> </ul>