



The NORC Supportive Service Program

Anita Altman

Deputy Managing Director
Office of Resource Development
Department of Government Relations & External Affairs

UJA-Federation of New York is a network of 100 social service and health care organizations, which serve the New York metropolitan area. Each year, our network of agencies provides care for millions of New Yorkers on a non-sectarian basis. With such a commitment, the UJA-Federation local agency network has a highly evolved and sophisticated array of agencies, which serve the senior community. And it's obvious why; New York's population is aging, with seniors, those over 60 years of age representing 16% of the total population, while in turn the elderly represent 24% of New York's Jewish population.

The history of the NORC-supportive service movement which started in New York is dynamic and continuously evolving. It emerged from simple but key insights:

1. Many communities built originally for families now have high concentrations of seniors, who are aging in place;
2. Significant numbers and density of senior residents can provide a critical mass to justify locating services on-site, where the seniors live;
3. Effective and efficient services can be organized to help enable seniors to remain in their own homes even as they grow older and frailer

In this presentation, I will give you a brief description of what constitutes a NORC; describe both the exciting supportive service program model that was developed to address the challenges and opportunities posed by this phenomenon; as well as the dynamic role that UJA-Federation of New York is continuing to play in promulgating and improving it.

In 1986, an enlightened Board of Directors of the Penn South Housing Corp., a development with 2800 units of moderate income housing, approached UJA-Federation about the terrible problems that they as a community were facing as a majority of their residents had become senior citizens, aging in place. They described the difficulties that many of these individuals were having in coping with growing infirmities and the minimal social and health care services available to them. They also recounted the problems that these residents posed to the housing management, which was unable to provide the support services these individuals needed. Out of these discussions emerged the Penn South Program for Seniors (PSPS), a service program established on-site, by a consortium of UJA-Federation network agencies, which provides social, recreational, case management and nursing services. What we learned from that encounter was that NORCs or naturally occurring retirement communities like Penn South were an excellent environment in which to create and foster supportive service programs, programs that would help enable people to remain in their own home as they grew older and frailer. And so began our own sojourn in helping to develop a program model with our service agencies, which is revolutionizing the delivery of services to tens of thousands of older people in New York State, and now across our country.

So what's a NORC? A NORC is a naturally occurring retirement community, a community, neighborhood or building originally built for families, but in which overtime a significant percentage of residents are now seniors. In New York State we have developed programs that respond to the needs of what we call classic NORCs, those in large apartment complexes or buildings, which have a common ownership and neighborhood NORCs, which are more typical

of our suburban communities, single family homes and small apartment buildings in which there is no common ownership. A 1994 study commissioned by the Robert Wood Johnson Foundation found that there were an estimated potential 5,000 NORCs across the United States.

The supportive service program which was developed in response to these demographics recognizes and embraces the role that the community must play to help foster and sustain the seniors living among them. Moreover, it recognizes the key role that seniors themselves have to play in the building and fostering of a supportive community. Seniors are recognized as:

1. A resource who have much to contribute from their life experience;
2. Partners, whose aspirations and needs help to shape and define the program services;
3. Needing to be deeply involved in the program's governance.

Moreover, supportive service programs are:

1. community builders, which when successful help to reweave and strengthen the social fabric of the community
2. partnerships, partnerships that bring together housing entities, co-op boards or housing managers, their residents, social service and health care providers, government and often philanthropy;
3. recognize that no one agency has the capacity and skills necessary to provide the array of services;
4. developed only after a process of assessment of community needs, interests, resources, and services;
5. located on-site in the community that is to be serve
6. eligibility to participate is determined by age and residence, not by ability to pay or functional status
7. do not duplicate existing services, rather they mobilize these services on behalf of their clients; they identify gaps and develop services and programs to address them;
8. the community and housing entities must participate in the governance of these programs
9. seniors across the age spectrum, not only those most frail should be able to benefit from the program;

So what services do NORC Supportive Service Program actually provide?

In New York CORE services include:

1. Social work services which include: information and referral, assistance with securing entitlements, case management, service linkage and coordination. Support is provided to both the individual and caregivers. There is no fee for these services. These programs do not duplicate services that already exist in the community, rather they mobilize, organize and co-ordinate those services on behalf of the residents. So for example, community

providers may already be providing meals on wheels, or in-home services or adult day programs, the program's responsibility is to access them for their client.

2. A nurse, who is an integral and critically important member of the service team, provides health services. These include: educational programs on prevention and promotion, assists individuals with chronic care management, services that are not covered through our Medicare program, but which are critical to helping sustain an individual with a chronic condition (many seniors) in the community; blood pressure screenings, interfacing with physicians to help translate client needs. All senior residents are eligible for these services.
3. Social and recreational activities, which often engage and involve the younger members of the community. These include classes, often led by seniors themselves, trips and other group activities. Most programs charge a modest membership fee to help support these programs;
4. Volunteer Opportunities greatly depend on the commitment and energy of seniors who give of their time and skill in a wide variety of ways to the programs, from assisting in the office, teaching classes, escorting neighbors...these programs mobilize the talent and resources of their residents. A recent survey of volunteer programs identified 46 different jobs at NORC program sites that volunteers are performing in these programs. In 2002, there were 870 volunteers who gave their time and energy to these programs.

Ancillary Services

These supportive service programs are idiosyncratic to the communities in which they are located. They depend on the needs and aspiration of community as well as the capacity of the program to fund it. These services differ from one site to another and can include for example: *transportation, social adult day care, housekeeping, and financial management.*

A hallmark of the program is the leveraging of services, made possible because of the very existence of these programs. Examples of such secured services include: *geropsychiatric fellows, social work, occupational and physical therapy students, legal Services, health screenings.* Programs can negotiate discounts from local merchants and more favorable home delivery arrangements.

How are these funded?

Originally funded entirely by philanthropy, UJA-Federation recognized that for this program to continue and grow that long-term, dependable sources of funding were critical, which would have to come from government. Once the effectiveness of this program model was proven, UJA-Federation advocated for the creation of state legislation to provide ongoing funding for our programs, as well as for those we hoped would be organized. In 1994 we succeeded in securing legislation and \$1.2 million of funding, which has since grown to \$4.2 million. In 1999 we secured \$4 million from NYC, which has

since grown to \$6.5 million. Currently there are 54 communities across New York State, which have supportive service programs, 28 of them led by UJA-Federation of New York service agencies. These funding streams support a public/private partnership, with the state putting up a maximum of \$150,000, but no more than 50% of a program's budget and the city \$250,000 but no more than 2/3's of a budget. The city and the state both recognized the importance of building a broader funding base for these programs, and the critical role that housing must play. Housing's financial involvement heightens the likelihood of their own commitment to helping make these programs succeed. Therefore the housing entity, whether it's a co-op board or a private landlord is required to contribute financial support. In Neighborhood NORCs individual membership fees are required in lieu of a housing contribution. Programs must also generate other sources of support. While philanthropy has continued to invest in these programs, local communities generate other sources, which have included: membership fees for social programs, community fund-raising activities-flea markets, book sales, etc. Program partners often make in-kind contributions, e.g. space, personnel, equipment.

Since 2001 the United Jewish Communities has played an instrumental role on the national level to raise public awareness about the potential of NORC supportive service programs, and has helped to secure over 40 " earmarks" or one-year grants made by individual congressmen and senators to local Jewish agencies to organize their own version of a supportive service program. UJC and UJA-Federation working in conjunction have succeeded in securing a federal NORC-SSP demonstration grant program in last year's reauthorization of the federal Older Americans Act. Now we are actively seeking to secure an allocation in this year's federal budget, which would enable a National NORC-SSP demonstration program to be realized. In the meantime, a number of state legislatures are following New York's lead and are considering passage of legislation establishing their own NORC-SSPs.

At this time there are more than New York seniors (45,733 in NYC NORCs) who reside in communities with supportive service programs.

We know: (a) that this program is effective in assisting people to remain at home, living as independently as they can, (b) that it brings rationality to the health care and social services system, by making efficient and appropriate use of service; (c) it helps build and reinforce community. It provides necessary support to neighbors and families to help them be there as the elder becomes more infirmed. It provides a supportive structure for a community to constructively channel their energies on behalf of those less able.

We in New York State were the pioneers. The creation of the NORC Supportive Services Program is enlightened social policy. We have developed an affordable service model which is effectively addressing the challenge posed by a significant segment of our rapidly aging population. In September 2005, the US Administration announced that New York City's Department for the Aging and its NORC-OSSP model won a national competition, which singled out the program for "overall excellence on innovative models for developing livable communities for older people in this country." UJA-Federation has made a significant contribution to the field of aging services by bringing the concept of NORCs and their potential as an important locale for the delivery of services into the public consciousness. As we look to the future and recognize the challenges to our geriatric, social and medical service systems

resulting from the explosive growth of the senior population, it is likely that the NORC-SSP model, which mobilizes and organizes the human, professional and financial resources of a community to sustain and support individuals in their own homes, will make a significant contribution in helping our society to address those needs

NORC-SSP Resource List

Altman, Anita, (2006). The New York NORC-Supportive Service Program. *Journal of Jewish Communal Service*. 81: 195-200.

ASPE, *Annotated Review of the Literature on Housing with Services for Older People Who Age in Place*. (<http://www.aspe.dhhs.gov/daltcp/reports/NORCsspA1.pdf>)

Masotti et al. (2006). Healthy Naturally Occurring Retirement Communities: A Low-Cost Approach to Facilitating Healthy Aging. *American Journal of Public Health*. 96: 1164-1170.

(http://www.ajph.org/cgi/content/full/96/7/1164?maxtoshow=&HITS=10&hits=10&RESU_LTFORMAT=&author1=Masotti&searchid=1&FIRSTINDEX=0&sortspec=relevance&resourcetype=HWCIT)

University of Albany, *NORC Bibliography* (<http://www.albany.edu/aging/norc.htm>)