



**Forum on
National Service and
Independent Living for
Seniors**

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Forum Cosponsors:

AARP
The National Council on the Aging

And with the assistance of:

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Service
U.S. Administration on Aging, Department of Health and
Human Services

About ICP:

Innovations in Civic Participation (ICP) is a non-profit social change organization that provides expertise, ideas, information, and advocacy support in the United States and around the world to develop and strengthen policies and programs that promote political and civic engagement through service. In 2003, ICP hosted a forum in Washington, D.C. on the impacts of national service on three critical social issues -- youth development in out-of-school hours, rural development, and helping seniors live independently. This year, three leadership conferences are planned to focus on service as a strategy in each of these issue areas, culminating in a Congressional policy briefing in December 2004. For more information, visit www.icicp.org.

This report was prepared by Anne Lewis with the assistance of Grace Hollister of Innovations in Civic Participation, December 2004.

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Introduction

ICP's October 2004 Service as a Strategy forum focused on a truly critical issue for American society – independent living for seniors. As the American population ages and people live longer, there will be an increase in the number of people who will require support services to live independently. The problem is occurring not just because of the sheer number of “baby boomers” but because Americans are living longer due to the success of our health care system. Research shows that by 2015, the number of people needing assistance will increase at a rate significantly higher than the number of people able to provide care, creating a crisis in long-term care and independent living support.

It is imperative that the nation improves the structure supporting a burgeoning senior population without breaking the public bank or exhausting the resources of millions of care-giving families. The goal of independent living for seniors at a level of quality most would wish for themselves and their loved ones can only be achieved by an intensive, urgent marshalling of public, private, and non-profit resources and weaving them together into a safety net. Innovations in Civic Participation and the co-sponsors of the Forum, AARP and the National Council on the Aging, believe it is essential to draw upon the deep well of national service participants and volunteers as a major element of our independent living goals.

The October 2004 forum built on work that began in May 2003, when a smaller group of leaders met to discuss position papers and to develop an agenda on several challenges to society where service could be an important player, including independent living. Goals for the 2004 event included illustrating the potential of service as a strategy for independent living for seniors with examples of effective national service programs; encouraging the aging and service communities to exchange information about what works and to work together more closely; and developing policy recommendations for funders and policymakers.

This is a detailed report of the Forum on National Service and Independent Living for Seniors. It includes major presentations, panel discussions of exemplary programs, and reports from small group discussions on next steps and recommended policies.



Opening Session

The Forum, held at AARP headquarters in Washington, DC, draws attention to the fact that 2004 marks the 10th anniversary of the first grants by the Corporation for National and Community Service, Susan Stroud, executive director of Innovations in Civic Participation, told the opening session. One of the reasons for organizing the Forum, she said, "is to focus on what national service has been doing across the country in the past decade." It also is a look forward, following up on a meeting 18 months ago that outlined how national service could meet the challenge of ensuring quality independent living for seniors. "We hope," she explained, "to take the dialogue initiated last year to a new level, learn about what works, and inspire leaders of national service and advocacy for seniors to work more closely together."

In his opening statement, John Rother, director of policy and strategy for AARP, pointed out that the challenge of independent living was not limited to elders. There are people with functional limitations in all age groups, he said, and their limitations grow more severe with time. The problem of developing policies and actions to promote independent living is not occurring just because of baby boomers, but "because of the success story in health care, which is keeping people alive longer."

Addressing the session's theme of "Gaps, Options, and Opportunities," Rother outlined what seniors and others need in order to live independently:

- Information. The United States does not have a long-term care system or a centralized, comprehensive source for information. "Families struggle to patch together services to keep senior members at home," Rother said. Volunteers could be information resources, finding options for people and providing referrals to sources within communities.
- People. Most seniors need some help on a continual basis, and currently most of the kind of care that keeps seniors independent is provided by the family, perhaps for 80% of seniors. The ratio of people available to do this is declining, primarily because there are fewer close family members. "We will need to double the formal workforce in this area," Rother said, but this is a field with a high

turnover rate because of low pay. "We need to see how to use volunteers to fill the gap and to persuade those who will be working longer in the future to see this as a growth field."

- Expansion of services. An AARP survey of seniors over age 50 with disabilities asked what services they needed to make their communities livable for them. Their priority, Rother said, was mobility – to get to doctors' appointments and to the grocery store. Transportation was cited as a particular problem in rural areas, and all seniors wanted more services in their homes. He described a joint project between AARP and Home Depot, which is putting kiosks in some stores to give information on how to modify homes for independent living. Rother also stressed the critical need to provide respite services for those "who are at their limit in terms of stress and energy" in trying to provide care to senior family members.

While the Corporation's 10th anniversary deserves celebration, Rother reminded the Forum participants that the Senior Companion program preceded it by many years, launched as part of the War on Poverty in the 1960s. Through stipends to senior-age companions, it primarily has been an income-producing service for the elderly. The challenge is to take it to scale, he said, and to allow seniors of all economic levels to become involved in service to the elderly. Another positive model is Experience Corps, which places seniors with abilities to share in situations where they can make a difference. Their big success, according to Rother, has been in education, "but it has been hard to take this model and transfer it to independent living. We need some successes with it in order to take it to scale."

Alan Solomont, Chairman and founder of HouseWorks, whose mission is to help seniors stay independent in their homes, made a striking point: "This is

"We are facing a demographic tsunami, the likes of which have never been known before on this planet."

Alan Solomont

the first generation with more parents than children." Until very recently a member of the Board of Directors of the Corporation for National and Community Service (CNCS), Solomont likened the coming challenge of caring for an aging population to a "demographic tsunami...with the potential to overwhelm us." The issue is not just an economic one for families and public coffers, he said, it is also a quality of life issue for seniors and all those who struggle with infirmities.

Solomont began his career as an orderly in a nursing home, later obtained certification in nursing, then became the owner of large elderly care companies, both in institutions and in homes. He first became aware of the value of volunteers, he said, as a nursing home director in the 1970s.

Long-term care, according to Solomont, was not on the national agenda until former President Bill Clinton raised the issue and presented a modest plan that essentially said: "Families, this is your problem but here is what the federal government can do to help," which included funding to provide information about Medicare and long-term care insurance for federal employees. Despite its limits, "the message was clear" that action needed to be taken by families and the government.

When Solomont joined the executive board of the Corporation for National and Community Service, he believed it was all about AmeriCorps, but during his term, he saw opportunities to extend senior service in every area of the Corporation's work. The Corporation's new strategic plan designates independent living as one of several focus areas across all programs of the Corporation – AmeriCorps, Learn and Serve America and Senior Corps. An "incredible" opportunity exists, he said, to use "an expanding and maturing service movement to focus attention on serious national problems." The federal government has been able to respond in such areas as literacy and homeland security, he said, "and I believe we have the force to ramp up" its attention to long-term care. "Together, we must make the case that volunteers can provide crucial support and much needed respite services for caregivers and families."

Panel members:

Tess Scannell
Director, Senior Corps
Corporation for National
and Community Service

Adriane LaRoza
Executive Director
Volunteer Services of
Manatee County

Dwight Rasmussen
Program Manager,
Senior Companion/Foster
Grandparent Programs
Salt Lake County Aging
Services

John Pribyl
Director of Senior Corps
Programs
Lutheran Social Services
of Minnesota

Evonne Bennett
Community Cares
Program Director
Tennessee's Community
Assistance Corporation

**Service as a Strategy:
Four Programs That Contribute to Keeping
Seniors Living Independently**

The breadth and depth of local programs that help seniors lead independent lives was captured in a panel discussion of four initiatives from across the country. Moderator Tess Scannell, director of Senior Corps of the CNCS, noted at the beginning that such programs are often involved in multiple nationally funded services for seniors.

ManaTEENS

The ManaTEENS program of Manatee County, Florida, started as one 12-year-old's idea, now puts 10,000 teens to work with 550 nonprofit organizations, communities of faith, and schools in southwestern Florida on an enormous variety of

services, including assistance for seniors who want to live independently. In the first years of the program, explained Adriane LaRoza, executive director of Volunteer Services of Manatee County, local organizations made limited use of the young people, assigning them to clean up grounds or be jumpers for meal deliveries, “but after we formed a youth council for determining what projects should be undertaken and obtained some funding, the program took off.” Today, the ManaTEENs provide a dizzying array of services for seniors, often in collaboration with AmeriCorps members.

Learning How to Serve, Early

Ten years ago, one 12-year-old in Manatee County, Florida, organized a small group of her peers to help seniors, who outnumber youth 12 to 1 in the county. Now, there are 10,000 youth in southwestern Florida associated with the ManaTEENs organization. In the last two years, they helped more than 37,000 seniors to live independently.

A Learn and Serve America grant helped expand the scope of ManaTEENs, including providing an aging sensitivity course in high schools with the help of AmeriCorps members. Young ManaTEENs use other funding for building projects in seniors’ homes such as installing door locks, lowering doorknobs, painting, and creating “Caution Zones” in which environmental hazards such as old tires and batteries are removed. The teens also teach seniors the importance of ridding homes of such hazards. An Adopt a Grandparent program enlists the help of a ManaTEEN’s family in providing companionship, transportation, and minor home repairs for a senior.

“We like to consider ourselves an AmeriCorps farm team,” LaRoza said, noting that 60 of the alumni from ManaTEENs have continued to serve when they were older in AmeriCorps. Currently, five AmeriCorps members work with ManaTEENs, all of them former members of ManaTEENs - including one of the young people who founded the organization.

Salt Lake County Aging Services

This is another anniversary year, Dwight Rasmussen, reminded the participants – the 30th anniversary of the

Senior Companion program. As program manager of the Senior Companion/Foster Grandparent Program in Salt Lake City, he is concerned with the needs of more than 97,000 seniors over age 60 and their caregivers. “If you ask seniors in long-term care where they would prefer to be, most will want to be at home,” Rasmussen said. “Often, it is the loneliness that pulls them down, so they wind up not eating properly. All they need is someone coming in regularly.”

Respite care, according to Rasmussen, “may be the door to expanding national service opportunities in the independent living field.” He also said that the Senior Companions program needs to be opened up to all volunteers wanting to participate “without cutting out the low-income seniors.”

Lutheran Social Services of Minnesota

If the Senior Companion program could be expanded, it might change the image some professionals have toward senior caregivers, according to John Pribyl, director of Senior Care Programs of Lutheran Social Services of Minnesota. When his program of Senior Companions/Foster Grandparents started about 30 years ago, "a public health nurse asked: 'Why do I want more old people to take care of?'" he said. "I'm still hearing that senior caregivers bring problems not resources." Part of the problem, he said, is that American society does not value volunteerism. In his own state, however, caregivers and recipients around the state organized to save the program, protesting a governor's budget proposal that would have eliminated it. Some of the caregivers in his programs "become closer to the seniors than the seniors' families. The seniors want to put them in their wills." Pribyl pointed out an irony: the state spends \$890 million on nursing home care and only \$90 million on independent living care, "but where do seniors want to be?"

Three Decades of Senior Companions

The providers in the Senior Companion/Grandparent Program in Salt Lake City, Utah, receive 40 hours of orientation training, and then become advocates for at-home seniors, helping to extend the work of professionals. One of the first Senior Companion Programs in the country, it has been operating for 30 years in a county that now has 97,000 senior citizens. The program also is now part of a 12-site demonstration study, known as Legacy Corps, that is being conducted by the University of Maryland Center on Aging in which people 50 years and older are serving in AmeriCorps to provide assistance to seniors and respite care for families.

Minnesota's Senior Care

The Senior Care Programs of Lutheran Social Services in Minnesota now has 400 Senior Companions, 400 Foster Grandparents, and more than 30 AmeriCorps team members working with more than 100 agencies across the state. Director John Pribyl estimates 185,000 people are receiving care through these networks. Using a Medicaid waiver provision, Pribyl has been able to provide different services in seniors' homes for people over the income cap set by the Corporation for National Service, although of the 400 working under the waiver, 300 would have qualified under the regular Senior Companions program. The program uses a tiered stipend system and places Senior Companions from 40 to 80 hours a month in seniors' homes.

He termed the regulations that restrict the programs through the income cap or to those over 60 years of age ineffective and out of touch with demographics. In order to appeal to retiring baby boomers, "we need to get out of the regulations limits and become more flexible...the [Medicaid] waiver program has allowed us to serve so many more people," Pribyl said. Also, he believes that some

families would be willing to pay for services if companion services were more flexible.

Tess Scannell pointed out that the Senior Corps program supplied technical assistance for all states to use the elderly waiver's assistance dollars to fund Senior Companions programs. Many states in addition to Minnesota have since adopted this model.

Tennessee's Community Assistance Corporation

AmeriCorps members are the "key" to the Tennessee's Community Assistance Corporation seniors program, according to Evonne Bennett, Community Cares AmeriCorps program director. Focused on low-income frail elderly and challenged individuals who want to remain in their homes, the program serves 20 counties across the state.

Through a partnership with local organization A Better Day, the Corps members help seniors fill out paperwork that enables the organization to acquire equipment and other supplies for free through Medicare and Medicaid. Bennett said the Community Cares program receives many references for services from doctors "who recognize when seniors need companionship help."

Tennessee Program Depends on AmeriCorps

The Tennessee Community Assistance Corporation uses AmeriCorps members extensively in its seniors program. They often may be the only Corps member in a county (the program serves 20 counties), but they still can be effective as advocates and as links to available services. They provide homemaker services, transportation, home safety, and delivery of meals. The Corps members also take disaster training and mobilize volunteers to be ready to help.

The forum participants' discussion of the programs raised several other issues or underscored those of the panelists. Almost all of the program examples cited transportation, and the time needed for it, as one of the major needs for volunteer help for seniors. Professional caregivers should not be spending their time providing services outside of the personal care for which they are trained and licensed, it was noted. Similarly, family practice doctors need "respite" from taking care of non-medical needs that could be done by volunteers. Several participants contended that AmeriCorps members assigned to independent living assistance can become motivated to consider this area as a career. While some policymakers have voiced objections to paying stipends to volunteers, their criticism dissipates when they learn that the stipend is only \$2.65 an hour, program directors said.



Report from the Corporation

The challenge before the Corporation for National and Community Service is to keep the successful, personal strategies used in Senior Corps and make them more available to meet a burgeoning need for volunteers as the means to independent living. This was the assessment of David Eisner, CEO of the Corporation. Studies of the Senior Companions program, he said, found that the participants were making real contributions and earned high quality ratings from the programs.

Eisner agreed with panel members that the income and age eligibility regulations for the Senior Companions program need to be removed or raised significantly. He also supported more intentional efforts at persuading AmeriCorps members to consider independent living support as a career choice. Similarly, Learn and Serve America grants should be used deliberately to encourage young people to think of independent living as not just a good cause but also as a career or focus for entrepreneurship, he said. However, Eisner cautioned against one strategy that had been discussed – applying an income-generating business model to service programs in the area of independent living. Entrepreneurial enterprises might serve more customers, he admitted, “but I am not sure if Congress or I could take the risk of moving our volunteers out of an all-volunteer mode to a semi-profit one.”

Looking to the future of service in support of independent living, Eisner discussed several issues:

The ManaTEENs are a great example of the power of using youth...to solve problems, and seniors are in the same boat. They need our support...to be seen not as costs and problems but as drivers of solutions.”

David Eisner

- The need to figure out how to raise awareness that service is part of the solution to the impending waves of seniors needing support. “The urgency is not there,” he said, “and the idea that individuals can play a role is not strong.”
- The need for greater intentionality in linking programs and making them more flexible.
- A focus on forming partnerships with other programs. Mentoring of young people, for example, has “caught fire,” moving from a few

hundred thousand young people in intentional mentoring to 2.5 million. The program employs a structured relationship as a model, "and we need to find a way to tap into that structure." He believes the volunteers can be found, but currently "we don't have the means to train and supervise them."

- Better use of technology. "We haven't scratched the surface of using online information," Eisner said. SeniorNavigator is an online resource providing health and aging information to Virginia residents. SeniorNavigator centers are staffed by volunteers who give free access and assistance of the website's resources to seniors without computers or internet access. Another tool is BenefitsCheckUp, a service of the National Council on the Aging, which volunteers could use to find out what benefits are available to seniors, possibly lessening the burden on caregivers. "The connection has not been made yet between tools and volunteers," he said.
- Helping non-profit partnerships understand they can get assistance in building linkages between their clients and themselves. "We need to target all non-profits on health care, transportation, and other services which they haven't yet figured out how to get information on and to make linkages," he said.

Up to now, Eisner concluded, the Corporation has not had an intentional focus on independent living, "but we have moved forward and we are now looking at different models. You will see the emphasis in our programs across the board."

Seniors Successful as Companions

About 57,000 seniors were being helped to remain in their homes through the Senior Companions Program in 2004, its 30th anniversary. The program is both an economic success and a quality success, according to data collected on the program.

The estimated value of Senior Companions' services was \$190 million in 2004, or four-fold the federal dollars invested. The cost of supporting one Senior Companion for a year is about \$4,000, compared to the average nursing home cost of \$40,000.

A RTI International study of the quality of care provided under the program found that 93% of the volunteer station supervisors were very satisfied with the overall quality. Two-thirds of the agency staff said Senior Companions freed up their staff to do other agency work. Senior Companions were as responsible as paid volunteer staff, according to almost 80% of the supervisors. The Senior Companions kept the clients company, assisted family/caregivers by giving them time off, were available for emergencies, and made phone calls for the clients, and in this capacity served as extra resources for agencies.



Small Group Discussions

Three discussion groups integrated the panel presentations and speakers' remarks with work already done at the 2003 meeting to develop recommendations for actions that would raise the importance of the issue and to help others understand the important strategy that national service represents to deal with the needs for growing numbers of older people to remain living independently.

The three issues covered in the group discussions included:

- Creating pathways from service to the independent living support field; exposing people who serve in national and community service program to the careers opportunities that exist in the field
- Ramping up public support for and awareness of national service volunteers as a critical component of the continuum of care
- Creating alliances between policymakers and programs in both the service and long-term care fields in order to define and embrace common goals

The task for these small group sessions was to determine: *Are these the right strategies? What other strategies make sense? Which strategies are most promising? What concrete steps could happen right now to move this agenda forward? What could your organization do to help?*

At the end of the afternoon, the three groups met together to report out their findings, and to share their thoughts for the future.

**Creating pathways
from service to the
independent living
support field**

The challenge: Given the projected increases in the number of people requiring support to remain living independently in the next 10 to 15 years, a priority for policymakers should be to develop greater interest in the field of gerontology. Research has shown that by 2015, the number of people needing care will be increasing at a rate significantly higher than that of the number of people able to provide care, including family members and paid caregivers. To reverse this trend, the field needs to look to new sources of employees and address poor retention rates due to low wages, long hours, and inadequate training.

The opportunity: All streams of national service programs - Learn and Serve America, AmeriCorps, and Senior Corps - expose people of all ages to the realities of what resources are necessary to keep people living independently in their homes and provide important career possibilities in nursing, gerontology and other related careers. It is important to capture the energy that service members bring to their work and turn their experience into longer-lasting impact in a variety of related career fields.

The question: Can we do more to use national and community service as a strategy to encourage people of all ages, especially young people, to enter careers in fields experiencing shortages – and give them the training they need to be successful? Can national service help support career paths in the field necessary to retain staff?

Strategies: National service offers participants an intensive, experiential opportunity to learn about careers in the aging field. These individuals have already shown their interest and commitment to helping others and will have

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Learn and Serve America

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Karen Harlow-Rosentraub,
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Indianapolis*

Diane Hill Taylor,
AARP

Karen Key,
AARP

Adraine LaRoza,
Volunteer Services of Manatee County

Sharon Markham,
Retirement Research Foundation

Sally Richter,
Care Link AmeriCorps/Faith In Action

Earl Shelp,
Interfaith Care Partners

Frank Slobig,
The National Council on Aging

Laura Wilson,
*University of Maryland Center on
Aging*

a realistic picture of what long-term care entails. More effort should be made to help these individuals stay on the path to careers in the field of gerontology. The following strategies have been suggested to use national and community service to create pathways to careers working with seniors:

- Encouraging the Corporation for National and Community Service to work with the Youth Worker Apprenticeship program at the Department of Labor.
- Weaving together existing national efforts on career ladder, training, workforce development, vocational education, etc.
- Promoting careers in national service that go beyond two years.
- Expanding the number of advocates for positive aging policy by reaching out to national service alumni who served in an aging-related field; strengthening the civic training provided through national service programs; creating stronger partnerships between policy and advocacy organizations and national service programs and alumni groups; and expanding leadership training opportunities for promising national service participants interested in remaining in aging-related fields.

Discussion: The group explored strategies for enlisting higher education in creating bridges between service and careers in gerontology. University leadership should promote a cross-campus emphasis, affecting areas such as architecture, social work, business, and health. Internships and scholarships would encourage students, as well as using the work-study program to give students experience in the field. Some universities, including the University of Maryland and Ohio State, group students in dormitories according to career interest such as health care. This technique should be used for senior care.

One problem is the perception that young people think that working with seniors is depressing and joyless. "Is there something structurally we have not done to build awareness?" asked David Eisner. Efforts to counteract this negative attitude need to begin in the K-12 system, such as the Points of Light high school curriculum on sensitivity to issues involving seniors. Guidance counselors should be alerting students to gerontology as a growth industry. Volunteers could serve as career counselors for high school students and partner with students on services to the elderly. One example discussed used AmeriCorps volunteers as partners with high school students in health care services and as career counselors. Equally important as a source of professionals and volunteers is the Corporation for National and Community Service, which should be more deliberate about stimulating interest in helping people live independently as a potential for long-term careers and/or service. It can be a source of best practices; if AmeriCorps

service were extended, members could earn certification that would link them to careers in the field.

People changing careers or early retirees are other sources to support seniors in independent living. Baby boomers could be drawn to the field by emphasizing the exploration and use of technology for independent living. Retirees may be looking for part-time employment that does not impact their retirement benefits. Volunteers and those receiving stipends can work together if they are well informed about the program in orientation and have well-defined roles. Using AmeriCorps volunteers side-by-side with senior volunteers may be difficult, but "the solution is to be open and to create intentional value differences" in terms of leveraging services.

No matter how they come to serving seniors in independent living, people may experience burnout. Mentoring and partnering are effective ways of dealing with burnout. There is a substantial framework developing for mentoring programs directed at children and youth, but this same interest and energy can be applied to helping seniors live independently if volunteers "see the similarities."

This discussion group recommended:

Enlist academic institutions. Careers in gerontology and independent living support need greater emphasis in campus programs like social work, but other fields should be tapped too, such as architecture and business. Creating specialized dorms, fellowships and internships, and loan forgiveness programs as well as using work-study programs - all geared to service opportunities in senior care - would expose many more young people to the possibilities of careers in this field. Universities should open the way for older, career-changers who want to specialize in this area.

Start early. Use existing curriculum on sensitivity to seniors and expand on it in high school service-learning programs. Match high school students to a senior involved in volunteer service. Educate guidance counselors to careers in this field.

Focus the Corporation for National and Community Service on independent living for seniors. A start has been made, and it is important to maintain the momentum. For example, if AmeriCorps service could be extended and result in a certification for the participant, many more participants might make a transition from their term of service into a career in senior care. The CNCS should be a laboratory for developing best practices that have a research base.

Appeal to career changers and baby boomers. Adapting technology to serve those in independent living might entice career changers or younger retirees into considering a second career or volunteering in this field.

Infuse independent living service. Tap all national and community service programs to include independent living support as a component. Focus on persuading mentors for children to apply the same structured relationship to mentors for at-home seniors. Work with business leadership to understand independent living needs, especially those of the families of employees, and encourage businesses to select this area for company service projects. Use state workforce training programs to emphasize the independent living field.

**Ramping up public
support for
volunteerism's role
in the continuum of
care**

The challenge: To meet the impending crisis in long-term care, the public and policymakers need to be made aware of the achievements of national service in helping seniors remain living independently. Evaluations of national service programs such as the Senior Companion Quality of Care Evaluation, conducted by RTI International for the Corporation for National and Community Service, demonstrate the positive impact of Senior Companions on the agencies, clients, and family members/caregivers served by the program. To make the 'business case' for national service, it is imperative to demonstrate that volunteers are a critical component of the continuum of care.

The opportunity: Volunteers can provide companionship, help with transportation and assist older persons with light chores. These activities help keep the senior independent, and having them performed by volunteers frees up professionals to provide the more costly personal care for which they are trained and licensed. National service programs are able to increase the capacity of long-term care workers such as nurses, nurses' aides and home health aides and add value to the government's investments in this area. Congress needs to be shown that investments in national service are having measurable impacts in this field.

The question: How can we best increase public awareness of the benefits of national service for keeping seniors living independently while promoting volunteer service as a product no one else in the field is providing?

Strategies: National service programs are a critical, cost-effective means of backstopping long-term care workers by providing additional services to frail seniors continuing to live at home. Engaging practitioners in this field would

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*Tennessee's Community
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Elizabeth Clemmer,
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Josie Lyons,
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Kim Mansaray,
*Corporation for National and
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John McDonald,
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Salt Lake County Aging Services

Leslie Swift-Rosenzweig,
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Rhonda Taylor,
*Corporation for National and
Community Service*

broaden the base of support for national service and help create a large advocacy network for illustrating the benefits of these programs. The following strategies have been suggested to ramp up public support for and awareness of national service volunteers as part of the continuum of care:

- Design a public relations campaign that highlights both the current crisis in independent living and the research that shows volunteerism works in this area.
- Build caregiving families as a vocal advocacy group.
- Promote collaboration and partnership among the private, public, and independent sectors.
- Promote the development of a caregiver advocacy system to give them a voice in setting policy, allocating resources, and providing the collective power needed to promote alternative solutions and change.

Discussion: The ethic of caregiving needs to be instilled early through opportunities for young people to serve the elderly, the group emphasized at the beginning. The conversation, however, quickly turned to the incentives for and barriers to service to the elderly among older persons, especially retirees. They face such barriers as age and stipend caps, avoiding taxable income, and liability issues. Programs need to be structured for a range of part-time to full-time service, with stipends reflecting this range. While stipends are important for some income groups, they are not an issue for others. Administrative burdens currently hampering service programs for seniors living independently such as inflexible hours and income caps need to be simplified and given flexibility.

Participants discussed developing a public relations strategy to convince Congress and the public of the benefits of investing in service programs for seniors. Caregiving families need to be organized as an advocacy group and/or link with existing groups such as Alzheimer family caregivers. If younger people are inspired through service to the elderly, they also can become strong advocates and carry through their interests to community colleges and universities. Promoting service to the elderly is a good public relations tool for universities, it was pointed out.

Building an interest in using service to help seniors live independently needs to be part of a larger effort to encourage civic engagement, some participants believed, but there is no lead agency or group that can do this. Cost-effectiveness data are available, "but we need a champion to make the information known to Congressional committees and other policymakers," said one participant. Advocates also need to present case studies and good examples of shifting from intervention to prevention in order to convince

policymakers. Just a few examples with data of how service prevents or delays dependent living could convince a policymaker.

Because there is no “200-pound gorilla” in this field, part of the strategy must be to link with power groups such as the health field, non-profits, labor, philanthropy, and faith-based organizations, several participants suggested. Everyone is dependent on the same pot of money, however, so this issue needs to be elevated in the public/policy arena to something equivalent to a war effort. Also, the case needs to be made to the business community that support for independent living would increase productivity of family caregivers.

This discussion group recommended:

Start early. This is a long-term strategy – one of building a familiarity with and commitment to intergenerational care. The effort should extend from K-12 initiatives into community college and university programs.

Present data and personal stories to policymakers. Research, such as the RTI International study of the Senior Companion program, should be paired with anecdotal testimony from family members benefiting from respite care and presented to Congress and other policymakers. The emphasis needs to be on cost saving – for which research currently exists; those supporting service need to find a “champion” who can make a strong case for investment in linking volunteers to the independent living field.

Extend policymaking reach. Use awareness strategies that go beyond the Congressional committee structure for the Departments of Labor and Health and Human Services to elevate independent living to a critical domestic policy issue. The effort should include other Cabinet leaders and many more members of Congress.

Develop a structure to analyze and make recommendations involving barriers to volunteer service supporting independent living. One of the issues is dealing with retired volunteers receiving a stipend but wanting to avoid having taxable income, which would become an even larger issue if the field adopts a business model incorporating for-profit providers. Other issues include liability concerns and the need for more regulatory flexibility regarding income caps and age eligibility.

Create networking among groups/interests. Use professional associations, advocacy organizations, foundations, corporations, labor, faith-based groups, and care-giving businesses to both develop public relations strategies and to bring shared issues and best approaches to the table.

**Creating alliances
between
policymakers and
programs in the
service and long-
term care fields**

The challenge: Nurses, nurses' aides and home health aides provide the majority of paid in-home care services to seniors. The tasks performed by national service volunteers are complementary to those services provided by trained, paid staff; volunteers provide companionship, help with transportation, and perform light chores. Policymakers promoting national service as part of the solution to meeting the demands for long-term care services must assure the paid professionals and paraprofessionals that volunteers supplement but do not supplant their work.

The opportunity: Paid professionals could help develop standards, qualifications and appropriate roles and boundaries for volunteers providing in-home services to frail seniors. In the coming years, the need for long-term care services will increase and there will be a greater demand for both volunteers and paid professionals. It is essential to make deliberate efforts to build symbiotic partnerships between the two types of workforces that will be needed to help seniors stay living independently.

The question: Can we do more to ensure that information is shared between national service and long-term care providers, in order for them to agree on common goals and objectives?

Strategies: The services provided by volunteers in national service programs could become even more effective with thoughtful collaboration within the aging field that ensures the complementary nature of the work. Training opportunities for volunteers, if developed in consultation with long-term care professionals

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and paraprofessionals, could have increased focus and greater impact. Suggested strategies include:

- Encourage the Senate to conduct more hearings on 'the graying of America'. In addition, identify a Congressional champion to fight for these issues.
- Work on changes to the legislation reauthorizing the Corporation for National and Community Service, adding flexibility where it is needed.
- Investigate opportunities for funding through other federal agencies in relation to their interest in the needs of seniors, e.g., HHS, HUD, Transportation and others.
- Develop a clearinghouse of information about service and long-term care and for dissemination of best practices emerging from the field.
- Continue to network and create partnerships with other service groups at the state and local level, connecting caregiver systems to volunteer resource systems.

Discussion: A primary message for Congressional and other policymakers needs to be the importance of collaboration and coordination of people and programs in the senior care field, according to the first focus of this discussion group. Joint hearings on programs for the aging held in 2003, for example, were considered a good strategy that stimulated programs to work together better. A problem, however, is that most of the support programs for the elderly are small. In order to grow, the relationship between volunteer and entrepreneurial programs needs to be improved. Too often organizations feel that they are competing against one another. Also, any great expansion of senior care programs through CNCS or any other source would present major management and monitoring challenges.

Several participants noted that private or entrepreneurial home care services should be prohibited from using volunteer servers, such as Senior Corps members, in order to save them money.

One way to minimize problems between the two sectors is for the volunteer area "to have standards that distinguish between what we do and what home health care providers do," Tess Scannell commented. Enlisting the help of professional associations and home health care agencies to establish boundaries would help "demonstrate that the need is so great, no one will lose jobs," it was pointed out.

No one with the stature of the late Senator Claude Pepper has emerged in Congress to fill his shoes as a champion of the elderly, so in lieu of a single leader, the field needs to develop a clearinghouse and assure that

independent living is a priority for CNCS and policy groups such as the National Governors Association. AmeriCorps*VISTA, for example, has encouraged its members to make a transition from service to a career in the field. Another source of support is retiring baby boomers. Better data need to be collected from current programs to establish their worth with policymakers.

While some members of Congress have been vocal about senior issues, (Senators Bayh, Harkin and Hatch, in particular), a better strategy may be to find a group of members willing to work together, especially those from states more heavily impacted by the elderly. Other ways to elevate the issue are to work with grantmaker forums and the upcoming 2005 White House Conference on the Aging. Issues should be presented to small groups of Hill staffers.

Developing career paths could borrow from the Teach for America model, although the variability in state requirements for certification would be a problem. The field needs definite standards for senior caregivers, different from professional home caregivers. Training and certification, some said, would attract retiring baby boomers, and supporters need to draw from the work of existing professional groups. Standards, training, and certification, however, should not create more barriers to volunteering, and volunteer service must be seen as complementary to regular care.

This discussion group recommended:

Evaluate opportunities in federal programs and their renewal to expand services and create flexibility. These would include the CNCS and its Senior Companion program, National Family Caregiver Program, and Administration on Aging. Encourage joint Congressional hearings on issues and programs for the aging, not only among the programs above but also regarding initiatives in the Department of Transportation and others.

Address tensions between volunteer efforts and those of paid professionals. Most communities have multiple providers of services for the elderly, but instead of fostering competition, there should be information and incentives to work cooperatively, e.g., not have private providers try to "raid" contributions of those receiving low, below-minimum-wage stipends for serving as companions. Stress that there is enough work for everyone.

Establish standards and boundaries. Volunteers and professionals need to have standards that distinguish them, and the former needs to learn from the latter about basic skills and standards. Establish a certification program

for volunteers, which might entice retiring baby boomers into the service field.

Establish a clearinghouse. This should be a cross-agency clearinghouse, perhaps housed in a current program such as CNCS or Administration on Aging (although its current Elder Care Locator program would need significant additional funding to become a full-blown clearinghouse). Currently, AoA cannot collect data on volunteers, which limits the information and stories available to justify expansion of the program.

Partner service resources with home health care agencies. Service providers need to keep costs down while expanding their reach, and more formal partnerships between agencies and national service programs could address the issue of maintaining quality services.

Find ways to develop common goals. Use such avenues as the grantmakers forum, the upcoming White House Conference on the Aging, and meetings with Congressional staff to foster discussions and consensus about the roles of volunteer care and home health care providers.

Continue building a network. There should be a continuing effort to bring together groups that can expand volunteer care services without threatening paraprofessional home health care providers and can establish certification standards and training.



Summary of Policy Recommendations

Expand the existing infrastructure supporting senior service by:

- Providing funds to volunteer support structures at the Administration on Aging and Corporation for National and Community Service (CNCS) as well as non-profit senior service initiatives to take them to scale.
- Establishing a cross-agency effort – involving the Departments of HHS, Transportation, Education, CNCS, the USA Freedom Corps, and the White House -- to support independent living, including respite care, with volunteer resources playing a prominent role.
- Creating collaboration networks among public, private, and non-profit senior service providers to address issues, share knowledge, and develop a best practices clearinghouse.
- Providing career incentives for young people (and for adults making career changes or retiring early) to enter the elder care field, addressing training and certification issues, and providing incentives to higher education institutions to use work-study programs and campus-wide programs (e.g., schools of architecture and business and career counseling) to encourage attention to independent living specialization.

Raise awareness of the looming crisis that will occur as families face the challenge of caring for growing numbers of older relatives, as well as the opportunity presented by more than 60 million Americans age 55 and over who could serve as volunteers, by:

- Assuring that volunteer support of independent living plays a large role in the preliminary activities for the White House Conference on Aging and the program itself.
- Calling for Congressional oversight hearings to focus on collaboration efforts across agencies that promote independent living and the role of the volunteer sector.

Analyze and act to remove barriers to expanding volunteer support for helping seniors remain independent by:

- Removing the income cap on persons who work in the Senior Companion Program.
- Filling the need for service standards and systems for verifying volunteer qualifications.
- Addressing policy issues regarding employment versus paid volunteering and potential management-labor relations issues.
- Encouraging senior companion program services as eligible services under the Medicaid Elderly Waiver program, and removing barriers to other fee for service opportunities for senior service programs.

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