



AGE4ACTION

NETWORK



Modernizing the Older Americans Act

Recommendations for the 112th Congress



WORK • SERVE • LEARN • LEAD

Mission

Age4Action engages, informs, connects and mobilizes organizations and networks to increase opportunities for Americans age 50+ to work, serve, learn, and lead in their own communities.

Vision

Our vision is that people age 50+ will strengthen society and improve the quality of life in their communities through their active engagement and valuable contributions as:

- dynamic advocates for sound public policies,
- valued workers contributing to the local well-being,
- committed volunteers in support of worthwhile community programs,
- respected leaders in their communities, and as
- lifelong learners continuing to develop their knowledge and experience.

What We Believe

- We believe individuals age 50+ have immense talents, expertise, and experience and want to work for their own well-being and for the benefit of the common good. Through their work, individuals age 50+ will help to fill gaps in our society and contribute to a stronger economy.
- We believe that individuals age 50+ are a mainstay in America's long tradition of service and volunteering and they must be encouraged and supported in engaging more fully to improve communities and address some of our nation's pressing social challenges.
- We believe that individuals age 50+ are seeking and creating expanded opportunities for lifelong learning that unleash their potential as teachers and learners, and support their continued productivity and personal enrichment.
- We believe that individuals age 50+ offer a wealth of wisdom and experience that allows them to be catalytic leaders in confronting the major challenges of our times.





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**The Age4Action Network is funded
in large part through the generosity of**

The Atlantic Philanthropies

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Age4Action Network thanks the following organizations for their support in pursuit of our mission:

AARP Foundation Senior Employment Program

AARP Pennsylvania

American Association of People with Disabilities

Amherst H. Wilder Foundation

Asociacion Nacional Pro Personas Mayores (National Association for Hispanic Elderly)

Association of Retirement Organizations in Higher Education

California Council on Gerontology and Geriatrics

Coming of Age

Community Experience Partnership Council on Adult and Experiential Learning

CSU Long Beach

Experience Corps

Experience Wave

The Gephardt Institute

George Warren Brown School of Social Work at Washington University

The Gerontological Society of America

Health and Work Jewish Employment and Vocational Services

Heritage Senior Facility

ITNGreaterLA™

Los Angeles Caregiver Resource Center

Los Angeles Department of Aging

Marta Sotomayor

Matz, Blancato, and Associates

McCormack Baron Ragan

MERS/Goodwill

MidEast Area Agency on Aging

Minnesota Board on Aging

Minnesota Department of Human Services

Minnesota Senior Companions Program

Monsanto YMCA

National Association of Nutrition and Aging Services Programs

National Caucus and Center on Black Aged

National Civic League

National Council on Aging

The OASIS Institute

Osher Lifelong Learning Institute at Temple University

Orleans Technical Institute

Pacific Region OASIS

Partnership for Public Service

Portland Community College Sylvana Campus

Rebuilding Together Pasadena

Rose Community Foundation

Senior Service America

Senior Community Service Employment Program

St. Barnabas Senior Services

St. Louis Area Agency on Aging

St. Louis Community College

Southeast Asia Resource Action Center

Twin Cities Public Television

UC Berkeley Retirement Center

Union for Reform Judaism

U.S. Administration on Aging

USC Davis School of Gerontology

USC Emeriti Center College

Vital Aging Network

VolunteerMatch

Warwick Denver Hotel

Widener University

WISE and Healthy Aging

The Age4Action Network Steering Committee members listed in bold.

Acknowledgements

The Age4Action Network acknowledges the dedicated individuals and groups whose work and support made the Forums and this report possible:

Special thanks to Dani Kaiserman, GSA, and Libby Stegger, Experience Wave, for their work organizing the Forums, developing the survey, and drafting the report.

Thanks to the leadership team of Greg O’Neill, GSA, and Brian Lindberg, Experience Wave, whose vision and guidance made this project possible, and to Sabrina Reilly, Marci Phillips, Michelle Rodriguez, and Tracy Compton of NCOA for their many contributions throughout the project.

Former Senator Harris Wofford played numerous important roles, including Forum moderator, historian, and inspirational leader for the project.

The Age4Action Network Coordinating Council, Thomas Goodwin Communications, Alan Lopatin, and Laurie Lindberg, for providing invaluable editorial input.

We greatly appreciate the expertise in survey design of Nancy Morrow-Howell, Ernest Gonzales, and Jennifer Greenfield of the George Warren Brown School of Social Work at Washington University in St. Louis.



St. Louis residents gather at the Monsanto YMCA to engage in a dialogue about volunteerism and work among adults age 50+

Appreciation to Minnesota Governor Tim Pawlenty, for supporting the engagement of older Americans; Former U.S. House Minority Leader Richard Gephardt, for dedicating his time to our mission and promoting public service; and Former U.S. Representative Tim Penny, for advancing the future of leadership and service in the Older Americans Act.

Thanks to A. Jill Wagner, IconoGraph Designs for the design and layout of the report.

Our local partners made it all possible by contributing time and resources to organizing the six Older Americans Act Idea Forums:

Las Vegas, NV

Pam Carlson and Bob Blancato,
NANASP

Philadelphia, PA

Dick Goldberg, *Coming of Age*
Adam Brunner, Osher Lifelong Learning
Institute at Temple University
Phyllis Snyder, CAEL

St. Paul, MN

Mark Skeie and Tom Hyder, Vital Aging
Network
Julie Roles, J Roles & Associates

Denver, CO

Sarah Christian, VolunteerMatch
Phil Nash, Chandra Al-Khafahi, and
Therese Ellery, Rose Community
Foundation
Derek Okubo, National Civic League
Margaret Roberts, Communications
Consultant

St. Louis, MO

Marcia Kerz and Mary Baskerville,
OASIS
Nancy Morrow-Howell, Ernest Gonzales,
and Jennifer Greenfield, George Warren
Brown School of Social Work at
Washington University
Robin Hattori and Amanda Moore
McBride, Gephardt Institute for
Public Service

Los Angeles, CA

Maria Henke, Jon Pynoos, Greg
Misiaszek, and Emily Nabors,
University of Southern California
Davis School of Gerontology

Finally, thanks to all the Older Americans Act Idea Forum attendees whose stories and recommendations fill this report and testify to the value of older adults working and serving in their communities.

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The purpose of this white paper is to inform Members of Congress of Age4Action’s recommendations for improvements to the Older Americans Act and to summarize the comments made at six community forums around the country. Age4Action aims to enhance opportunities for adults age 50+ to work, serve, learn, and lead.

Members of Congress will find Age4Action’s Older Americans Act recommendations in the second chapter of this white paper.

Introduction

Across the nation, thousands of Americans age 50+ are challenging the traditional idea of a quiet retirement and are pursuing active engagement in their communities.

- They extend their **work** life in both paid and unpaid positions;
- They **serve** as volunteers and bring about social change;
- They continue to **learn** through educational and job training programs; and
- They **lead** through involved and engaged citizenship.

In so doing they understand that their own lives as well as the lives of those around them are enriched and enhanced and that important cultural and generational bonds are identified, leveraged, and strengthened.

They understand that there is much more to aging than “retirement,” and so do we.

The Age4Action Network is a national movement of organizations that share a common belief in a powerful premise: there is tremendous societal value in providing incentives, opportunities, and encouragement so that Americans age 50+ can be actively engaged in their communities. Our goal is to **rewrite the narrative of aging** in American society for current generations of people 50+ and those who follow. We believe this trans-

formation will take place on four fronts: employment, community service, lifelong learning, and leadership. What we hope to accomplish is threefold:

- a society that embraces the human potential of older adults to make meaningful, productive contributions to society and the economy in their 50s, 60s, 70s, 80s and beyond;
- an aging population that recognizes its own potential to work, serve, learn, and lead in the increasingly uncertain context of economic, social, technological, and global change; and
- a society with greater opportunity, economic security, and social justice for all generations.

Members of the Age4Action Network are connected with like-minded leaders, informed about best practices in engaging adults age 50+, and have influence on critical legislation and funding opportunities for older Americans.

Together we can reinvent traditional notions of aging and retirement into a new narrative defined by four essential values:

WORK: Whether paid or unpaid, adults age 50+ enjoy more purposeful and healthy lives when they are contributing to their communities.

SERVE: Americans age 50+ offer a tremendous resource of knowledge and experience to younger people, through mentoring and teaching, and volunteering.

LEARN: Studies have established that lifelong learning instills a healthy sense of purpose and community engagement as Americans age. Thousands of older people return to school to audit classes and earn degrees, learn new job skills, or join local organizations interested in dynamic information sharing.

LEAD: Age4Action Network members recognize that Americans age 50+ are an invaluable national asset. When people age 50+ give back to their communities, they become more than simply the recipients of aging services. That’s why we encourage them to lead in their communities and to become advocates for increased public engagement to solve society’s greatest challenges.

Why is this Important Now?

More than 77 million adults—more than at any other time in America’s history—are reaching their 50s and 60s in better health and with more financial security and education than any previous generation. They want to work, serve, learn, and lead. Their talent, time, and energy are needed by our communities, our economy, and by future generations. These contributions are well understood and recognized for their successes, but until now there has been no coordinated effort to maximize the potential of these adults.

The Age4Action Network was formed to help *reinvent retirement*. The Network is comprised of organizations working in the field that have the expertise, resources, and passion to energize and stimulate adults age 50+ to work, serve, learn, and lead. Yet because many of these groups typically work in isolation, their good work is necessarily limited. The Age4Action Network brings these organizations together to mobilize fully the human assets of people age 50+ for the common good.

How Will We Accomplish Our Mission?

The Age4Action Network captures the strengths of a broad base of diverse organizations working throughout the U.S. to develop new approaches to age 50+ civic engagement. The Network’s charge is to:

- advocate for improvements in public policy and in the private sector that remove barriers and help unleash the potential of older Americans to contribute and to thrive;
- amplify the collective voice of organizations working to solve the most pressing problems in our communities, our nation, and our world by leveraging the knowledge, talents, and resources of people age 50+;
- champion new ideas and initiatives that tap the potential of all people age 50+ to making meaningful contributions to society; and
- seize the opportunity presented by the aging of the baby boom generation to challenge and reshape societal norms around aging.

Executive Summary

The Opportunity to Modernize and Reinvigorate an Essential Law

Since 1965, the Older Americans Act (OAA) has protected the well-being of adults age 50+ through targeted services, training, and research. Older Americans Act programs provide critical support for nutrition, job training, family caregiving, community service, and protection for those in long-term care facilities. The Act's foundation is the belief that American society overall benefits from an older population that is active, healthy, informed, and financially secure.

The law's scheduled reauthorization creates a timely opportunity for Congress to modernize aging services for a generation of adults age 50+ who want to work, serve, learn, and lead in their communities.

Creating New Opportunities for Americans 50+ to Serve Their Communities

In 2006, the OAA was amended to begin to address the unmet needs of a generation age 50+ who wanted to redefine retirement by continuing to work, serve, learn, and lead. Today the law encourages the aging network to use trained volunteers to provide direct services and to create opportunities for adults age 50+ to remain actively engaged in their communities. The OAA reauthorization process offers an opportunity to modernize and improve the OAA's work, service, learning, and leadership provisions.

Idea Forums Yield Important Findings, Promising Ideas

In an effort to explore the extent to which a revitalized OAA can help meet the needs and challenges of the 21st Century presented by a large population age 50+, Age4Action conducted a nationwide fact-finding and listening initiative in which it held a series of Idea Forums in six U.S. cities. The goal of these community dialogues was to learn from Americans outside the Capitol Beltway how the Age4Action Network can play a leading role in improving OAA provisions for adults age 50+ who want to improve the quality of life in their communities through contributions as dynamic advocates, valued workers, committed volunteers, lifelong learners, and respected leaders.

These Forums brought together adults age 50+, professionals from the aging services network, community leaders, and elected officials to translate their experiences and expertise into ideas for OAA reauthorization. The Forums drew more than 700 participants and produced many important findings and promising ideas from testimonies, presentations, and discussion groups. A survey seeking input on existing barriers to work, service, learning, and leading was given to all Forum attendees; it resulted in meaningful statistical data, which, taken together with the Forum proceedings, ultimately produced the recommendations in this report.

OAA Recommendations: How to Increase Opportunities to Work, Serve, Learn, and Lead

After much dialogue and careful analysis, the Age4Action Network will focus its attention and resources on supporting several changes to the OAA to be incorporated into the reauthorization bill. These recommendations and the findings that support them are found in this report. A summary of Age4Action’s OAA recommendations follows:

Develop a National Strategy

The Administration on Aging and the Corporation for National and Community Service are national leaders in promoting service among adults age 50+. Age4Action seeks ways to support their ongoing efforts and encourage them to work together to share resources with the aging network and create a national strategy for service among adults age 50+. This strategy should include enhancing research and evidence-based practices and calling on community-based agencies to work together in partnership to support the national strategy.

Recommendation 1: Integrate into the Administration on Aging’s formal charges the currently authorized civic engagement resource center by moving the resource center from Title IV to Title II of the Older Americans Act. Authorize the Administration on Aging, the Corporation for National and Community Service, and the federal agency administering the Senior Community Service Employment Program (SCSEP) to work together to create a national strategy to tap older

volunteers as a source of social capital to meet critical community needs.

Recommendation 2: Authorize and fund projects for qualified institutions to collect and analyze data on the impact of work, service, learning, and leading on both the clients and communities receiving service, as well as on the adults 50+ providing service.

Recommendation 3: Enhance volunteer and SCSEP referral resources at Area Agencies on Aging.

Strengthen the Capacity of Older Workers

Americans are living longer and healthier lives than ever before. Many need and want to continue to work. They can continue to contribute to American society and the economy but need the training and skills to do so effectively as they adjust to a changing market and new technologies. The lack of sufficient technology skills and shortage of quality programs aimed at teaching adults age 50+ how to use computers in the workforce remains a problem for adults age 50+. Additionally, job training and placement programs should be given the tools to measure effectively their progress and, in turn, to best serve the needs of older workers.

Recommendation 4: Enhance quality technology training opportunities for SCSEP participants.

Recommendation 5: Allow SCSEP programs to include elder abuse prevention and volunteer support for the State Long-Term Care Ombudsman Programs.

Recommendation 6: Modify SCSEP program measures to account for durational exits.

Promote Sustainable Volunteering

Adults age 50+ are active, passionate members of society. They want to make positive, meaningful contributions to their communities. The OAA should support volunteers and community-based organizations by improving the coordination and delivery of services under the Act and maximizing the impact of volunteers. Doing so will better harness the time, talents, and experiences of volunteers age 50+ who strengthen communities and address critical social needs.

Recommendation 7: In order to increase the number of volunteers age 50+ and to improve volunteer retention, target resources towards establishing volunteer management programs that will train and place volunteer managers who are age 50+ in Area Agencies on Aging, senior centers, or other community-based organizations.

Recommendation 8: Make safety and liability measures such as driver's license checks and criminal background checks an allowable use of funds under Title III.

Recommendation 9: Include in the programs overseen by the Administration on Aging a targeted focus on preventing elder abuse, promoting elder justice, and providing services to victims of elder abuse.

The Way Forward

Now is the time to build upon the excitement and ideas generated at the Idea Forums and take action to increase opportunities for adults age 50+ to work, serve, learn, and lead in their communities. We must make the most of the OAA reauthorization as a chance to improve society and strengthen communities through the active engagement of individuals age 50+.

To view the complete report of our findings and recommendations, please visit www.age4action.org.

A message from Kathy Greenlee, U.S. Assistant Secretary for Aging

With its mandate to serve all older Americans, the OAA has kept millions of older Americans healthy, independent, secure, and able to live at home for as long as possible. And since its enactment, the OAA has grown and adapted to many of our nation's changing needs. The reauthorization of the OAA in 2011 coincides with the first of our nation's baby boomers turning 65. I believe the reauthorization presents a pivotal opportunity for us. We can build the next generation of programs and leaders in order to serve an increasingly healthy, diverse, and aging America. The question before us in 2011 is:

How can we make the OAA work better—for today's older Americans, for baby boomers, and for the nation?

Adapted from NCOA's Innovations Spring 2010: Big Ideas for the OAA

Findings

This chapter encompasses ideas from individuals and communities who shared their concerns and solutions for engaging adults age 50+ in work, service, learning, and leadership during one of six Older Americans Act Idea Forums held across the country in 2010. Their ideas have shaped Age4Action’s legislative recommendations for the Older Americans Act reauthorization; these legislative recommendations will be addressed in the next chapter. This chapter focuses on the concerns and ideas of real people across the country who believe as we do that adults age 50+ are a valued asset to this nation and deserve opportunities to be committed volunteers, valued workers, dynamic advocates, and lifelong learners.

Work

Whether paid or unpaid, many Americans age 50+ enjoy more purposeful and healthy lives when they are contributing to their communities. Most adults age 50+ must work to ensure greater economic security. New approaches to employing adults in flexible work arrangements, as well as innovative models for streamlining the transition between work and retirement, will help secure the economic future of older generations and mobilize their talents to benefit their communities.

Capitalizing on Workplace Flexibility

As America’s population ages, more adults will leave the workforce permanently, and others will be forced into temporary leave for caregiving responsibilities. Forum attendees were vocal about meeting the needs of employers and employees in this changing dynamic.

Denver Forum attendees noted that instead of a rapid shift into full-time

retirement, many adults age 50+ want to keep working but face physical limitations. Many are interested in a gradual phase out leading to full or partial retirement.

Additionally, the Forum survey indicated that 24 percent of participants described caregiving as a barrier to working, and 58 percent of respondents knew of someone for whom caregiving was a barrier. Dr. Donna Benton, director of the Los Angeles Caregiving Resource Center and a participant in the Los Angeles Forum, suggested collaborating with employers to provide caregiving resources and training to employees.

“Our Boomers are active, different, usual and unusual people. We stopped a war, we can learn to address these issues.”

To address these issues, Forum attendees recommended flexible work schedules as a potential way to address the needs of older workers. This may consist of reducing work hours or moving into mentoring, training, or consulting roles. Nontraditional work arrangements such as job sharing, reduced work hours, and temporary leave help individuals age 50+ work longer and adapt to changing physical and personal needs. Flexible work policies especially appeal to older workers who express interest in challenging the conventional idea of retirement.

In addition to benefitting employees, flexible work schedules provide incentives for employers and the nation as a whole. Employers benefit from a smooth transfer of expertise, and the nation benefits by allowing adults age 50+ the flexibility to voluntarily work past traditional retirement age, with the potential to continue to pay taxes and delay using Social Security benefits.

Ageism Depletes Human Capital

The single biggest barrier to employment for adults age 50+ that Forum participants discussed was age discrimination. Adults age 50+ in the United States are often the first to be laid off and the last to be rehired.ⁱ Unfounded presumptions that older workers are more difficult to train, demand higher salaries, and have higher benefit costs cause employers to overlook the value of lifetime work experience offered by so many workers age 50+. Among survey respondents age 50+, 54 percent knew of someone who encountered age discrimination as a barrier to work. To combat age discrimination

for workers age 50+, participants recommended solutions including media outreach and employer education about the value of older workers.

Challenging Conventional Wisdom

Adults age 50+ are redefining retirement. Many adults want to continue to work part-time or be actively involved in their communities through service or learning. Upon leaving the full-time workforce, they do not know what opportunities are available. Pre-retirement is an opportune time for employers to share opportunities that are available to individuals exiting the workforce, such as part-time jobs or mentoring activities. In turn, employers can harness the knowledge and skills of these retiring employees by informing them of ongoing transitional and employment opportunities that benefit the industry or firm.

At the Philadelphia Forum, participants discussed reaching out to employers as the information dispensers for individuals transitioning to the next phase. In St. Paul, one Forum participant discussed how the retirement training programs led by the National Active and Retired Federal Employees Association (NARFE) served as a prime opportunity to provide information about opportunities for ongoing community engagement following retirement. Information can be shared with employees through pre-retirement seminars or one-on-one information sessions.

With appropriate training of employers, employees could leave one stage of their work life better prepared

for a future of ongoing community engagement. Helping employees to answer the question of “What’s next?” may include introducing the idea of “encore” opportunities, where seasoned professionals can receive training to transition into the nonprofit sector. Especially for individuals who may need income support after retirement or those interested in taking on a new role, “encore careers” can provide necessary compensation and personal fulfillment. Participants also offered creative approaches for transitional opportunities, such as schools hiring former technical workers to teach their trade.

At the Philadelphia forum, Dr. Carolyn Walter, counselor, author, and Professor Emerita, shared her ideas regarding the importance of providing resources for those in transition. She ignited a lively conversation among Philadelphia attendees about the emotional, financial, and intellectual needs of those transitioning from work to the next phase. Dr. Walter advocates for a Center for Life Transitions, which would offer individual and group resources to adults age 50+ experiencing a life change.

Engaging the Older Workforce: The Senior Community Service Employment Act (SCSEP)

Title V of the Older Americans Act authorizes a program called the Senior Community Service Employment Program (SCSEP). Currently overseen by the Department of Labor,ⁱⁱ SCSEP places low-income adults age 55 and older in jobs focused on serving community needs, pays them a moderate wage for

their work, and provides them with job training in order to help them move into unsubsidized employment.

Participants and administrators involved in SCSEP presented at the Forums and universally praised the SCSEP’s twofold mission to (a) provide needed services in local communities and (b) train participants for future unsubsidized employment. However, several participants at the Forum in St. Louis discussed the challenges of preparing participants for unsubsidized employment. Don Vaisvil, director of a Title V program with MERS Goodwill in St. Louis, explained that it is difficult at times for SCSEP staff to “increase the skills of a Title V participant to a competitively employable level” given that some participants face barriers such as low-education levels.

Ernest Gonzales, a doctoral student at the Brown School of Social Work, echoed these concerns and provided a recommendation: “A solution is to increase participants’ reading, writing, and math comprehension levels. The first step is to assess their skills and place them in an appropriate training class. Once the foundational skills have been assessed and improved, then participants can gain additional training with technology, i.e. computer software, internet, telephones, faxes, professional communication and conduct, and with working with customers and in stressful environments.”

Forum participants also emphasized the importance of SCSEP remaining a program in which seniors work in a community service capacity. In Las Vegas,

one Forum attendee shared the idea of using SCSEP participants to work as advocates on elder justice issues. SCSEP workers could assist long-term care ombudsman programs and other agencies in preventing abuse and exploitation of older Americans. As advocates for residents of nursing homes, board and

“Volunteer opportunities need to be meaningful and well organized—a good use of volunteer’s time and energy.”

care homes, and assisted living facilities, long-term care ombudsman programs work to ensure quality care in these

settings. For example, State Long-Term Care Ombudsman Programs, which were created by the Older Americans Act, rely on volunteers to assist with management of excessive case loads. A formal partnership would allow for standardized training and a reliable set of volunteers to help the ombudsman programs fulfill their responsibilities.

Although the idea for Title V workers to serve as elder justice advocates was unique to the Las Vegas Forum, all of the Forums yielded enthusiasm and ideas around the concept of “seniors helping seniors.” SCSEP participants working to further the mission of elder justice

promotes this goal, as well as the original intention of SCSEP workers to be placed in community service roles.

Forum participants also raised issues concerning the limits on SCSEP participation terms. Several audience members explained how those currently employed through SCSEP would benefit from extending or eliminating term limits that restrict the number of years participants may be enrolled. Testimony from SCSEP participants indicated that although they have benefited from the program, for many, unsubsidized employment is not a realistic possibility. In this struggling economy it will be especially difficult for many participants to find unsubsidized employment before the end of their participation term limits. Therefore, failure to extend or remove these limits may leave some SCSEP participants in financially vulnerable positions.

As a result of the durational term limits, new challenges have emerged in measuring SCSEP accurately. Concerns were raised that current measurement tools do not appropriately reflect program performance. Ways to address this issue are described in more detail in the next chapter.

Serve

Baby Boomers are the most engaged generation in America.ⁱⁱⁱ Communities

“At a time when senior programs are under attack, the need to create and build a senior movement that actually includes seniors themselves is essential. The slogan ‘nothing about us without us’ comes to mind as an absolutely necessary feature of this new movement. Seniors must be involved in helping to solve the problems that plague our country.”

—Marvin Schachter, Los Angeles, CA

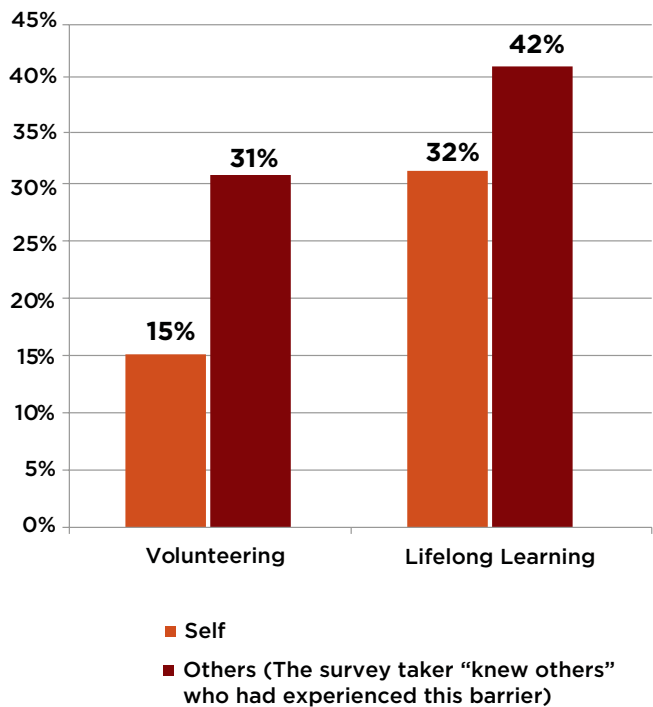
rely on volunteers age 50+, and these volunteers benefit from the healthy, active lifestyle that volunteering helps them maintain. The Forum survey reaffirmed the high percentage of volunteers among adults age 50+, finding 82 percent of survey respondents age 50+ volunteering formally and 76 percent of respondents 50+ volunteering informally.^{iv} Several older volunteers attending the Forums shared their positive experiences with service, as well as suggestions for improving the system.

Maximize Your Return on Investment

Volunteering is not free. Though volunteers are unpaid, their mobilization and success requires a substantial initial investment. It is costly to recruit, train, and manage volunteers. When organizations invest in volunteers, however, they receive a large return, estimated at 8:1.^v

Although volunteers are valuable assets, many organizations struggle to afford the upfront investment. The upfront cost of engaging volunteers is the first barrier. Organizations often must pay for risk management, drivers license checks, and criminal background checks. In St. Paul, Forum participants suggested reimbursing organizations for these direct costs. While there is no law mandating background checks for volunteers, many organizations require them, especially if the volunteer interacts with vulnerable age groups or sensitive issues. Assisting with the front-end financial investments for volunteers reduces the burden on organizations, making it easier to utilize volunteers.

Cost as a Barrier to Volunteering and Lifelong Learning among Survey Respondents Age 50+



Recruitment and retention are two additional barriers nonprofits face in maximizing the return on investment in volunteers. High volunteer turnover is pervasive and expensive. One reason for high turnover is that many volunteers lack the training and oversight to take on meaningful tasks for the organization. Training and oversight responsibilities typically fall to a volunteer manager, a position that is often underfunded, part-time, or nonexistent. Forum participants emphasized the need for volunteer managers in order to create meaningful volunteer opportunities that will help organizations recruit and retain volunteers.

In Denver, Forum participants shared examples of how volunteer coordinators could assist in creating meaningful volunteer roles. Examples of meaningful roles included adults age 50+ pursuing opportunities as public policy advocates and health care system navigators. Such volunteer positions utilize the volunteers' skills and place age 50+ volunteers in leadership positions.

Dr. Nancy Morrow-Howell, professor at the Brown School of Social Work at Washington University in St. Louis and a leading researcher in civic engagement, described the difficulty in balancing volunteer capabilities with an organization's needs: "Our challenge is to figure out how to maximize the talents and satisfy the expectation of volunteers; but at the same time we must figure out how to meet the demand for the basic work of our agencies." In order to combine substantive assignments with traditional volunteer responsibilities, training of staff and volunteer coordinators is essential. A Forum attendee in Las Vegas added, "Volunteer opportunities need to be meaningful and well organized so that they are a good use of volunteers' time and energy."

Although volunteer managers and coordinators are extremely valuable investments, recruitment and training costs can deter organizations. Agencies need incentives to make the high-cost upfront investment. Las Vegas Forum participant Elaine Brovont, Executive Director at Midland Meals, Inc., suggested rewarding agencies that recruit age 65+ volunteers, including providing monetary

funding based on the number of recorded volunteer hours among this cohort.

We also learned from participants that training for volunteer managers and staff enhances organizations' volunteer activities. More than 25 percent of survey respondents reported that disorganized volunteer opportunities served as a barrier to volunteering. When organizations are under-staffed, managing volunteers can often seem like more of a burden than an asset. Forum participants in St. Paul cited the Minnesota Association for Volunteer Administration (MAVA) as a success story in volunteer coordination. MAVA provides resources, support, and training for leaders that oversee volunteers. This initiative is just one example of a group promoting a solution to the issue of ineffective volunteer management.

Incentives for Volunteers

Volunteers themselves often pay out of pocket for transportation and time away from paid work. Many Forum participants proposed solutions to incentivize volunteering. First, stipends can supplement costs associated with volunteering such as transportation, and can provide a

"These participants suggested a "currency exchange" where volunteers could choose from benefits, including healthcare coverage, transportation, or lifelong learning credits in exchange for volunteer hours."

safety net for those who need it. While 31 percent of surveyed adults age 50+ knew others who experienced cost as a barrier for volunteering, however, only 7 percent of survey respondents 50+ who engaged in either formal or informal volunteering received some form of pay or stipend.

Forum participants also discussed the importance of alternative benefits for volunteers. In particular, attendees described the need for flexibility and transferability of health insurance, particularly for volunteers age 50+. Denver Forum participants discussed how rising health care costs made it too difficult to leave a full-time work position and begin volunteering regularly because so many adults depend on the benefits provided by their employer.

In response, participants suggested a version of a “currency exchange” where volunteers could choose from benefits, including healthcare coverage, transportation, or lifelong learning credits in exchange for volunteer hours. This type of exchange is similar to time banking in which participants give their time while they are physically and mentally able to volunteer and then trade in these credited hours for goods and services when they need them.

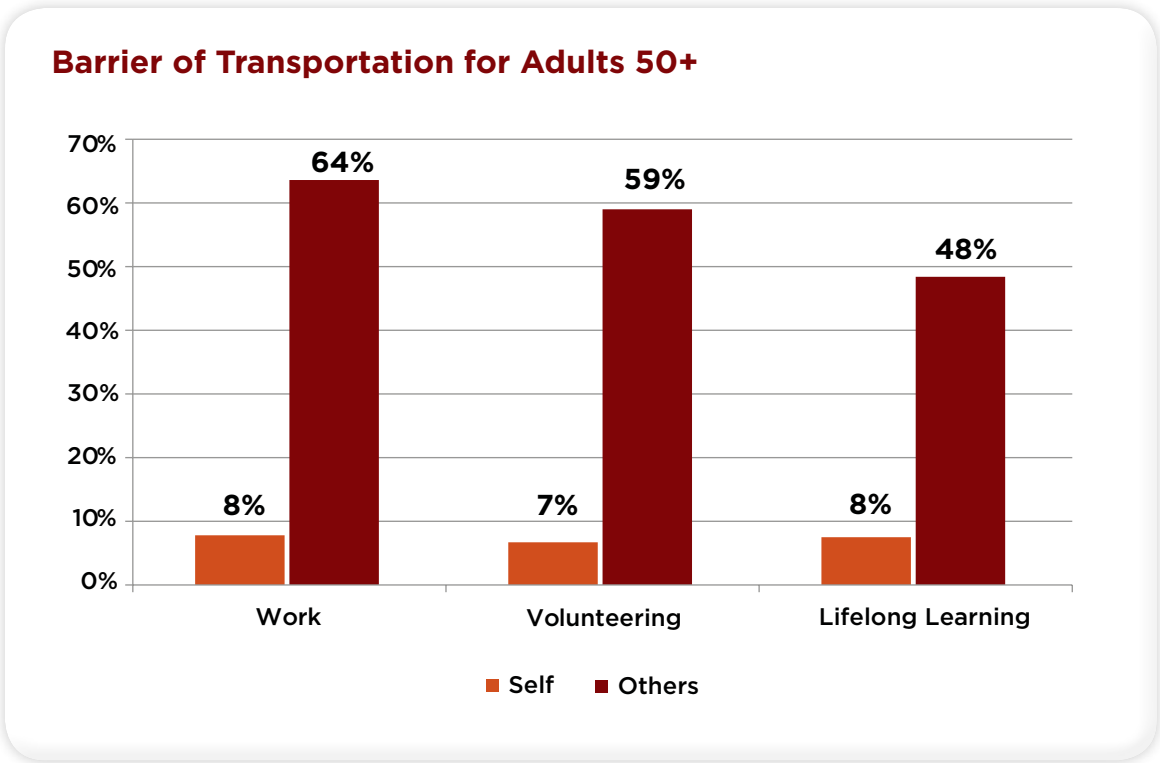
In addition to direct stipends and currency exchanges, tax incentives are another way to provide financial relief to volunteers. Volunteer tax incentives do exist, but none of these allow tax breaks based on volunteer hours served. Instead, legislation permits tax deductions for nonprofit donations and direct costs associated with volunteering, such as gas for transportation and volunteer uniforms.

“To achieve the highest ROI, agencies must fully leverage the skills of volunteers by giving them responsibilities that meet their talents.”

Forum attendees described the challenges of finding accessible, affordable, and reliable transportation to and from work and volunteering activities. Among Forum survey respondents age 50+, 59 percent knew someone who experienced transportation as a barrier to volunteering. Executive Director of the St. Louis Area Agency on Aging, David Sykora, said, “Transportation is a major obstacle. Many of the persons who enthusiastically call us to volunteer do not have reliable transportation to get to the locations that we need them to be at.” Age4Action recognizes the importance of transportation as an essential element that supports the ability of adults age 50+ to work, serve, learn, and lead, and supports programs to improve access to such services.

Build on Success: Strengthen Existing Volunteer Programs

In addition to brainstorming new ideas for incorporating opportunities to work, serve, learn, and lead into the Older Americans Act reauthorization, Forum participants voiced interest in expanding current initiatives. They praised the intergenerational approach to volunteering through the Foster Grandparent Program and asked for more programs to include multi-generational components to volunteering. Other programs, such as



AmeriCorps, the Peace Corps, RSVP, and Senior Companions were also named as strong programs that should continue to receive support.

Learn

Lifelong learning is critical for adults age 50+ to help them remain active and economically self-sufficient. Job and technology training programs help adults age 50+ keep pace with a changing economy. The economic downturn has increased demand for job transition programs among adults age 50+ who were laid off or forced into early retirement and who wanted or needed to continue working. Lifelong education helps build stronger communities by getting individuals involved in local programs and by helping them obtain necessary skills to learn and succeed.

Workforce and Personal Development: Education as the Key to Success

Adults age 50+ choose to engage in lifelong learning to train for a new career, to enrich their lives, and to develop skills for personal growth. According to our survey, a significant number of adults age 50+ want to take classes. Their specific interests vary greatly. Over half of adults age 50+ surveyed expressed interest in taking classes aimed at technology training, health and wellness, and the arts.

In particular, 52 percent of surveyed adults age 50+ had an interest in learning computer skills that can lead to social engagement through the Internet. Many Forum participants requested technology classes beyond the basics so they can fully utilize the Internet as a powerful

communication and educational tool. Technology training classes are in high demand and hold a great deal of potential to improve technology skills as a means of staying up to date with the fast evolving technologies for both business and personal use.

In order to make educational opportunities accessible for all adults age 50+, individuals with disabilities must be included in the conversation. In St. Paul, Carol Daly, former director for Minnesota Elderhostel, discussed the need for assistive technology devices for those with hearing impairments. Daly recommended installing closed captioning and audio enhancement devices in educational settings so that all adults age 50+ can engage in lifelong learning, regardless of disability.

Of those surveyed who are age 50+, 84 percent have participated in lifelong learning programs over the past five years. Yet, even given the high percentage of individuals participating in lifelong learning, 32 percent of survey respondents felt cost served as a barrier to



Mildred Boyd tells the audience about the job readiness program for adults that she organizes at the Monsanto YMCA

“Outreach to recently retired individuals with an offer to match their skills and interests with public service needs would be great.”

their involvement in lifelong learning and education programs.

Many community colleges, private universities, lifelong learning centers, and local senior facilities offer free and low-cost educational opportunities. Spreading awareness about these programs, especially in low-income and minority communities, is important to promote staying active through education.

Another established idea to reduce the financial burden of lifelong learning is to offer education tax credits such as Lifelong Learning Accounts (LiLAs). LiLAs allow individuals to create tax-exempt accounts to save for tuition and other education fees. Since 2007, bills have been introduced in Congress to authorize these accounts, but no action has yet been taken. Age4Action supports this plan to reduce costs for those seeking educational classes as a tool for career transitions and training.

Finally, educational awards such as the Silver Scholarship and Encore Fellowship programs authorized in the Edward M. Kennedy Serve America Act are innovative, effective ways of engaging adults in serving their communities and promoting lifelong learning across generations. Age4Action supports lifelong learning and continues to advocate for full funding of these programs.



Former Senator Harris Wofford delivers a passionate speech about engaging all citizens in service

Cultural Competency: Addressing the Needs of Caregivers

Caregiving has an impact on all generations. Caregivers or recipients of care are all affected by the heavy demands of aging. As a cross-cutting issue affecting the ability to work, serve, learn, and lead, caregiving constitutes an important element in any discussion of civic engagement in the Older Americans Act. As noted at the Los Angeles Forum, caregiver training is crucial and must address the needs of minority communities and immigrant populations. Jonathan Tran, California Policy Advocate for the Southeast Asia Resource Center, highlighted the “importance of culturally competent caregivers who can more accurately diagnose issues faced by their patients who may be uncomfortable or unable to communicate their ailments.” Given differences in language, customs, and social norms, those providing caregiver training must be sensitive to and inclusive of community needs.

The Older Americans Act currently includes provisions for State and Community grants under Title III, through which the National Family Caregiver Support Program allocates some grant funding towards training caregivers and their families. Title III funds should support lifelong learning, particularly for caregiver training.

Lead

Adults age 50+ have experiences and expertise to serve as role models for younger generations and address today’s challenges. Across the country, leaders age 50+ are serving their communities and inspiring positive changes. In Denver, the Rose Community Foundation’s *Boomers Leading Change* initiative trains adults age 50+ to help other seniors navigate the new health care legislation. In Philadelphia and across the nation, seniors are mentoring and tutoring students as part of Experience Corps. Adults age 50+ are leaders and innovators, and their talents should be recognized and utilized for the common good.

Active Roles for National Leadership

In addition to acting as local community leaders and role models, Forum participants proposed an initiative to train adults age 50+ as public policy advocates. Participants suggested establishing a senior internship or fellowship program in the public sector, which would give adults age 50+ a direct role in informing discussion and debate in public policy. With a lifetime of experiences, adults age 50+ can contribute valuable insight to

help policymakers and elected officials make meaningful policy changes. Advocates themselves would also benefit from this opportunity to serve as leaders by learning new skills and receiving all of the health and psychological benefits of active engagement.

The Vision of Dynamic Leaders

Shifting the public perception of adults age 50+ remains one of the greatest hurdles in viewing these individuals as leaders. With the media and other sources often focused on images and stories about older adults as dependent and inactive, public images of adults age 50+ working, serving, learning, and leading are difficult to find. Denver Forum participants noted the public stigma attached to individuals age 50+ and suggested an outreach campaign to mirror the diversity of interests and abilities of this population.

Summary of Findings: A Commitment to Community Engagement

Drawing on expertise from experienced service providers and adults age 50+ themselves, the Forums yielded innovative ideas for work, service, lifelong learning, and leadership in the Older Americans Act. While Forum participants shared a broad range of experiences and comments, several important themes emerged; the strongest is that adults age 50+ want to stay engaged and serve their communities. Participants emphasized the importance of remaining active, and they supported programs and legislation to make opportunities accessible for all. Participants called on government agencies,

“In addition to benefitting employees, flexible work schedules provide incentives for employers and the nation as a whole.”

nonprofit organizations, and the private sector to work together to invest in the active engagement of adults age 50+.

The next section of this paper outlines Age4Action’s recommendations for amending the Older Americans Act. With the upcoming reauthorization, Congress has an important opportunity to influence the role of individuals age 50+ in society and the trajectory of the nation’s future as it struggles to define how best to harness their time, talent, and experience. We call on the 112th Congress to be leaders in opening doors for all Americans to serve their communities and their country through work, service, learning, and leadership.



A panel in Los Angeles discusses lifelong learning for personal and community growth

Older Americans Act Recommendations

The Age4Action Network hosted six Older Americans Act Idea Forums around the country in the summer of 2010 to solicit ideas and recommendations about how to strengthen the Older Americans Act (OAA). What came out of those Forums was a call to action. We must do more to generate opportunities for adults age 50+ to work, serve, learn, and lead in their communities. From the ideas expressed at the Forum, we have identified three policy goals and nine specific recommendations for reaching them:

Develop a National Strategy

Engaging adults age 50+ in work, service, and learning is both a proven and necessary approach to improving the well-being of our aging nation. The Administration on Aging and the Corporation for National and Community Service have taken great initiative by supporting research on civic engagement among older adults and community programs to engage adults age 50+. These agencies must continue to work together with the aging network to create a national strategy for service among adults age 50+, building upon the information gained since the 2006 reauthorization.

Recommendation 1: Integrate into the Administration on Aging’s formal charges the currently authorized civic engagement resource center by mov-

ing the resource center from Title IV to Title II of the Older Americans Act. Authorize the Administration on Aging, the Corporation for National and Community Service, and the federal agency administering the Senior Community Service Employment Program (SCSEP) to work together to create a national strategy to tap older volunteers as a source of social capital to meet critical community needs.

The Administration on Aging (AoA) has the potential to be a catalyst for engaging Americans age 50+ who seek to engage in and improve their communities. The AoA should have the authority to be able fully to support



Former U.S. House Minority Leader Richard Gephardt educates the audience about the politics of civic engagement

“My name is Clara Pittman and I am a volunteer with the Experience Corps. Until recently I was not aware of the OAA and the many programs and service areas provided by them; but what is genius about the concept is that by providing comprehensive programs and services to older adults, many of those helped can in turn, through such programs, provide comprehensive services to others in need. That is a win-win situation.”

—Clara Pittman, Experience Corps volunteer, Philadelphia, PA

initiatives for work, service, learning, and leading that boost the aging network and support American communities and people age 50+ to be happier, healthier, and stronger.

Section 417, “Multigenerational and Civic Engagement,” authorizes a civic engagement resource center that has already begun to develop tools and resources to support the aging network in engaging adults age 50+ to work, serve, learn, and lead. Age4Action recommends that Congress move this demonstration project to Title II. Doing so will ensure that civic engagement initiatives have a more permanent place in the Older Americans Act and will have a greater impact on the millions of Americans age 50+.

In order to support further establishing a national approach for mobilizing the energy and talents of adults age 50+, Age4Action recommends authorizing AoA to work with the Corporation for National and Community Service to create a national strategy for mobilizing adults age 50+ to volunteer to help meeting critical community needs.

Age4Action recommends that Section 417, Multigenerational and Civic Engagement, be moved to Title II, the title that defines the purpose and scope of work of the Administration on Aging. Civic engagement is and should continue to be a central tenet of AoA, and moving the civic engagement section from Title IV to Title II will emphasize this priority and ensure ongoing support for AoA’s civic engagement work.

Authorize the Administration on Aging to create a national strategy—in collaboration with the Corporation for National and Community Service—to tap older volunteers as a source of social capital to meet critical community needs.

Recommendation 2: Authorize and fund projects for qualified institutions to collect and analyze data on the impact of work, service, learning, and leading on both the clients and communities receiving service, as well as on the adults 50+ providing service.

What do we know about adults age 50+? We know that currently they make up nearly 32 percent of the U.S.

“I wish more people would recognize volunteering as a central way to stay healthy and active. Organizations need to acknowledge older adults as resources as well as service recipients, and offer opportunities that fit with expectations of today’s volunteers.”

—Forum Participant, St. Paul, MN

population. We know that the percentage of adults age 50+ will increase by over 20 percent in the next 10 years and over 65 percent by 2050. We know that 62 million adults age 50+ in 2050 who are healthier and living longer than ever before can be an army of change-makers in our society.^{vi}

There are still many unanswered questions, however, about the impact that engagement has on individuals and society. How does civic engagement—lifelong work, service, learning, and leading affect adults age 50+? How does it impact their health? What are the long-term financial gains from their service and their improved long-term health and decreased healthcare costs? Where is the return on investment

(ROI) the largest? What will it take to replicate those high ROI ideas?

Many researchers have studied these questions surrounding work, service, learning, and leadership. Some findings are clear, such as the proven health benefits of volunteering. Other investigations have raised new questions that require more research. Though substantial progress has been made in expanding the wealth of quantitative research, there still exist great gaps in our understanding of work, service, learning, and leadership among adults age 50+.

Investing in further research will help the aging network strategize and efficiently allocate resources to support a rapidly aging population. Furthermore, this funding is necessary to promote collaboration and merge existing research on the significant health and wellness benefits of lifelong community engagement.

Age4Action recommends that Title IV of the Older Americans Act be amended to authorize research on the impact of civic engagement (work, service, and lifelong learning) on both the clients and communities receiving service, as well as on the adults age 50+ providing service.



Marcia Kerz, president of OASIS, provides insight on how innovation in adult education can prepare adults for work opportunities in later life

Recommendation 3: Enhance volunteer and SCSEP referral resources at area agencies on aging.

Connectivity among aging services providers will help the aging network further improve the allocation of resources and provision of quality services. Forum participants reiterated that local agencies are stronger when they work together. One key point of concern was the lack of shared resources between agencies to learn about work, service, learning, and leadership opportunities for adults age 50+. Many suggested that if a central hub existed for these resources, the need for sharing volunteer information among an unwieldy field of local organizations would be lessened. Age4Action recognizes that such a resource center was authorized in the Older Americans Act reauthorization of 2006, and the Network supports full funding for this project as well as its formalization under Title II.

Additionally, Age4Action believes that as the backbone for the nation’s senior services, the Area Agencies on Aging (AAAs) are well-suited to take a primary role in engaging adults age 50+ in work and service opportunities. Indeed, many AAAs already are leading the way. Established under the Older Americans Act in 1973, AAAs meet the needs of older Americans every day by providing referrals and direct programming for home and community-based services. Age4Action believes it is important that these agencies continue to meet the growing need for service and work by becoming resource hubs for local opportunities.

Age4Action recommends that Congress add to Title IV, “Activities for Health, Independence, and Longevity,” a requirement that when adults request information about volunteer opportunities, AAAs will refer them to a national database of opportunities or local service organizations or local SCSEP programs that offer volunteer placements.

Additionally, Age4Action recommends that Section 306, “Area Plans,” and Section 307, “State Plans,” be amended to include a comprehensive plan to tap the resources of adults age 50+ in volunteer and paid work, including multigenerational work and senior-to-senior service activities.

Strengthen the Capacity of Older Workers

Adults age 50+ are working longer than ever before. While some Americans choose to stay in the workforce for personal fulfillment, many more must continue working to support themselves and their families. Given the technological advances since this generation of older workers began their careers, it is essential to provide opportunities for older workers to gain technology skills for the current market. Furthermore, the changing marketplace presents new job possibilities for older workers to help at-risk older adults through elder justice initiatives.

Recommendation 4: Enhance quality technology training opportunities for SCSEP participants.

The volunteers, nonprofit staff, advocates, unemployed adults, and retired

Americans who participated in the OAA Idea Forums emphasized the importance of technology training. Discussions at the St. Paul, Philadelphia and St. Louis forums recommended expanding access to technology training courses, particularly programs that have been proven effective in teaching adults age 50+ beyond the basics of computer and Internet use. Several SCSEP providers, including the AARP Foundation and the National Caucus and Center on Black Aged, an Age4Action member, are already using a comprehensive curriculum that has demonstrated success in teaching adults computer skills. Additionally, Age4Action member organization The OASIS Institute is a leader in an evidence-based technology training curriculum called Connections.

Now more than ever, SCSEP participants are in need of technology training in order to help them secure a place in today’s workforce. Often, adults age 50+ require less physically strenuous jobs than they may have previously held. These jobs are typically desk jobs and require a strong foundation in computer literacy. Age4Action strongly supports increasing access to technology training programs with proven success for SCSEP participants in order to impart skills that will aid them in becoming self-sufficient, active contributors to their communities and the economy.

All too often, adults age 50+ find themselves in jobs where there is an assumed knowledge of technology and little formal “at work” training. If they seek outside training, some find that the classes available for general audiences

do not meet the pacing and learning needs of adults age 50+, thus inhibiting their development of effective skills. This results in a workforce that is not adequately prepared for success.

To draw attention to the need to bridge this gap, Age4Action recommends adding language to the Older Americans Act urging SCSEP grantees to expand technology training courses that are based on a proven quality curriculum designed for adults age 50+. SCSEP grantees should be urged to collaborate with local nonprofits such as The OASIS Institute in order to provide their participants with effective technology training programs that enable them to reenter the modern workforce with the confidence and technological literacy needed to succeed.

Age4Action recommends that language similar to the bipartisan bill H.R. 5269 (111th Congress) regarding technology training for older Americans be added to Title V. The bill states:

“...[T]he Senior Community Service Employment Program (SCSEP) established under section 502 of the Older Americans Act (42 U.S.C. 3056) and any other Federal program that provides job training and placement services for older adults should—

(1) work with nonprofit organizations that have a record of success in developing and implementing evidence-based technology curriculum designed specifically for older adults; and

(2) partner with such nonprofit organizations to provide training, comprehensive student materials, evaluation, and

support for a broad range of workforce technology skills, including basic and intermediate computer skills, Internet, email, word processing, spreadsheets, presentations, and other key skills appropriate for assisting older adults to enter or re-enter the workforce.”

Recommendation 5: Allow SCSEP programs to include elder abuse prevention and volunteer support for the State Long-Term Care Ombudsman Programs.

Part of SCSEP’s original aim was to engage adults in serving vulnerable members of their communities. With an aging population and limited funds for elder abuse prevention, the risk of elder abuse has become a critical social problem. Forum participants suggested that adults age 50+ get involved in helping elder abuse prevention initiatives by encouraging SCSEP grantees to place participants in community service roles specifically designed to serve other adults age 50+.

Working toward a solution, Forum participants recommended that adults age 50+ help prevent elder abuse by volunteering with the State Long-Term



Age4Action staff greet Los Angeles Forum attendees

Care Ombudsman (SLTCO) programs. Established by the Older Americans Act, the SLTCO programs’ purpose is to improve the quality of life and care for long-term care facility residents by addressing their specific problems and advocating for their rights. The Long-Term Care Ombudsman Program is the nation’s most robust tool to address specific concerns for the rights and safety of vulnerable adults age 50+. However, because of recent state and federal budget cuts, these programs increasingly rely on volunteer support.

Technology is what is out there. We especially need training in computers. Although I’m up in age, it would be good to know computers. I’m willing to learn. I have had two job offers where you need a certain skill, like PowerPoint. I tell them that I can do everything else and would be glad to learn PowerPoint or anything else if they will let me learn on the job. I’m a fast learner, but they want someone who already knows.

—Ethel Thomas, SCSEP Participant, St. Louis, MO

SCSEP provides older people the opportunity to continue to be productive and active, which leads to better health, increased longevity, and the feeling that they are still valued and important members of their communities. As the only federally funded employment program for low-income persons 55 or older, SCSEP is an essential part of the Older Americans Act and an important vehicle for those older Americans most in need to learn new skills, contribute to their community and obtain gainful employment. During the reauthorization process for the Older Americans Act, Congress will have the opportunity to examine how some policies have contradicted the intent and the purpose of SCSEP, and create a program that more fully serves the increasing needs of disadvantaged older Americans and their communities.

—Paul Anderson, *Employment & Training Coordinator, Experience Works, Wadena, MN*

Currently, the Older Americans Act designates SCSEP projects as allowable as long as they “will contribute to the general welfare of the community, which may include support for children, youth, and families.”^{vii} The Age4Action Network strongly supports and is a proponent of this kind of intergenerational service, but also supports *intra*-generational service—seniors helping seniors.

*Age4Action proposes an amendment to the Older Americans Act to ensure targeted placement of SCSEP participants in serving older adults and preventing elder abuse. Section 502(b)(1)(E) of the Older Americans Act should read that each project approved by the Secretary “will contribute to the general welfare of the community, which may include support for children, youth, families, **and for the health and safety of older adults.**”*
[Bold text to denote an addition]

Recommendation 6: Modify SCSEP program measures to account for durational exits.

Age4Action members and Forum participants have voiced concern over the durational limits, added in the 2006 OAA reauthorization, which limit the period of time participants may be employed through SCSEP. Additionally, members are concerned about the way these durational exits are counted in program measurements.

Because the aging network lacks consensus on whether or not to maintain term limits, the Age4Action Network has not put forward a recommendation to alter the current statute. Instead, Age4Action recommends that SCSEP participants and grantees work with Senior Corps and AmeriCorps programs and that the Administration on Aging partner with the Corporation for National and Community Service to

ensure that those who are unable to secure unsubsidized employment in the time limit allowed are able to find other resources for serving their communities and supporting their financial security.

Measuring the impact of durational limits, however, remains a sticking point. Accountability is essential to ensuring that federal dollars are well spent and that programs are providing effective services. The Department of Labor (DoL) designed a Common Measures framework to standardize outcome measurements across all Employment and Training (ETA) programs, including SCSEP. Having a system of common measures that gathers data over time to be analyzed and compared will help ETA increase accountability and improve its programs' performance.

Because of the Common Measures System, which Age4Action believes is a positive way to measure and compare programs with similar goals, all ETA program exits—that is, the count of the rate at which participants leave the program and their reasons why—are measured in the same way. However, no other ETA program has a time restriction like SCSEP's in which participants are involuntarily dismissed from the program without first securing unsubsidized employment.

These involuntary departures from SCSEP, which will take effect in 2011, will be included in the Common Measures evaluation. Because no other ETA program has a duration limit, comparing SCSEP's exits to those of other ETA programs will result in inconsistent measures for comparison.



A Denver Forum participant presents an idea from his small group discussion on community engagement among adults age 50+

If the durational limit measures are left in place as the regulations currently require, all SCSEP grantees will likely see a significant drop in retention compared to previous years, which will unnecessarily and *inaccurately* appear to lawmakers and appropriators that the program no longer works, which is simply not true. Such a false assumption could have negative consequences for SCSEP's future and on those participants who are so in need of and who benefit from the program.

Age4Action recommends that Congress take action now to ensure that SCSEP grantees are not negatively affected by this unequal measurement under the Common Measures framework. We recommend that Congress amend OAA Sec. 503(g) to require the Assistant Secretary for Employment and Training to waive any regulation that would include durational limit exits in exit data for any Employment and Training program.



The Los Angeles Forum audience learns about local and national strategies for expanding work, service, learning, and leadership opportunities for adults age 50+

Additionally, Age4Action recommends that the OAA direct the Department of Labor to include enrollment in Senior Corps and AmeriCorps programs as measures of employment if their enrollment follows departure from a SCSEP-subsidized employment position.

Promote Sustainable Volunteering

Volunteers are an invaluable asset to organizations that serve local and national communities. In America, volunteers contributed more than \$169 billion worth of service in 2009, including \$33 billion (20 percent) from individuals age 65 and older.^{viii} With a stalled economy, the need for services has increased while funding for services has been cut. Now more than ever Americans must help their neighbors and communities. Investments in building volunteer capacity, including volunteer training opportunities and meaningful service roles can produce an 8:1 return for organizations.

As engaged members of society, adults age 50+ harness their personal and professional experiences to serve their communities. The Older Americans Act presents an important opportunity to support initiatives that improve volunteer coordination and training so that older volunteers can better address social needs.

Recommendation 7: In order to increase the number of volunteers age 50+ and to improve volunteer retention, target resources towards establishing volunteer management programs that will train and place volunteer managers who are age 50+ in Area Agencies on Aging, senior centers, or other community-based organizations.

Volunteers who attended the Forums spoke of how service can be a meaningful, ongoing experience when volunteers are matched with activities that suit their interests and abilities and when their skills are channeled to serve the greater good. Community organizations must invest significant time and resources into ensuring that volunteers are fully trained and appropriately assigned to a service role. When these resources for training and volunteer placement are not available, many community organizations either place volunteers in low-skill, short-term positions or fail to utilize volunteers at all.

“Age4Action also supports intra-generational service—seniors helping seniors.”

The Age4Action Network recommends that the Older Americans Act be amended to create a volunteer management grant program available to senior centers, Area Agencies on Aging, and other nonprofit organizations. The grants should be awarded to organizations to support volunteer management programs that train volunteer managers who are age 50+ in effective volunteer recruitment, training, placement, and retention practices. The grant program should be administered under the civic engagement authority of the Administration on Aging.

Recommendation 8: Make safety and liability measures such as driver’s license checks and criminal background checks an allowable use of funds under Title III.

The safety of volunteers and service recipients is a crucial concern, and safeguarding their security will encourage volunteering. At the Forums, representatives of local service organizations and Area Agencies on Aging discussed the challenges of recruiting volunteers when funds are too limited to afford necessary risk management services such as background and driver’s license checks. Agencies take on certain responsibilities and liabilities when engaging volunteers. They mitigate their risk by paying for services such as driver’s license checks for volunteer drivers or meal deliverers.

Because these security checks can be expensive, many agencies either cannot afford to recruit additional volunteers, or they allow unscreened volunteers to

participate. The latter can place clients, including children, disabled individuals, and vulnerable adults, in danger. This is not to say that volunteers are inherently dangerous. Indeed, the vast majority are well-intentioned, caring individuals who want to improve their communities and the lives of their neighbors. But, some may lack the qualifications needed to provide quality service or have exploitive or dangerous intentions, all of which are the reasons for background checks.

Another option agencies embrace—in order to avoid the fee for background checks but to continue to maintain volunteers—is to give volunteers tasks that do not involve client interaction and thus do not require as thorough a record check. These include office and clerical duties such as filing and database management. While important to the success of any organization, these assignments fail to harness the full potential of adults age 50+.

Age4Action recognizes the challenges agencies face in recruiting, training, placing, and retaining volunteers. Age4Action believes in the strength and work of volunteers and aims to ensure that all volunteers are properly placed in positions where they can be forces for good to vulnerable clients and the community.

Age4Action recommends that the Older Americans Act explicitly authorize that Title III funds may be used for risk management assessments, including but not limited to driver’s license and criminal background checks.

Recommendation 9: Include in the programs overseen by the Administration on Aging a targeted focus on preventing elder abuse, promoting elder justice, and providing services to victims of elder abuse.

The aging network’s responsibility is to ensure that the most vulnerable adults are properly cared for and have needed services and resources available to them. Unfortunately, anywhere between 700,000 and 3.5 million older Americans are abused, neglected, or exploited each year.^{ix}

Elder abuse takes many forms, including physical and emotional abuse, financial exploitation, and neglect. As the number of adults age 50+ rises, abuse prevention and protection services must keep pace.

With limited financial resources, service and volunteering can play a key role in boosting the capacity of elder abuse prevention services. The Older Americans Act must play a larger role in addressing elder abuse protection as a key area for service and leadership.

The Age4Action Network recommends that the Older Americans Act be amended by authorizing demonstration and support projects under 417(a)(1) to include projects that engage volunteers age 50+ in providing support and information to older adults and their families or caretakers who have experienced or are at risk of elder abuse including physical or emotional abuse, neglect, or exploitation. The Older Americans Act should also direct the Assistant Secretary for Aging to coordinate these projects with elder justice initiatives authorized under the Elder Justice Act and the Patient Protection and Affordable Care Act.

Conclusion

The Age4Action Network believes that individuals age 50+ will strengthen society and improve communities through their active engagement and valuable contributions as dynamic advocates, valued workers, committed volunteers, and lifelong learners. With input from Ameri-



St. Louis panelists discuss challenges in engaging adults age 50+ in volunteerism

cans outside the Capitol Beltway who make up Age4Action’s network of national advocates, providers, and program participants, Age4Action has learned not only that adults age 50+ value opportunities to work, serve, learn, and lead, but also that the gap in opportunities and accessibility to do so is large.

Age4Action recommends strengthening civic engagement and volunteer experiences for adults age 50+ through a volunteer management grant program, a statutory emphasis on the permanency of civic engagement as a key priority for the Administration on Aging, and inclusion of volunteer engagement strategies among Area Agency on Aging state plans as well as the creation of a national strategy to tap volunteers age 50+. The Network believes that research on the community impact of work, service, learning, and leadership among people age 50+ and the impact of that engagement on the health and lives of individuals age 50+ will help target resources to the most effective and important programs.

Age4Action also recommends finding ways to support senior-to-senior service and volunteering for elder abuse protection services in addition to maintaining strong intergenerational service. The Network supports safe volunteering by emphasizing the importance of background checks and by helping organizations meet the expenses of those checks.

And finally, Age4Action recommends improving SCSEP participants’ ability to secure unsubsidized employment through access to technology training courses



In Denver, small groups brainstorm community initiatives for adults transitioning from work to retirement

and protecting SCSEP by ensuring that its impact is accurately measured and appropriately compared to existing federal programs.

The Age4Action Network’s Older Americans Act Idea Forums came at a critical moment when the voices of adults age 50+ needed to be heard. Now is the time to build upon the excitement and ideas generated at the Forums and take action to increase opportunities for adults age 50+ to work, serve, learn, and lead in their communities. We must make the most of the OAA reauthorization as a chance to improve society and strengthen communities through the active engagement of individuals age 50+. Making these recommended changes in the Older Americans Act will ensure that opportunities to work, serve, learn, and lead in America will be strengthened and that this country is one where all can contribute—from the youngest to the eldest—to build a stronger nation.

Appendix

Methodology

Older Americans Act Idea Forums

Locations and Themes: The six locations for the Older Americans Act Idea Forums were chosen on the basis of several factors, including geographical diversity, location of partnering organizations and Age4Action Steering Committee members, political significance, and subject relevance. The theme and format for the Forums varied based on the issues of greatest importance to specific communities. For example, co-sponsoring organizations in Denver felt that small-group discussions would provide the most benefit to their community, and therefore the format was built around this idea of community dialogue.

Audience: Overall, attendance included a wide range of invested individuals including workers, volunteers, learners, and leaders over age 50. Additionally, academics, nonprofit leaders, service providers, government officials, and students filled the audience.

Attendance also varied greatly according to the structure of the event and the outreach strategies used to recruit attendees. In Las Vegas, Forum attendees were all part of the National Association of Nutrition and Aging Services Programs (NANASP) conference, so the majority of the audience were nutrition providers and volunteers, and organizations focused on nutrition and aging services. In St. Louis, older community members comprised most of the audience, along

Forum Attendance		
City	Theme	Approx. Attendance
Las Vegas	“Nutrition Programs, Older Workers and Volunteers”	190
Philadelphia	“Building Strong Transitions to Service, Work, and Learning”	40
St. Paul	“Furthering Civic Engagement for Individuals age 50+”	125
Denver	“A Community Dialogue on Civic Engagement and the Older Americans Act”	50
St. Louis	“Increasing Opportunities for Service, Work, and Learning”	150
Los Angeles	“Expanding Opportunities for Service, Learning, and Leadership”	200
Total		755

with local academics and geriatric and civic engagement researchers. The St. Paul audience consisted of community volunteers and others invested in the health and well-being of adults age 50+.

Speakers: The chart below lists the moderators and presenters for the six Forums. These speakers shared stories, challenges, and ideas about the issues of

work, service, learning, and leadership. Drawing upon their careers and personal experiences, the moderators asked questions of the presenters and provided background information on the Older Americans Act and civic engagement. In most Forums, presenters served on panels divided by topic and spoke for roughly five to ten minutes on their area of expertise.

List of Speakers

Location, Date	Moderators	Presenters	Open Testimony*	Small Groups**
Las Vegas, NV June 3, 2010	<ul style="list-style-type: none"> • Robert Blancato, President, Matz, Blancato, and Associates • Brian Lindberg, Public Policy Director, Experience Wave 	<ul style="list-style-type: none"> • Paul Downey, NANASP • Anita Gant, Heritage Senior Facility • Joann McGevers, Heritage Senior Facility • Anthony R. Sarmiento, Senior Service America • JoAnn Meeks, SCSEP • Faheem Salaam, SCSEP 	Yes	No
Philadelphia, PA June 22, 2010	<ul style="list-style-type: none"> • Harris Wofford, Former U.S. Senator (PA) • Phyllis Snyder, Vice President, CAEL • Lester Strong, CEO, Experience Corps • Brian Lindberg, Public Policy Director, Experience Wave 	<ul style="list-style-type: none"> • Dick Goldberg, Coming of Age • Richard Chevrefils, AARP Pennsylvania • Clara Pittman, Experience Corps • Marian Baldini, Health & Work Jewish Employment and Vocational Services • Bill Schafer, Orleans Technical Institute • Carolyn Walter, Widener University • Adam Brunner, Osher Lifelong Learning Institute at Temple University 	Yes	No

(Continues)

List of Speakers (Continued)

Location, Date	Moderators	Presenters	Open Testimony*	Small Groups**
St. Paul, MN July 12, 2010	<ul style="list-style-type: none"> • Greg O’Neill, Director, National Academy on an Aging Society • Mark Skeie, Member of Leadership Group, The Vital Aging Network 	<ul style="list-style-type: none"> • Tim Pawlenty, MN Governor • Jean Wood, MN Board on Aging • Mary Olsen Baker, Minnesota Department of Human Services • Tim Penny, Former U.S Representative • John Pribyl, Former Executive Director, MN Sr. Companions Program • Carol Daly, Former Director for Minnesota Elderhostel 	No	Yes
Denver, CO July 20, 2010	N/A	<ul style="list-style-type: none"> • Phil Nash, Rose Community Foundation • Derek Okubo, National Civic League • Sarah Christian, Volunteer Match 	No	Yes
St. Louis, MO July 22, 2010	<ul style="list-style-type: none"> • Carol Crecy, Director, Office of Communications and Outreach, U.S. Administration on Aging • Marcia Kerz, President, The OASIS Institute • Brian Lindberg, Director, Experience Wave • Greg O’Neill, Director, National Academy on an Aging Society 	<ul style="list-style-type: none"> • Richard Gephardt, Former Majority Leader U.S. House of Representatives • Nancy Morrow-Howell, George Warren Brown School of Social Work • David Sykora, St. Louis Area Agency on Aging • LaShona McGrew, McCormack Baron Ragan • Heather Ellison, Plus 50 Initiative, St. Louis Community College • Mildred Boyd, Monsanto YMCA • Don Vaisvil, Title V Programs, MERS/Goodwill • Delores Branch, AARP Foundation Senior Employment Program • Mary Schaefer, MidEast Area Agency on Aging 	Yes	No

(Continues)

List of Speakers (Continued)

Location, Date	Moderators	Presenters	Open Testimony*	Small Groups**
Los Angeles, CA July 27, 2010	<ul style="list-style-type: none"> • Harris Wofford, Former U.S. Senator (PA) • Patrick Cullinane, Director, UC Berkeley Retirement Center • Jonathan Tran, California Policy Advocate, Southeast Asia Resource Action Center • Brian Lindberg, Public Policy Director, Experience Wave 	<ul style="list-style-type: none"> • David Gooler, Rebuilding Together Pasadena • Donna Benton, Los Angeles Caregiver Resource Center • Monika White, University of Southern California • Nicole Kaplan, ITNGreaterLA™ • Jerome Walker, USC Emeriti Center College • Gordon Gibb, St. Barnabas Senior Services • Connie Robinson, Pacific Region OASIS • Laura Trejo, Los Angeles Department of Aging • Grace Cheng Braun, WISE & Healthy Aging • Jon Pynoos, USC Davis School of Gerontology • Robert Blancato, Matz Blancato & Associates 	Yes	No

* Open Testimony: Forum attendees given the opportunity to speak for up to three minutes at the end of the Forum. Content included OAA ideas and experiences with individuals age 50+ and work, service, lifelong learning, and leadership.

** Small Groups: Forum participants split up into small discussion groups to answer specific questions about challenges and best practices in their communities around the areas of work, service, lifelong learning, and leadership. The groups took notes and shared with the larger audience specific suggestions to improve the OAA.

“Shifting the public perception of adults age 50+ remains one of the greatest hurdles in viewing these individuals as leaders.”

Survey

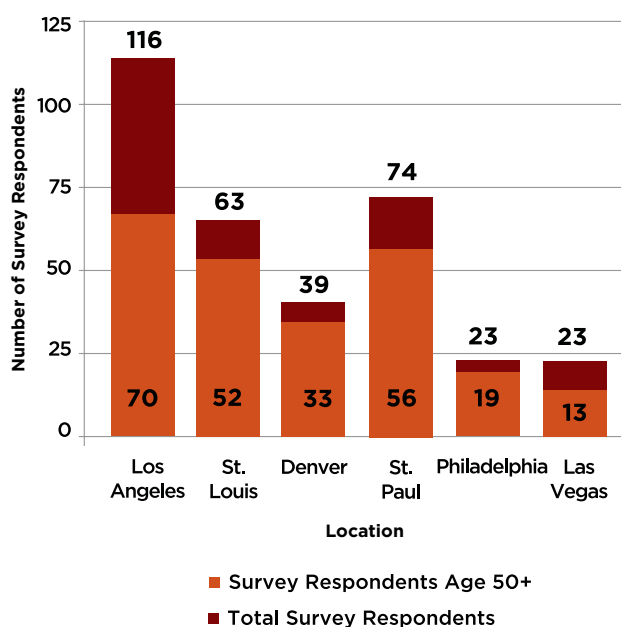
A 20-question survey developed by the Age4Action Network with assistance from colleagues at the George Warren Brown School of Social Work at Washington University in St. Louis was distributed to all Forum attendees during the event. Only Forum participants were eligible to submit surveys, either in person at the event, or by mail or fax after the event. The survey elicited feedback on the topics of work, service, lifelong learning, and leadership, as well as additional thoughts or ideas for the OAA.

Questions on the survey included demographic questions such as gender, age, race, residential location, education, and employment status of the survey respondent. Following these background questions, the survey divided content into categories of “Employment-Work,” “Volunteering-Service,” and “Education-Lifelong Learning.” These three sections included questions related to involvement in work, service, and learning, and barriers to engagement in these activities. A final section titled “2011 OAA Reauthorization” asked survey respondents how they would like to learn about opportunities to work, serve, learn, and lead, and solicited additional comments on how the OAA can improve access to these opportunities.

Due to the occupations and interests of Forum attendees, and therefore surveyed individuals, this sample is not intended to be representative of the overall U.S. population. In order to receive information from a more expansive group, however, many of the questions asked respondents if they “knew others”

who experienced certain barriers. This type of question accounts for perspectives of individuals 50+ not widely represented at the Forum, for example those receiving services by a provider in attendance.

Number of Survey Respondents by Location and Age

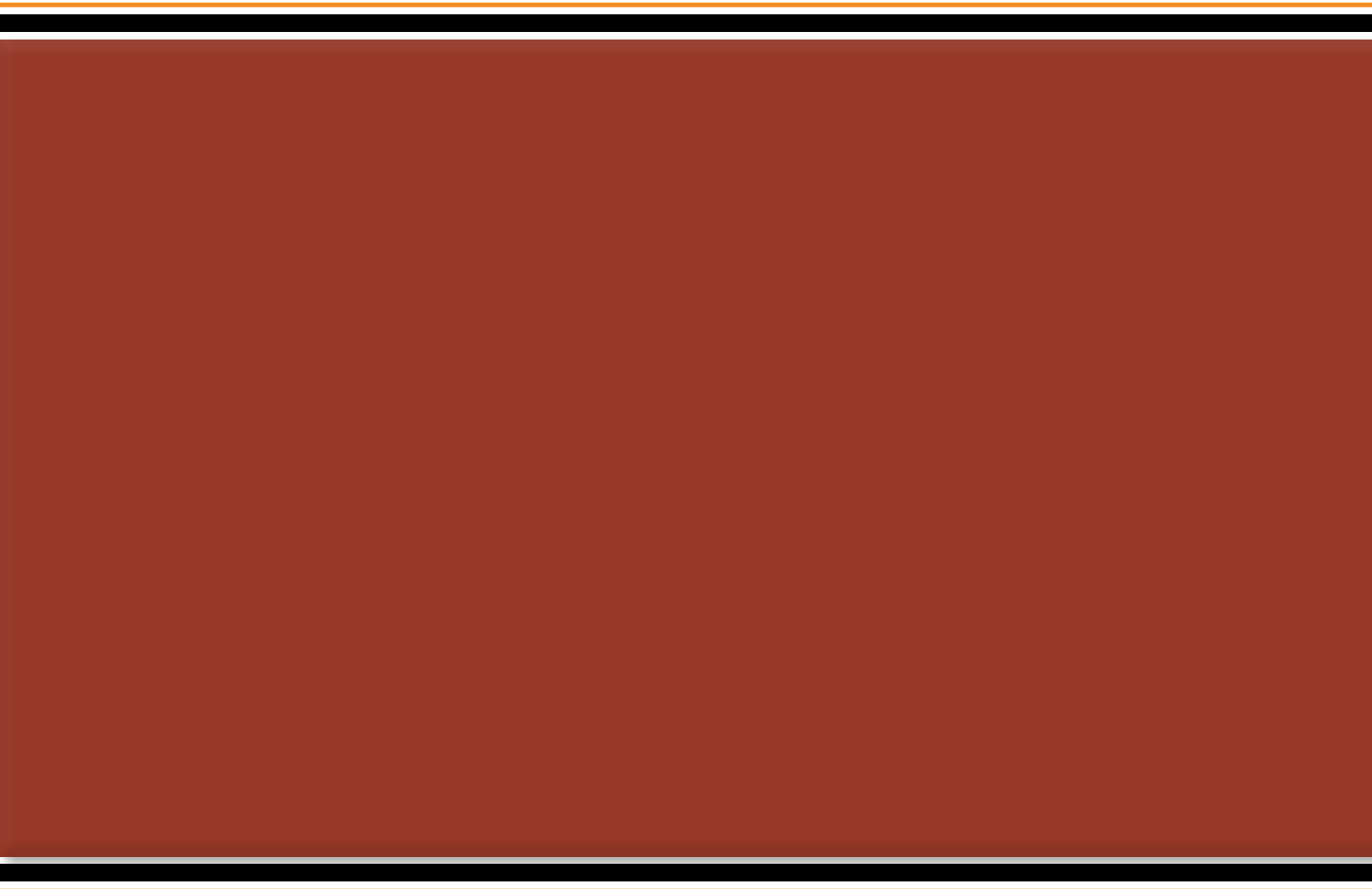


A total of 338 Forum participants completed the anonymous survey, with 71.9 percent of these respondents age 50 and over. See chart above for more details about the location and age breakdowns of survey respondents.

End Notes

- ⁱ Mayer, Gerald, “The Trend in Long-Term Unemployment and Characteristics of Workers Unemployed for More than 99 Weeks,” Congressional Research Service (20 December, 2010) <http://www.fas.org/sgp/crs/misc/R41559.pdf>
- ⁱⁱ The President’s FY 2012 budget proposes moving SCSEP from the Department of Labor to the Administration on Aging.
- ⁱⁱⁱ A civic nation. (2010, August). *2010 Civic Health Assessment*, p. 2.
- ^{iv} The survey defined formal and informal volunteering through examples. Formal volunteering included working at nonprofits and places of worship, whereas informal volunteering included helping a home-bound neighbor, friend, or relative.
- ^v National Council on Aging. (2010, April). The boomer solution: skilled talent to meet nonprofit needs. Retrieved from <http://www.ncoa.org/strengthening-community-organizations/community-action-volunteering/boomer-solutins-skilled.html>
- ^{vi} U.S. Census Bureau Population Division, “Table 12. Projections of the Population by Age and Sex for the United States: 2010 to 2050,” August 14, 2008.
- ^{vii} Older Americans Act 2006, Section 502(b)(1)(E).
- ^{viii} Corporation for National and Community Service. (June 2010). Volunteering in America 2010: National, State, and City Information from <http://www.volunteeringinamerica.gov/assets/resources/IssueBriefFINALJune14.pdf>
- ^{ix} National Center on Elder Abuse. (2010, October). How to answer those tough questions about elder abuse. Retrieved from http://www.ncea.aoa.gov/Ncearoot/Main_Site/pdf/publication/HowToAnswerToughQuestionsAboutElderAbuse_final.pdf

Notes





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