

## MEMORANDUM

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### Overview

This memorandum supplements JBS's Senior Corps systematic review and synthesis report by offering recommendations specific to the Corporation for National and Community Service's Office of Research and Evaluation and the Senior Corps program office. These recommendations are informed primarily by key informant interviews conducted with current and former Senior Corps staff in the Spring of 2019 (see Appendix A for the interview protocol). These interviews were designed to inform the Senior Corps timeline of research and evaluation activities, to identify relevant grey literature on the Senior Corps programs, to identify strengths and weaknesses of the Senior Corps evidence base, and to propose directions for future research. This memo outlines four recommendations based on themes from these interviews and grounded in the findings of the systematic review of the scientific quality of the evidence underlying Senior Corps. These recommendations can inform decisions about program improvements and future research.

Detailed findings of our systematic review and synthesis are presented in a separate report, as are recommendations specifically based on these findings. Overall, the systematic review found a positive impact of Senior Corps participation (75% of the outcomes studied have positive results) on the volunteers and beneficiaries. The majority of the evaluations examined psychosocial and physical health outcomes; consequently, the majority of the positive outcomes observed for volunteers are in those two domains. Most of these positive findings (78%) were from non-experimental designs, and most did not directly test for statistical significance. Therefore, more rigorous evaluation will help address selection bias and further strengthen the evidence base, as discussed in the systematic review and synthesis report.

In addition to the recommendations discussed in the main Senior Corps systematic review and synthesis report, this memo outlines four additional CNCS-specific recommendations informed by the interviews. These recommendations include:

1. Increase the evidence base for the impact of Senior Corps national service on beneficiaries;
2. Study RSVP programs and consider using them for exploratory research on the impact of volunteering;
3. Conduct return on investment or cost-benefit studies on the impact of Senior Corps; and
4. Evaluate the impact of changes in program requirements on implementation and on volunteers and beneficiaries.

## **Recommendation 1: Increase the evidence base for the impact of Senior Corps national service on beneficiaries**

A key finding of the systematic review report was that there are relatively few rigorous evaluations of the impacts of Senior Corps on the beneficiaries. In the review, 35% of the positive impacts observed were for beneficiaries such as clients, caregivers, and children. Although some recent evaluations have been conducted looking at the impact of SCP on clients and caregivers, none of these evaluations included a matched comparison group. Additionally, there are very few beneficiary studies overall and even fewer evaluations of FGP and RSVP beneficiaries (specific recommendations for evaluating RSVP are discussed in recommendation 3 below).

For FGP child beneficiaries, our systematic review only identified ten outcomes (roughly 10% of all the outcomes studied), and only one of these was evaluated with a QED or RCT design. In addition, several evaluations of FGP beneficiaries were conducted in the 1970s and 1980s, but, since then, FGP beneficiaries have changed dramatically from children in institutions to mostly children in schools. Evaluation studies are needed to understand the impact for this new beneficiary population. The FGP evidence base will be strengthened not only by conducting additional studies that rule out threats to internal validity such as selection bias, but also studies of the more recent FGP beneficiaries.

SCP beneficiary evaluations would also be helpful to assess the unique impact of the program, ideally in reference to a comparison group. In light of the rapid aging of the U.S. population and growing health care and support needs of older adults (See Population Reference Bureau, 2011), SCP could be an especially promising program for future government investment. But, demonstrating that SCP improves the health and well-being of the clients and/or keeps them out of expensive nursing care requires reliable beneficiary evaluations.

It may also be helpful to invest in implementation evaluations looking at the characteristics of beneficiaries receiving services to ensure that services are going to those who would most benefit, particularly among SCP beneficiaries. Although the Senior Corps Longitudinal Evaluation (Georges et al., 2018) did include some implementation data showing that SCP beneficiaries were on average low-income, several interviewees mentioned the need to further

evaluate the characteristics of those receiving SCP services. These individuals noted that while the program requires income-verification for participants, this is not the case for clients. Although some sites do coordinate their efforts with the Medicaid-waiver program to refer dual-eligible individuals to SCP services, this is not universally the case, and future efforts may be needed to ensure that individuals who would benefit are connecting with program services in their communities.

## **Recommendation 2: Study RSVP programs and consider using them for exploratory research on volunteering**

As we emphasized in our report, our systematic review included relatively few outcomes from RSVP (N=21, 19% of all outcomes), and these outcomes focused almost exclusively on benefits to the volunteer. Additionally, only 10% of the RSVP outcomes studied were examined using a QED or RCT design, so there is a need for more RSVP evaluation overall, more evaluation of RSVP beneficiaries at both the individual and community-level, and more rigorous evaluation designs that address selection bias. RSVP programs are by nature somewhat more challenging to evaluate given the diversity in program activities and volunteer hours. On the other hand, the large number of volunteers and locations also provides a valuable opportunity for large scale evaluations and exploratory evaluations of new programs and practices (e.g.- evaluations identifying promising new volunteer efforts to combat opioid abuse, prevent elder abuse, support veterans).

Some potential research questions could include:

1. How is RSVP different from other service programs, and what is the unique opportunity it provides?
2. What impact have the RSVP open competitions had on the operation of the program?
3. To what extent are RSVP volunteers identified with the program? If volunteers are not highly identified with the program, what types of activities and supports would be useful to increase identification with the program?
4. What are the benefits of RSVP participation on volunteer's physical and psychosocial health?
5. Under what conditions is RSVP most successful?

The large number of RSVP volunteers (roughly 296,000 in 2015) and the diversity of focus areas and program activities (e.g.- varying hours of service and types of service activities) also provide a special opportunity for exploratory research. This research could examine motivations for volunteering; factors that predict recruitment, retention, engagement, and satisfaction; and key predictors of positive impacts from volunteering (such as the physical and psychosocial health benefits identified in our review). Additionally, since the demographics of RSVP volunteers are closely aligned with the demographics of older

volunteers nationwide (i.e.- middle income, white, well-educated, see Wheeler, Gorey, & Greenblatt, 1998 for information on the characteristics of older adult volunteers), research with this population could provide exploratory insights into factors that may influence volunteering in older adults more generally. Furthermore, by collecting data on the incoming characteristics of RSVP volunteers, their participation in different types of program activities over time, and benefits to the volunteer and beneficiaries, CNCS would conduct one of the largest nationwide evaluations of volunteering in older adults ever. Much of this data may already be collected by the agency, but evaluations of this data could provide significant contributions to the growing evidence of the benefits of volunteering for older adults and could also help the agency more clearly demonstrate the value of CNCS programs to Congress and other funding entities.

### **Recommendation 3: Conduct evaluations looking at the Return on Investment (ROI) or Cost-benefit of Senior Corps**

During our systematic review, we were unable to locate a single cost-benefit or return-on-investment (ROI) study on the impacts of Senior Corps. There may have been a cost-benefit analysis conducted under the ACTION agency in the 1980s, but we were unable to locate this report, and it would be out of date. Despite the lack of studies on this topic, the economic and societal benefits of the Senior Corps program for both volunteers and beneficiaries were emphasized by every single interviewee. Furthermore, this study gap is more important than ever given projected spikes in the proportion of the population over 65. According to 2016 U.S. Census Bureau projections, the number of Americans aged 65 and older is projected to more than double from 46 million today to more than 98 million by 2060, and the 65-and-older age group's share of the total population will rise from 15 percent to nearly 24 percent or roughly 1 in 4 members of the U.S. population. Considering this, we strongly recommend that CNCS consider conducting a cost-benefit or ROI study to quantify the economic benefits of Senior Corps.

ROI studies examining the impacts of the program on older adults (volunteers as well as SCP and RSVP beneficiaries) may be especially important to demonstrate the governmental cost savings of Senior Corps programs. Several reviews indicate the positive health and longevity benefits of volunteering for older adults and demonstrate that volunteering helps to keep seniors productively engaged and out of expensive nursing homes and support services (see Okun, Yeung, and Brown, 2013). Given that the high costs of nursing homes and support services are often shouldered by the federal government through Medicaid (Kaiser Family Foundation, 2017), Senior Corps volunteers, in particular SCP volunteers, might create substantial cost savings for the government. ROI studies could calculate these cost savings and quantify the economic benefits of Senior Corps services for both volunteers, beneficiaries and the communities served.

Additionally, since our systematic review did not identify any studies looking at how implementation of various program components may influence program impacts, it would be helpful for ROI studies to dive into which components of implementation are most critical to achieving program impact while minimizing costs. CNCS has been collecting program implementation and performance measure data for many years (e.g., number of hours served, number of children served), but several interviewees expressed concerns that this data was not being used as effectively as it could be. In particular, interviewees noted that it may be helpful to begin using this data to examine ROI and to identify promising practices that could be shared back with programs and key internal and external stakeholders (such as CNCS staff, staff from other agencies serving older adults, and Congress). Additionally, interviewees expressed that building out existing data systems and investing in data support staff would allow for more effective real-time monitoring of program participants and activities and could provide valuable information for cost-benefit and ROI studies.

## **Recommendation 4: Evaluate the impact of changes in program requirements on implementation and impact**

Overall, as noted in our review, there is very little research investigating the precise conditions under which the benefits of volunteering (for both volunteers and beneficiaries) appear. In particular, it is unclear whether or not a certain threshold of volunteer hours, training, or activities is essential for the health or psychosocial benefits to occur. As such, it may be helpful for future evaluations to delve into this issue and investigate the impact that changes in program regulations might have on program implementation and on impacts for both volunteers and beneficiaries.

In January 2019, CNCS initiated several significant changes to the requirements and operations of the Senior Companion and Foster Grandparent programs designed to increase recruitment and retention of volunteers, reduce administrative burden on programs, increase program impacts, and promote project innovation. According to the CNCS website, these changes included the following:

- a. Shifting volunteer requirements from a minimum of 15 hours a week to 5 hours per week (with a minimum of 260 hours annually);
- b. Reducing the required pre-service orientation training from 40 to 24 hours and monthly in-service training from 40 to 24 annually;
- c. Removing the requirement for volunteers to complete an annual physical exam and instead offering volunteers cost reimbursements for optional physical exams; and
- d. Revising the non-stipend volunteer service requirement to mirror stipended volunteer service requirements by allowing non-stipended volunteers to serve at the same volunteer

stations as stipended volunteers and by encouraging programs to have the same average weekly service hour requirement for both types of volunteers.

As Senior Corps begins implementing these changes, there is a unique opportunity to evaluate how changes in program implementation and changes in program dosage in particular impact volunteers and beneficiaries. It may be useful to evaluate if and how these changes affect Senior Corps' ability to meet its original goals of providing income stability, meaningful employment, and reduced social isolation for older adults. Also, serving fewer volunteer hours might limit the creation of the meaningful relationships between volunteers and their clients (both children and other older adults) that have been integral to the program.

Our systematic review did not identify any studies looking at how program impacts may change as a result of program implementation (e.g.- number of hours served, type of training received, etc.). This seems like an important area for future research, especially given that many interviewees expressed concerns that changes in program implementation might have an influence on the program's positive impacts for volunteers and beneficiaries. Past evaluation studies that have examined training show that Senior Corps volunteers find such training to be important in their ability to perform their duties (see Georges et al., 2018). A change in training requirement might affect how well prepared the volunteers feel about carrying out their service. Additionally, reducing training requirements and physical examination requirements could result in volunteers who are less able to provide high-quality support to clients and children. Furthermore, interviewees noted that increasing the participation of non-stipended volunteers might change the nature of the program because it was originally created as an anti-poverty program, and non-stipended volunteers do not meet income eligibility requirements. One interviewee noted that although the program currently allows non-stipended volunteers, this has historically been rare in practice because programs were concerned that having non-stipended volunteers serve with stipended volunteers could result in resentment. As such, it will be important for CNCS to evaluate how these changes are implemented and what impacts they may have on program recruitment, retention, program operations, and benefits to the volunteer and recipient.

Potential research questions could include:

- a. How are program changes being implemented?
- b. What impacts do these changes have on recruitment and retention?
- c. Are these changes impacting the type of volunteers who participate in the program (e.g.- demographics, motivations for volunteering, etc.)?
- d. Do these changes impact program-related improvements in volunteers' income stability, social connectedness, sense of meaning and purpose, and physical health?
- e. Do these changes impact the program's ability to positively impact client or child outcomes such as physical health, mental health, social connectedness, school readiness, and K-12 success?

- f. Do these changes impact the volunteers' ability to form meaningful relationships with their clients?

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## Appendix A: Senior Corps Key Informant Interview Protocol

### Goals for the interviews:

- Develop a shared understanding of the history of the Senior Corps programs and key events in the program’s history to inform the timeline
- Collect background on “big picture” factors shaping the Senior Corps research and evaluation agenda over time
- Identify key Senior Corps studies/evaluations (studies on Senior Corps specifically and studies on Senior Corps beneficiaries/communities served)
- Flag any potential grey literature (non-published evaluation studies, dissertations, etc.)
- Identify key studies on the impact of volunteering in older adults (particularly any meta-analysis or meta-synthesis papers, or books that might be relevant)
- Ask informants to comment on their sense of the strength of the evidence base for Senior Corps-- Identify strengths and weaknesses in the literature on the impacts of Senior Corps—what impacts/outcomes do we feel confident about and which ones are more exploratory
- Identify specific models that seem like they have more or less evidence of effectiveness and determine if the evidence base differs across different Senior Corps programs

### Interview Script:

My name is Rebecca Frazier, and I work for JBS International as a part of the research team working with Senior Corps and the Office of Research and Evaluation to conduct a comprehensive research literature review for the Senior Corps program. In this review, we are examining existing studies, annual reports, performance measures, and implementation, outcomes and impact studies conducted by or for the Senior Corps program over the last 50 years. The purpose of this project is to assess and synthesize the collective knowledge regarding the impact of Senior Corps, on members, organizations, and on the community.

This literature review includes a document search of existing Senior Corp records, National Archive documents, and academic literature, including both published studies and unpublished dissertation research.

Key findings will be described in a final report on impact of volunteering on older adults in general and the impact of Senior Corps in particular, and we are considering submitting this report for publication either in a peer-reviewed journal or book. We will also be developing an annotated bibliography and visual timeline documenting the history of the program and key developments, its evidence base, as well as

providing recommendations for future evaluations (including a potential meta-analysis) and recommendations for Senior Corps and CNCS more broadly.

To help contextualize these findings, we are also conducting key informant interviews with current and former Senior Corps staff members such as yourself. Today's interview is designed to help us learn more about the context of this research and to identify other potential studies and sources to consider in our review.

The interview should take no more than 60 minutes. Additionally, we may contact you after today's interview to clarify responses or obtain additional information if needed. We would like to record today's interview as a backup to our written notes, but the recording will remain confidential and will be destroyed after the interview notes are finalized. No comments will be attributed to you without your consent.

Is it OK if I begin recording now?

[IF YES, START RECORDING.]

Thank you for agreeing to participate in this interview. Do you have any questions for me before we begin?

### Interview Questions

1. Can you please tell me a little bit about your involvement with the Senior Corps program (how many years you worked with the program, when, and in what capacity)?
2. Can you share with me a little bit about the history and goals of the Senior Corps program? Feel free to reference the attached timeline of Senior Corps events and let me know if any of the events listed stand out to you as being especially important.
3. Have you been involved in any of Senior Corp's evaluation efforts? If so, can you tell me a little bit about these projects?
4. Do you know of any other studies or evaluations that have been critical to building the evidence base for Senior Corps?
5. In your opinion, how strong do you think the evidence base is for Senior Corps overall? Are there certain programs, outcome areas, or models that you think have stronger evidence than others?
6. Is there anything else you'd like to share with me about the history of the Senior Corps program or about the state of the evidence supporting it?