

August 18, 2011

The Use of Volunteers in State Agencies on Aging and Disabilities

Senior Medicare Patrol (SMP)

Background

Engaging Volunteers in the Aging Network: A National Resource Center is a project funded by an Administration on Aging (AoA) grant to the National Association of Area Agencies on Aging (n4a). This three-year project is designed to enhance the engagement of volunteers in the Aging Network, with an emphasis on increasing volunteer participation of the Baby Boom generation¹. In addition to AoA and n4a, the project partners include: the National Association of States United for Aging and Disabilities (NASUAD); the AARP Foundation; Senior Service America, Inc. (SSAI); the University of Michigan; and The Council on Certification for Volunteer Administration (CCVA). The National Council on Aging (NCOA) and the Corporation for National and Community Service (CNCS) are also working on the project in a collaborative role.

The primary goal of the project is to develop a national volunteer resource center to provide technical assistance for organizations and agencies to establish AoA and the National Aging Network as leaders in civic engagement. An additional aim of the project is to facilitate enlistment of Baby Boomers in civic engagement to fill a service gap created by budget constraints and a growing number of older adults who seek assistance from the Aging Network.

Given the recent economic downturn, states are looking for ways to cut spending, while maintaining as many services as possible. Enlistment of volunteers, especially Boomers, in the delivery of Aging Network services represents an opportunity for states to continue serving older adults despite the declining budget, as the population of older adults steadily grows. Through assessment, collaboration and coordination of resources, project partners aim to develop a national resource center

¹ The large cohort of people that make up the Baby Boom generation, or “Baby Boomers,” are currently ages 47-65, nearing or recently beginning retirement. The population of Baby Boomers is viewed by project partners as an important target for volunteer recruitment due to their numbers, professional skills and possible free time to devote to volunteerism.

that will assist state and local organizations in utilizing volunteers to overcome economic barriers.

In order to establish a baseline for the level of civic engagement in the Aging Network, NASUAD and n4a conducted both quantitative and qualitative assessments of current state and local programs, which rely on a volunteer workforce. The assessments drew information on volunteer program details such as funding sources; volunteer demographics and participation numbers; program management; screening; training; and the value programs place on their volunteer programs. The assessment results will help inform the partners on areas of focus throughout the development of a national resource center.

Methodology

The NASUAD assessment was performed in two parts: an online scan², and three follow-up conference calls with program directors. The online scan was sent to 204 state-level directors of four programs on March 2, 2011: 1) 51 directors of State Health Insurance Programs (SHIP); 2) 51 directors of Senior Medicare Patrol programs (SMP); 3) 51 directors of State Long Term Care (LTC) Ombudsman programs; and 4) 51 directors of Aging and Disability Resource Centers (ADRC). In the first phase of the assessment, NASUAD's online scan was comprised of both 'core questions' (questions included both in NASUAD and n4a scans), and supplemental questions including in-depth state program-specific questions about current volunteer program details and techniques for recruitment and retention. The purpose of the assessment was to establish a baseline for the level of civic engagement in the programs reviewed, and to gain a broader understanding of how programs recruit, retain, coordinate, and utilize their volunteer base.

The Senior Medicaid Patrol (SMP) program trains retired professionals to recognize and report health care fraud. This program empowers seniors by increasing their understanding of the health care system and Medicaid rules to help them protect themselves and other seniors from Medicare and Medicaid fraud and abuse.

² See Appendix 2 for full NASUAD online scan

The NASUAD assessment aimed to capture only state-level programs, however many states also have similar volunteer programs at the local level which are generally administered by Area Agencies on Aging (AAAs). Details regarding local volunteer programs were captured through n4a's assessment of the AAAs. Eight states and the District of Columbia do not have Area Agencies on Aging: Alaska, Delaware, Nevada, New Hampshire, North Dakota, Rhode Island, South Dakota, and Wyoming. For these states and the District of Columbia, the State Agencies on Aging and Disability function as both the state and local agency, and details regarding their volunteer programs are captured in a separate NASUAD assessment of State Agencies on Aging and Disability.

The second phase of the assessment was a series of three program-specific conference calls held with the state directors of the SHIP, SMP, and state LTC Ombudsman programs. The SMP call was one hour in length and was held on April 5, 2011. Approximately 28 SMP directors, four representatives from the Administration on Aging, representatives from the SMP Resource Center and three NASUAD staff members participated in the call. During the call, NASUAD presented program-specific findings from the online scan, and asked the SMP directors follow-up questions to gain a more in-depth understanding of the individual program data collected in the online scan. NASUAD also elicited suggestions for the new national volunteer resource center.

Key Findings

SMP responses to the online scan differed from the overall program responses in several ways. SMP programs have the most consistent funding source of the programs reviewed, a federal SMP grant through AoA. Due to the steady federal funding, SMP programs are the most likely to have a statewide volunteer coordinator. Though SMP volunteers are predominately female, SMP directors reported higher levels of male volunteers than the other state programs, and several states reported having more male volunteers than female. SMP programs also had the lowest number of Boomer volunteers; SMP directors reported that Boomers made up 36 percent of their volunteer workforce, compared to 46 percent overall. Volunteers in SMP programs were more likely than volunteers in the other state programs to work on administrative tasks: 74 percent of directors reported SMP

volunteers working on administrative tasks, compared to 61 percent overall, and the greatest challenge reported by SMP program directors is transportation, particularly in rural areas.

The conference call with SMP directors elicited important information on SMP programs and how they can be strengthened. When asked about recruitment methods, one SMP director described her program's professionally designed website. She said that it has helped recruit many volunteers, and contains elements which specifically target the recruitment of Boomers. Another important recruiting tool reported by several directors is providing volunteers the opportunity to work within their own communities. One director reported that SMP volunteers in her state can meet with clients at locations such as a town library or community center, removing the need for transportation and allowing the volunteer to be more easily connected with his or her clients and community. Another director discussed having older adult volunteers act as spokespeople for large apartment complexes, able to serve both as SMP volunteers and looking out for other problems among the residents. This allows residents who have difficulty leaving the apartment complex to be SMP volunteers close to home.

SMP programs have the lowest rate of Boomer volunteers in comparison to the other state volunteer programs due to several factors. Many volunteers get involved with the SMP program because they have experience with Medicare, often becoming volunteers after being victims of fraud themselves. This means that many people will not start to volunteer until they have reached the age of 65 or older. Directors commented on the difference between Boomer volunteers and other volunteers. "Boomers," one said, "want to learn more than other groups." Boomer volunteers are often personally motivated to protect the Medicare program for their own future medical needs.

Despite the consistent funding for the SMP program, many directors still reported staffing shortages, while several directors shared their solutions to staffing issues. One said that her program hired several senior volunteers to work part-time paying jobs, allowing them to make money, while still fulfilling their interest in protecting Medicare and helping other seniors. Other directors discussed the use of long-time volunteers as volunteer managers, and for training new volunteer recruits.

SMP programs are all supported by the “National Consumer Protection Technical Resource Center: The Center of Service and Information for SMPs”, a SMP-specific resource center. The new National Resource Center aims to provide added support, by increasing national awareness and information on many different volunteer programs related to the Aging Network. When asked how a new national volunteer resource center could assist them, directors had several ideas. They suggested assistance with performing and financing volunteer background checks. Since volunteers work directly with disadvantaged populations, directors recognize the importance of perform rigorous background checks on every potential volunteer, however, background checks are generally very expensive and difficult to arrange. Directors also suggested a library of trends and best practices on volunteer recruitment and retention as well as sharing of information on funding sources and job descriptions throughout national volunteer programs and would all be extremely helpful.

Conclusions

Overall, the reports of the SMP directors indicated that SMP programs are faring better than many other programs through the recent economic downturn. Consistent funding through the AoA SMP grant has allowed most programs to retain a statewide volunteer coordinator to support volunteers. However, SMP programs have still incurred many consequences of the recession including their volunteer base (more volunteers needing to make money at paid employment over volunteer positions), clients (higher need for SMP volunteer assistance), and the program itself (lower levels of non-federal funding). The greatest reported strength of the SMP program is its robust base of trained, dedicated volunteers who use their knowledge of Medicare to help protect their clients and the Medicare program from fraud and abuse. SMP programs are well supported by the SMP resource center. However, some of the ways SMP directors report the program can be further supported include assistance with background checks, libraries of best practice data, and tips on recruiting and retaining Boomer volunteers.

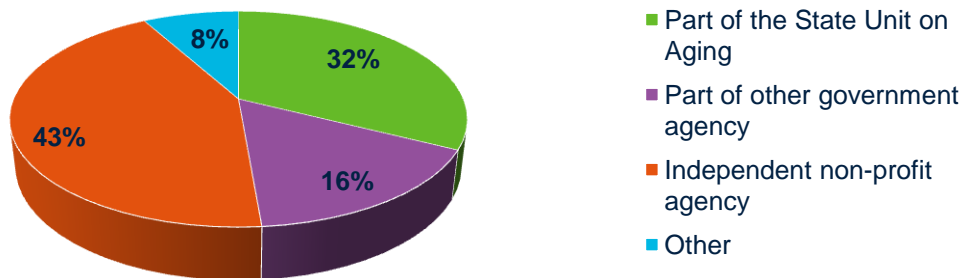
Appendix 1: Aggregate SMP Program Results

Participating States

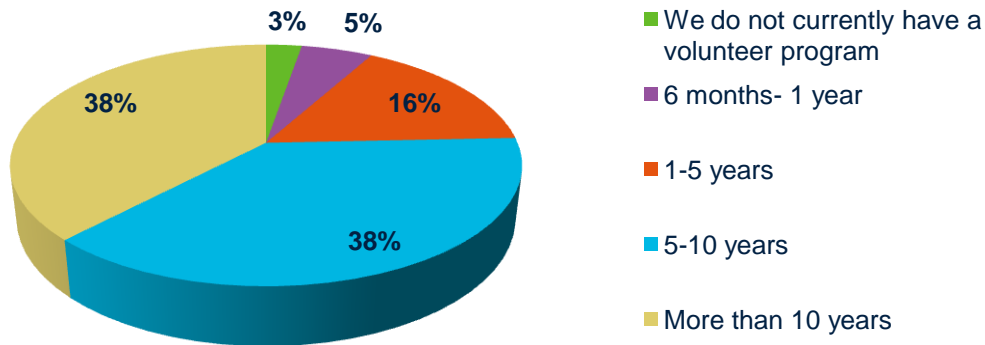
Total Responses: 36

California	Kentucky	Nevada	South Carolina
Colorado	Louisiana	New Jersey	South Dakota
Connecticut	Maine	New York	Tennessee
Delaware	Massachusetts	North Dakota	Texas
Florida	Michigan	Ohio	Utah
Guam	Mississippi	Oklahoma	Vermont
Hawaii	Missouri	Oregon	West Virginia
Illinois	Montana	Puerto Rico	Wisconsin
Kansas	Nebraska	Rhode Island	Wyoming

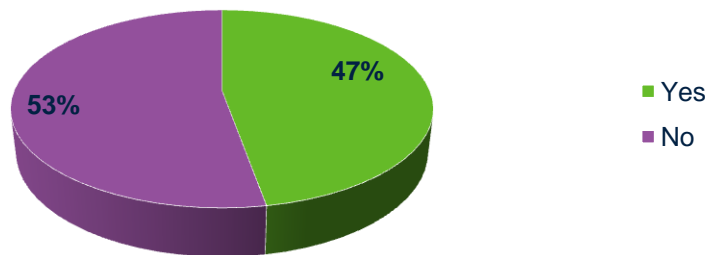
Type of Agency Housing SMP Program



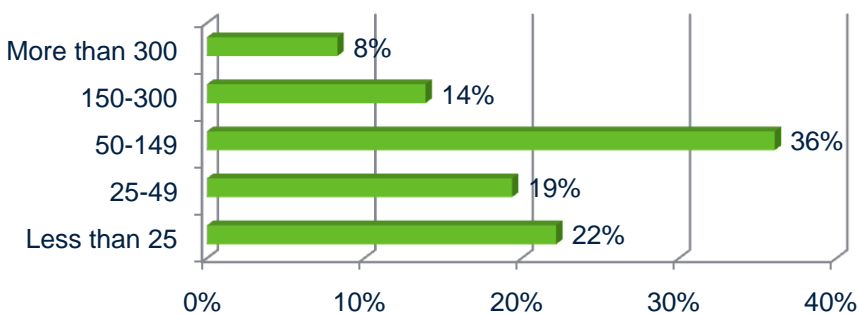
How long has your state had a volunteer SMP program?



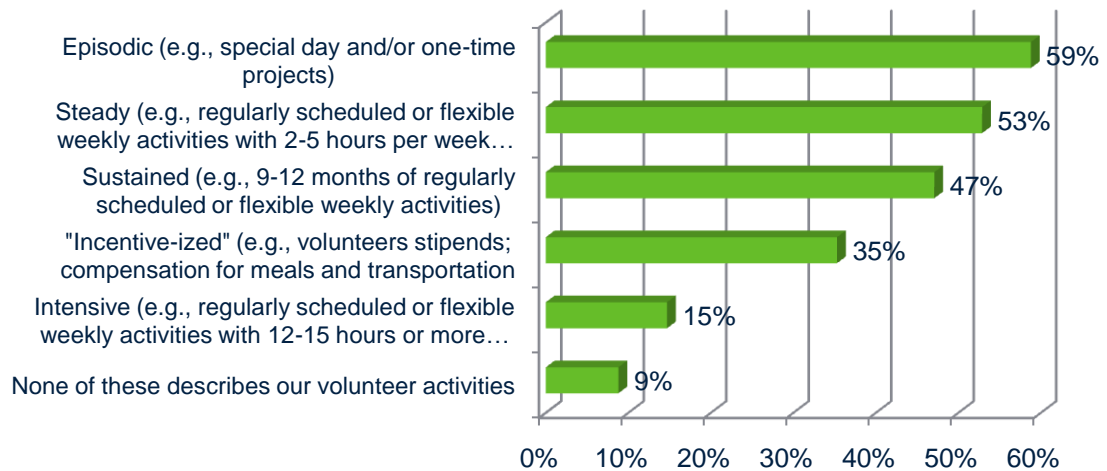
Is your state's volunteer program required by state or federal law?



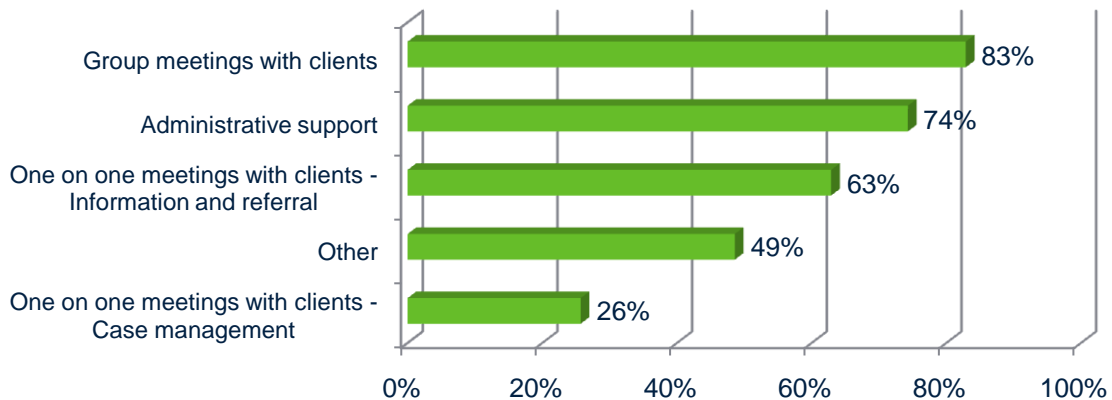
How many active volunteers does your organization currently have?



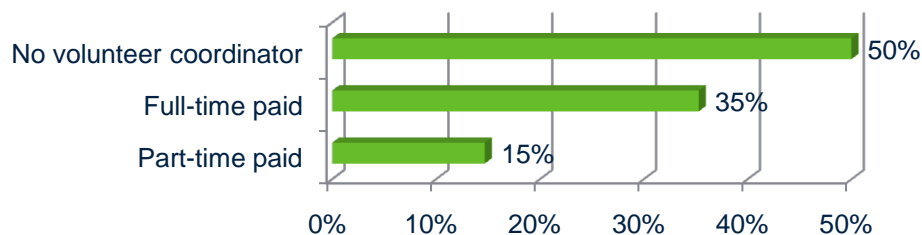
Which among the following choices represent volunteer opportunities within your organization? (Check all that apply.)



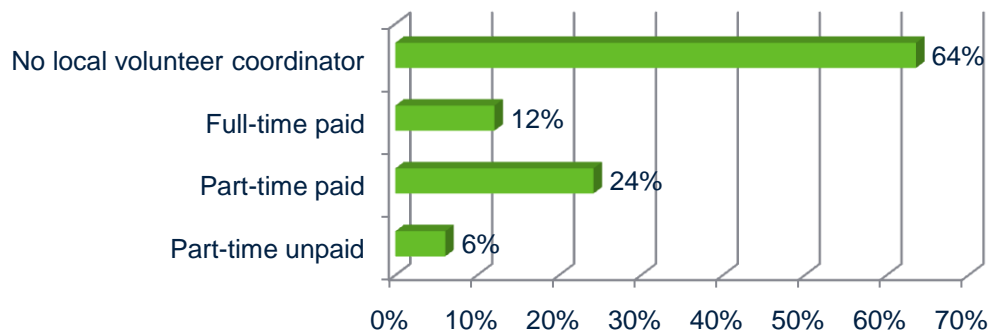
In what tasks do your volunteers in your organization (or program) participate?



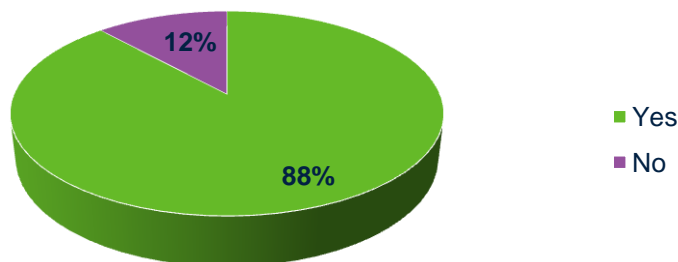
Does your organization have a statewide volunteer coordinator?



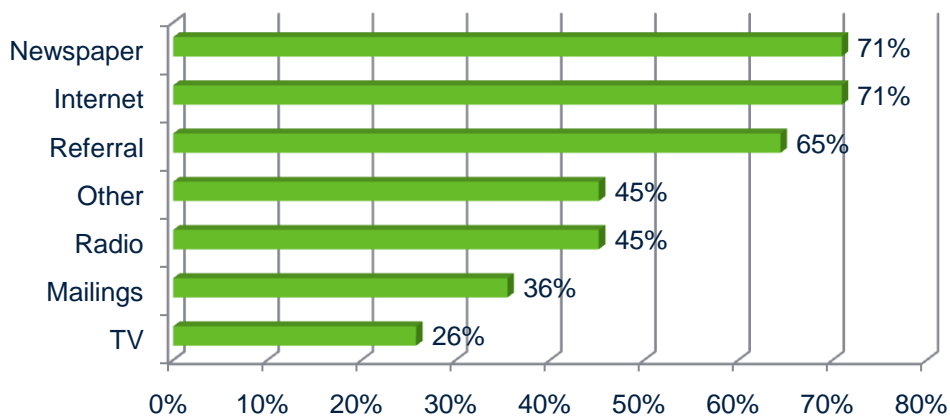
Does your organization have a local volunteer coordinator?



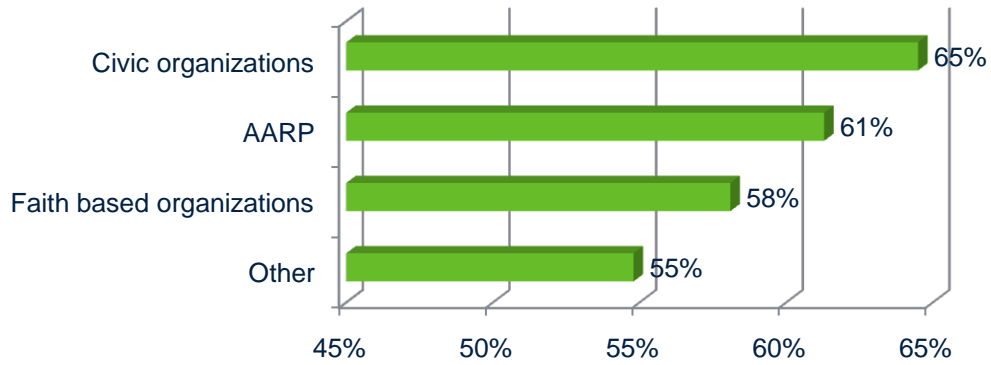
Does your organization advertise to recruit new volunteers?



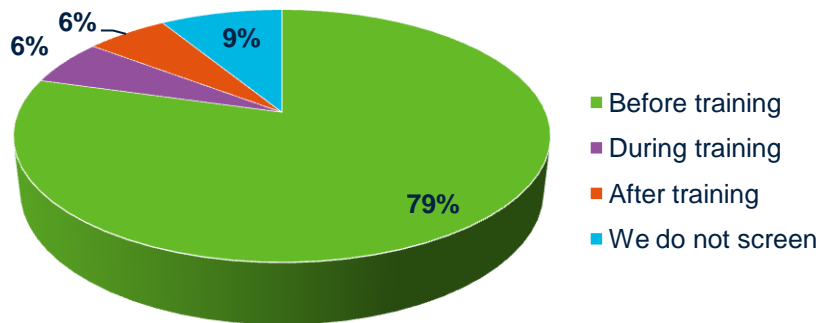
What medium do you use to advertise? (Check all that apply)



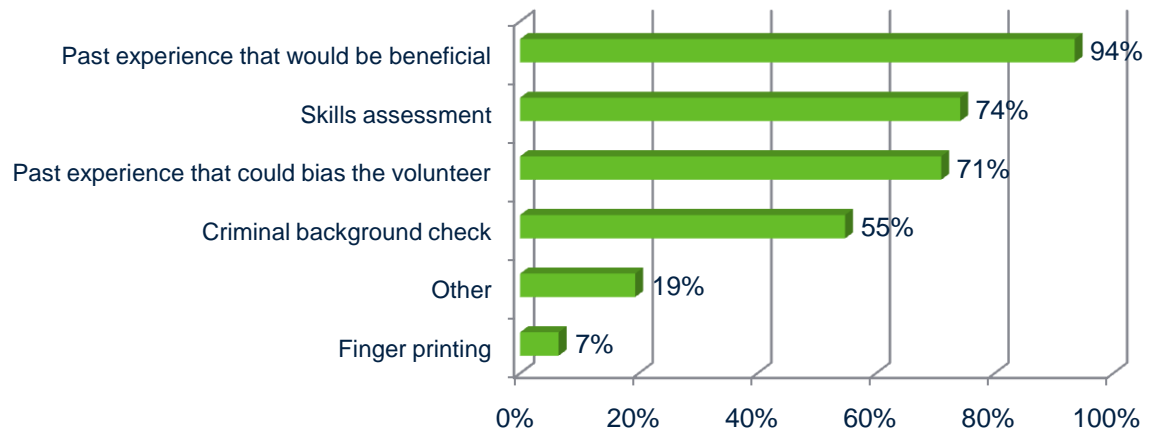
What other organizations does your organization use to recruit new volunteers? (Check all that apply)



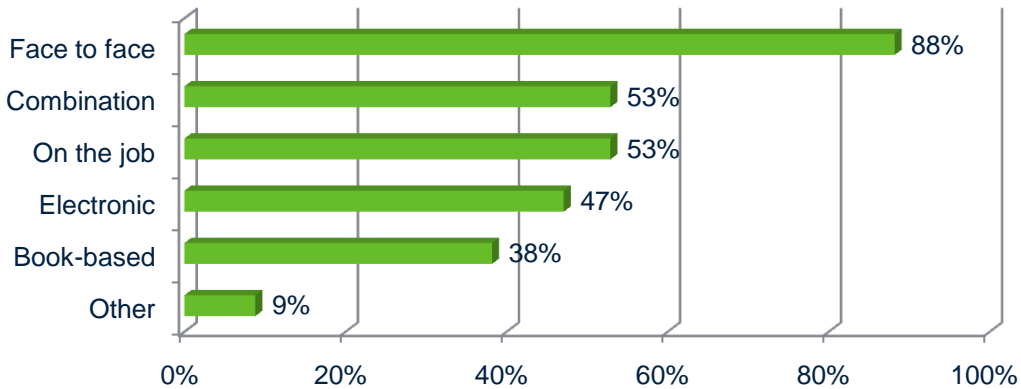
When does your organization screen potential volunteers?



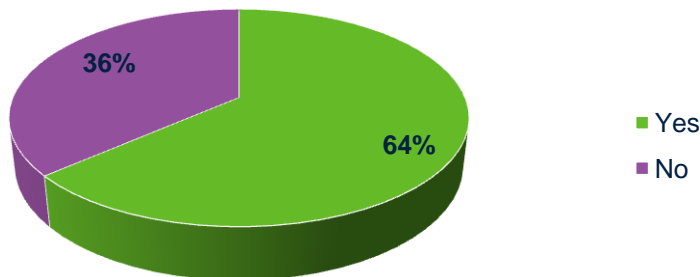
For what does your organization screen volunteers?



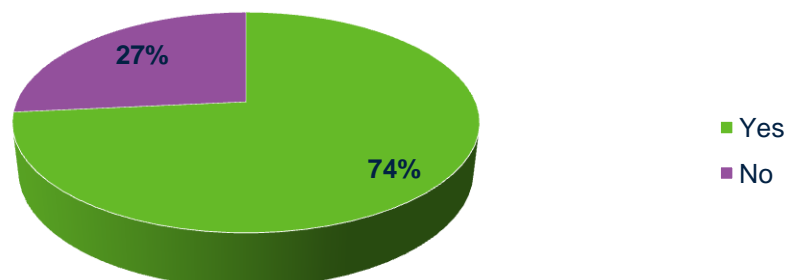
What kind of training does your organization provide?



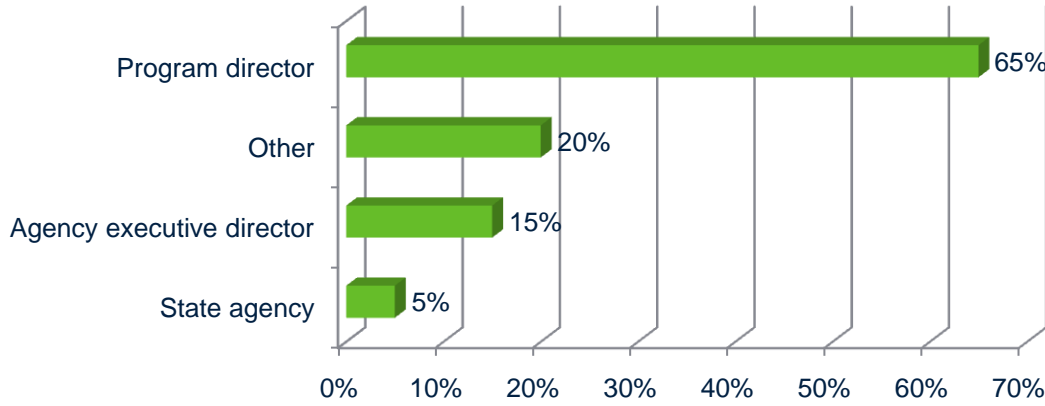
Is there a mentorship component of your organization's training program?



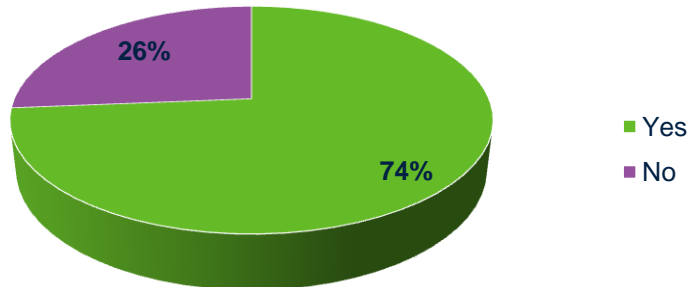
Does your organization certify volunteers after training is complete?



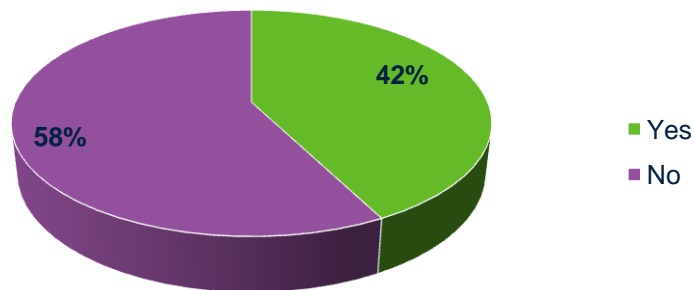
Who certifies your organization's volunteers?



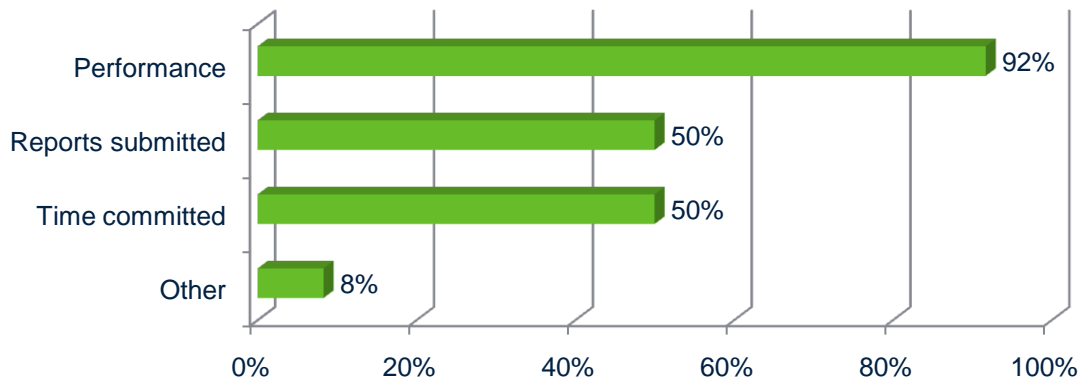
Can volunteers be de-certified if they are no longer meeting the standards of certification?



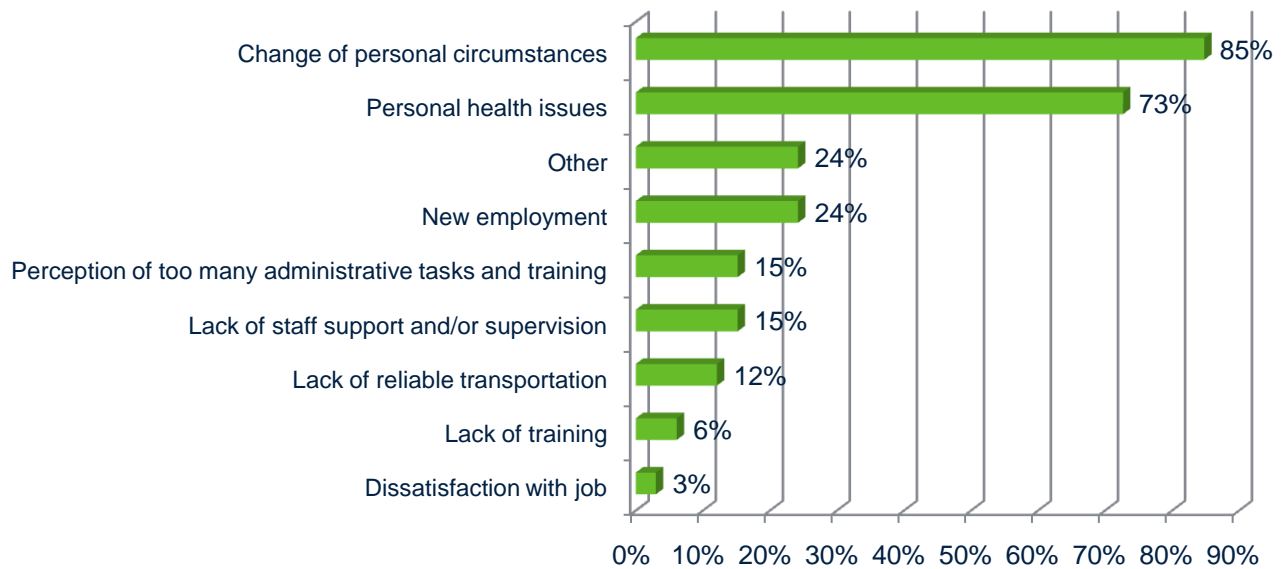
Do you evaluate your volunteers?



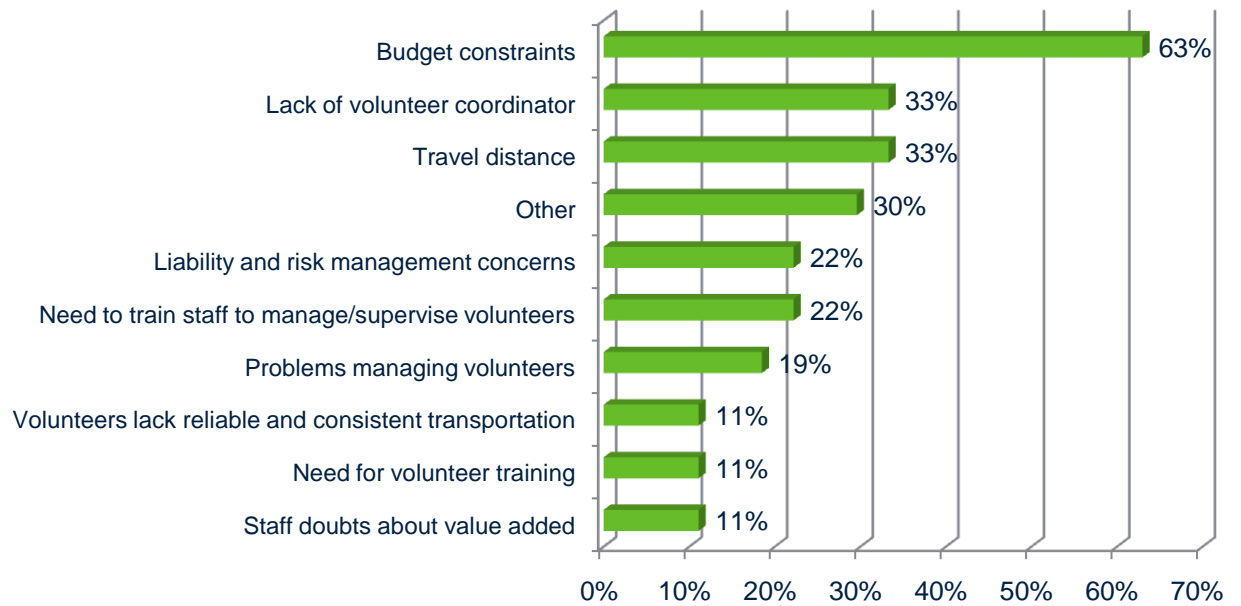
On what are volunteers within your organization evaluated?



What are the top reasons why volunteers leave your program?
(Check all that apply)



Which of the following barriers, if any, prevent your organization from developing service opportunities and roles for older adult volunteers? (Check all that apply)



Appendix 2: NASUAD Environmental Scan – Civic Engagement

1.) Your organizational level (select the best answer):

- Administrator/executive level
- Program director
- Volunteer coordinator

2.) Your name:

3.) Select your program

- Ombudsman
- SHIP
- SMP
- ADRC
- Other (Please describe)

4.) Your state

5.) Type of agency

- Part of the State Unit on Aging
- Part of other government agency
- Independent government agency
- Independent non-profit agency
- Other (Please explain)

6.) How long have you had a volunteer program?

- We do not currently have a volunteer program
(If you do not have a volunteer program, please stop here.)
- Less than 6 months
- 6 months – 1 year
- 1-5 years
- 5-10 years
- More than 10 years

7.) Is your volunteer program required by state or federal law?

Yes

No

8.) What is the funding source for your volunteer coordinator?

9.) What funding is available for your program?

10.) What agency funds your volunteer program?

11.) How many active volunteers does your organization currently have? *

Less than 25

25-49

50-149

150-300

More than 300

We have no volunteers in our organization

12.) Approximately, what percentage of your volunteers fall into each of the following age categories? (Percentages must equal 100%) *

18-39 years of age:

40-54 years of age:

55-64 years of age:

65-74 years of age:

75+ years of age:

13.) Since Baby Boomers overlap two of the above categories, can you estimate what percentage of your volunteers are between the ages of 47 and 65?*

14.) What percentage of your volunteers are male and female?

Male:

Female:

15.) Which among the following represent your volunteer opportunities? (Check all that apply.)*

Episodic (e.g., special day and/or one-time projects)

Steady (e.g., regularly scheduled or flexible weekly activities with 2-5 hours per week commitment)

Intensive (e.g., regularly scheduled or flexible weekly activities with 12-15 hours or more commitment)

Sustained (e.g., 9-12 months of regularly scheduled or flexible weekly activities)

* Part of the core questions developed by the National Association of Area Agencies on Aging

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- "Incentive-ized" (e.g., volunteers stipends; compensation for meals and transportation)
- None of these describes our volunteer activities

16.) In what tasks do your volunteers participate?

- Administrative support
- One on one meetings with clients - Information and referral
- One on one meetings with clients - Case management
- Group meetings with clients
- Other (Please Describe)

17.) Does your organization have a statewide volunteer coordinator?*

- Part-time unpaid
- Full-time unpaid
- Part-time paid
- Full-time paid
- No statewide volunteer coordinator

If part-time, what percentage of their time is spent as volunteer coordinator?

18.) Does your organization have a local volunteer coordinator?*

- Part-time unpaid
- Full-time unpaid
- Part-time paid
- Full-time paid
- No local volunteer coordinator

If part-time, what percentage of their time is spent as volunteer coordinator?

19.) We are interested in finding out about the infrastructure you provide or are thinking about providing for your volunteers. Please read the following ten statements and tell us to what degree the policy/practice has or has not been implemented.*

	Not implemented	Partially implemented	Fully implemented
a.) Regular supervision and communication with volunteers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b.) Liability coverage or insurance protection for volunteers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c.) Regular collection of information on volunteer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

* Part of the core questions developed by the National Association of Area Agencies on Aging

hours or numbers			
d.) Screening procedures to identify suitable volunteers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e.) Written policies and job descriptions for volunteers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f.) Recognition activities such as award ceremonies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g.) Annual measurements of impact/value of volunteer service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
h.) Training and professional development for volunteers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
i.) Training for paid staff in working with volunteers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
j.) Resource allocation to support volunteer programs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

20.) To what degree do your older adult (60+) volunteers... *

	Not at all (1)	(2)	(3)	(4)	Very much so (5)
...help you fulfill your mission and meet your goals?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...allow you to offer services you could not otherwise provide or fill gaps in service you already provide?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...save staff time and allow your staff to perform other duties?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

* Part of the core questions developed by the National Association of Area Agencies on Aging

...help you reduce the costs of providing services?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...increase visibility, build community understanding, and strengthen outreach?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...have the necessary experience and training to participate on your leadership teams, lead programs, and spearhead new initiatives?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

21.) Do you advertise to recruit new volunteers?

- Yes
- No

22.) What medium do you use to advertise? (Check all that apply)

- Newspaper
- Radio
- TV
- Referral
- Mailings
- Internet
- Other (Please explain)

23.) What other organizations do you use to recruit new volunteers? (Check all that apply)

- AARP
- Civic organizations
- Faith based organizations
- Other (Please explain)

24.) When do you screen potential volunteers?

- We do not screen
- Before training
- During training
- After training (Please describe)

25.) For what do you screen?

- Past experience that could bias the volunteer
- Past experience that would be beneficial
- Skills assessment
- Criminal background check
- Finger printing
- Other (Please explain)

26.) What kind of training do you provide?

- Face to face
- Electronic
- Book-based
- On the job
- Other
- Combination (Please describe)

27.) How many hours of training are required?

28.) Is there a mentorship component of your training program?

- Yes
- No

29.) Do you certify volunteers after training is complete?

- Yes
- No

If so, who certifies volunteers?

- Agency executive director
- Program director
- State agency
- Governor's office
- Other (Please explain)

Can volunteers be de-certified if they are no longer meeting the standards of certification?

- Yes
- No

30.) Do you evaluate your volunteers?

- Yes
- No

If so, on what are your volunteers evaluated?

- Performance
- Time committed
- Reports submitted
- Other (Please explain)

31.) Do volunteers submit reports?

- Yes
- No

If yes, are the volunteer reports the same as paid employee reports?

- Yes
- No

32.) What are the top three reasons why volunteers leave your program?

- Personal health issues
- Lack of reliable transportation
- Change of personal circumstances
- Lack of staff support and/or supervision
- Dissatisfaction with job
- Lack of training
- Lack of recognition
- New employment
- Perception of too many administrative tasks and training
- Other (Please explain)

33.) Which of the following barriers, if any, prevent your organization from developing service opportunities and roles for older adult volunteers? (Check all that apply.)

- Lack of volunteer coordinator
- Budget constraints
- Staff doubts about value added
- Need to train staff to manage/supervise volunteers
- Need for volunteer training
- Problems managing volunteers
- Liability and risk management concerns
- Volunteers lack reliable and consistent transportation
- Travel distance
- Other (Please specify)

34.) Does your agency have a cost analysis of volunteer work?

- Yes
- No

If yes, would you share your cost analysis model as an example with other organizations?

- Yes
- No

35.) What plans, if any, do you have to add to your volunteer base in order to capitalize on the assets and opportunities of the aging of the Boomers?

36.) How can the National Resource Center be helpful to you?



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