The Use of Volunteers in State Agencies on Aging and Disabilities

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NASUAD
National Association of States
United for Aging and Disabilities

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 generation. 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 in with 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 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 local and statewide 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 scan[1], 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) State Health Insurance Program (SHIP); 2) Senior Medicaid Patrol (SMP); 3) State Long Term Care (LTC) Ombudsman program; and 4) Aging and Disability Resource Centers (ADRC). NASUAD included both 'core questions' (questions in both NASUAD and n4a scans), and supplemental questions including in-depth state-specific questions about current volunteer program details and techniques for recruitment and retention. The purpose of the assessment is 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 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.

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[1] See Appendix for full NASUAD online scan

The <u>State Health Insurance Program (SHIP)</u> is a state-based program that provides local one-on-one counseling and assistance to Medicare beneficiaries and their families on Medicare and other health insurance issues. The goal of the program is provide beneficiaries with accurate, understandable, and objective health insurance information so they can make informed coverage decisions and understand their rights and protections[2].

The <u>Senior Medicaid Patrol (SMP)</u> 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.

The <u>State Long Term Care (LTC) Ombudsman</u> program serves as an advocate and resource for older adults who reside in long-term care facilities such as nursing homes, assisted living and board and care homes. The Long Term Care Ombudsman volunteers, known as "Ombudsmen," help residents and their families understand and exercise their rights to quality of care and quality of life. The Ombudsman program advocates for residents at both the individual and systems levels by receiving, investigating and resolving complaints made by or on behalf of residents. The program also promotes the development of resident and family councils, and informs governmental agencies, providers and the general public about issues and concerns impacting residents of long-term care facilities.

The <u>Aging and Disability Resource Center Program (ADRC)</u>, a collaborative effort of the Administration on Aging (AoA) and the Centers for Medicare & Medicaid Services (CMS), is designed to coordinate and streamline access to long-term services and supports.[3] AoA and CMS have defined five key operational functions to be carried out by ADRCs:

1) Information and referral/awareness (I&R/A);
2) Options counseling and assistance (OC);

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[2] State Health Insurance Assistance Program: http://www.nasuad.org/ship/ship.html
[3] *See* Section 102(4) of the Older Americans Act for a complete definition of the ADRC.

3) Streamlined eligibility determination for public programs and streamlined access to services;
4) Person-centered transition support; and
5) Quality assurance and continuous improvement.[4]

These four programs were chosen because NASUAD partners believed they would provide a view of the state's volunteer landscape. Each of the above programs rely heavily on highly trained volunteers, with comparatively greater time and energy commitments than other state and local volunteer programs. As reported in the assessments, the responsibilities of these specialized programs reflect the desires expressed by many Boomers for more challenging, high-level volunteer duties. The online scan was sent on March 2, 2011. It consisted of 36 primary questions including the core questions from the n4a assessment. The questions can be found in the Appendix of this document. Most of the ADRC respondents (96 percent) reported that their program did not use volunteers at the state level (though they do at the local level). Therefore, the ADRC online scan information will be excluded from most of the data reviewed in this document.

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 calls were one hour in length and held between April 4 and 7, 2011. The number of participants per call ranged from 18 to 30. During the conference calls, NASUAD presented program-specific findings from the online scan, and asked the state 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 national resource center.

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[4] U.S. Department of Health & Human Services, "Implementing the Affordable Care Act: Making it Easier for Individuals to Navigate Their Health and Long-Term Care through Person-Centered Systems of Information, Counseling and Access," June 2010; available at www.aoa.gov/aoaroot/Grants/Funding/docs/2010/AoA_CMS_Affordable_Care_Act_June_2010.pdf; and ADRC TAE, "Fully Functioning Aging and Disability Resource Centers," June 2010; available at www.adrc-tae.org/tiki-download_file.php?fileId=29618.

Results

Overall Results

Sixty-one percent of the state program directors scanned, representing 48 states and the District of Columbia, responded to the NASUAD online scan. Of the program directors who responded, 75 percent reported having a volunteer program. With the ADRC responses removed, this number increased to 91 percent.

The scan presented an overall view of volunteers within the SMP, SHIP and Ombudsman programs including a predominately female volunteer force, between the age of 65 and 74. Results indicate that volunteers participate in volunteer activities between two and five hours per week, and are most likely to work directly with clients, either one-on one-or in a group. Respondents indicate that state volunteer programs tend to be underfunded and understaffed; the majority of programs advertise to recruit new volunteers, mostly through newspapers or personal referrals; and volunteers are most likely to terminate their volunteer service for personal rather than programmatic reasons.

Online scan responses reveal that SMP, SHIP, and Ombudsman volunteers tend to be predominantly female (72 percent, compared to 27 percent male) (see Figure 1). Volunteers of state programs also tend to be between 65 and 74 years of age (46 percent of total volunteers). Overall, Baby Boomers (age 47 to 65) make up 44 percent of volunteers.

Figure 1: Gender Comparison of State Program Volunteers

27%
72%

■ Female
■ Male
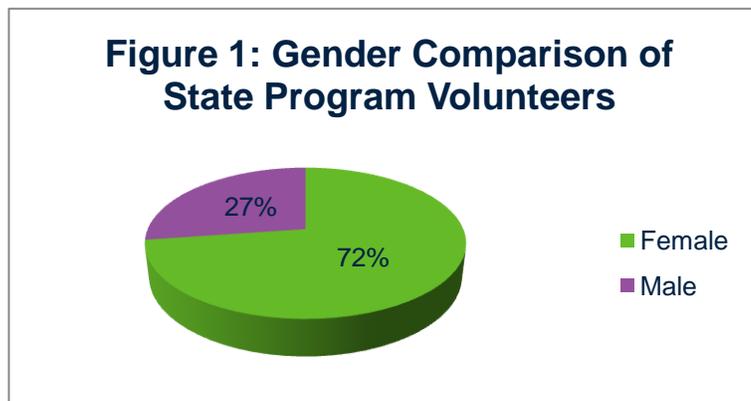
Responses indicate that 74 percent of volunteers participate in "steady" volunteer positions (regularly scheduled or flexible weekly activities with two to five hours per week commit- ment). Eighty percent of volunteers perform one-on-one

meetings with clients for information and referral; and 70 percent meet with clients in groups (See Figure 2).

Scan responses and conference call participants indicate that volunteer programs face many challenges. These were most likely to include the lack of funds and the resulting lack of a volunteer

Figure 2: Types of Volunteerism within State Programs

A bar chart showing percentages for four categories: One on One Meetings (I&R) approximately 80%, Group Meetings with Clients approximately 70%, Administrative Support approximately 65%, and Other approximately 45%.

coordinator. Sixty-four percent of directors reported not having a statewide volunteer coordinator, and 57 percent reported not having local coordinators (See

Figure 3). Funding depended on the program: 16 percent of SHIP programs reported having no volunteer funding, 5 percent of Ombudsman programs reported having no funding, and all SMP

Figure 3: Volunteer Coordinator Work

A bar chart comparing Statewide and Local categories for: Part-time unpaid, Full-time unpaid, Part-time paid, Full-time paid, and No volunteer coordinator. Legend: Statewide (green), Local (purple).

programs reported receiving federal funding through the Administration on Aging. Even those volunteer programs with steady funding reported funding shortages, which often results in the lack of a volunteer coordinator.

Because of the Boomer-specific aspect of the project, directors were asked whether their programs were planning for the recruitment and retention of Boomers. Forty-two percent of directors reported that they already had Boomer-specific plans. These include creating more flexible training and schedules for Boomers who may still be working or who want time for other activities; taking into consideration
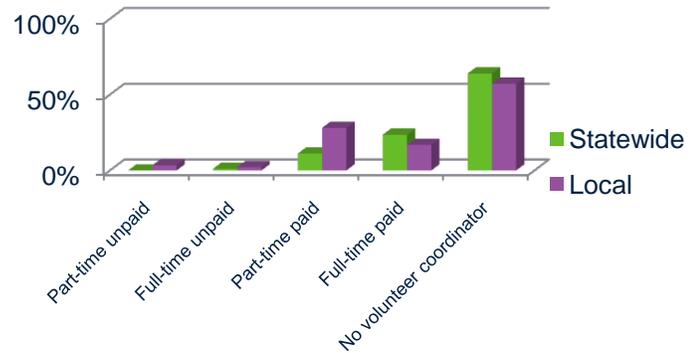
the unique skill sets of many Boomers; marketing for volunteers among current caregivers; and more computer-based trainings and tasks.

Nearly all of the directors who responded (90 percent) say their programs advertise to recruit volunteers. This advertisement varies greatly among programs: newspaper, referral, and internet were the most used advertising tools (See Figure 4). Facebook, Twitter, and other social networking sites are under consideration for recruiting Boomers, given their higher use of technology in comparison to older volunteers. Program directors also reported using other organizations to advertise their volunteer opportunities: 57 percent use AARP, 69 percent use various civic organizations, and 65 percent use faith based organizations.

Figure 4: Methods of Volunteer Recruitment
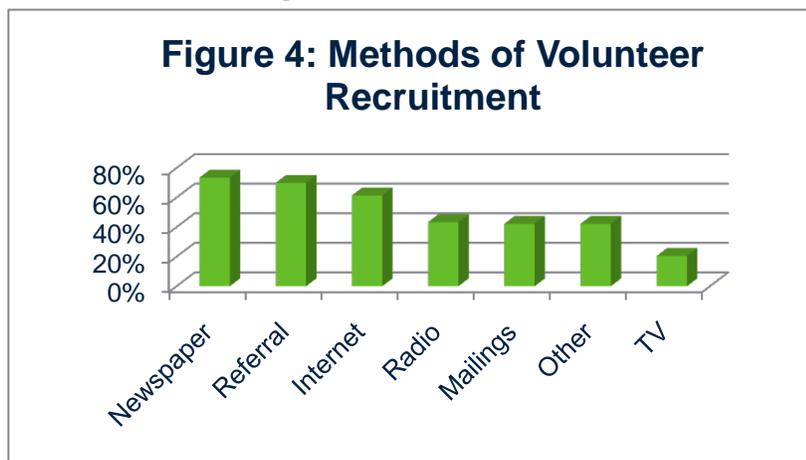
Another series of questions included in the online scan addressed the retention of volunteers, as understanding the reasons why volunteers leave a program is necessary for improving retention. The top reasons cited for termination of volunteer service were "change of personal circumstances" (82 percent) and "personal health issues" (74 percent). Other reasons for volunteers choosing to end their service are listed in Figure 5. The

Figure 5: Reasons for Volunteer Choice to Terminate Service
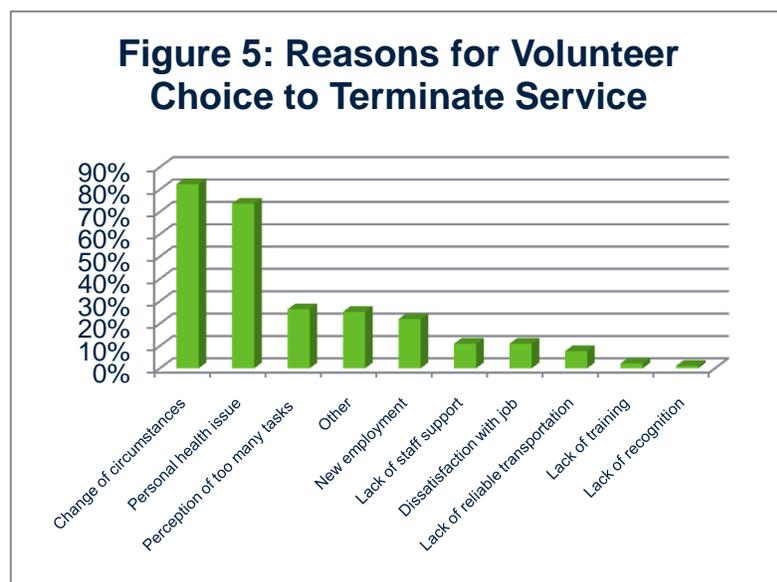
results indicate that the most frequent indicators for termination of volunteer service are often not programmatic, but personal.

Program Specific Results

State Health Insurance Program (SHIP)

SHIP volunteers provide counseling and assistance to Medicare beneficiaries and their families on Medicare and other health insurance issues. SHIP volunteers undergo an intensive training process to teach them the details of Medicare and other health insurance programs, so they can best serve their clients. The volunteers meet with clients one-on-one or in groups to help the clients make the best health care decisions, and to explain different options.

The SHIP volunteer program results in the NASUAD online scan differ from other programs in several ways. Of the four programs, SHIPs were the most likely to have a volunteer program: 95 percent of SHIP directors who responded indicated that their programs have volunteers, compared to 75 percent overall.   They also have the largest programs: 32 percent of SHIP directors who responded have over 300 volunteers in their programs, compared to 18 percent overall. SHIPs also have volunteers who contribute the greatest amount of time: responses indicate that 53 percent of volunteers participate in "intensive" volunteerism (regularly scheduled or flexible weekly activities with 12-15 hours or more of time committed) compared to 27 percent overall. Responses show that SHIPs also have the greatest percentage of programs led by local volunteer coordinators: 75 percent of SHIP respondents have local volunteer coordinators, compared to 45 percent overall. The greatest challenges reported by SHIP directors stemmed from the complexity of the subject matter with which they work; directors reported volunteers leave the program because of difficulty with the volume of training material and the perception of too many administrative tasks.

The conference call held with SHIP directors after completion of the online scan gave them the opportunity to report further on their programs. In discussing Boomer volunteers, the SHIP directors noted that Boomers provide new opportunities as well as challenges for volunteer programs. While Boomers are more likely than older volunteers to have increased computer skills and professional experience, SHIP directors anticipate a greater need for a detailed job description,

the need for more staff support, and the desire for a job with capacity-building aspects. Many directors reported that some of their best volunteers come to them first as the caregivers for clients then transition into a volunteer role. These caregivers increasingly include Boomers.

When asked about the effects of the economic downturn on the volunteer programs, one director relayed that many newly unemployed individuals came to the program as a way to improve their resumes and network their way into a new job. The pattern for this type of volunteer is to complete the rigorous SHIP training process, then drop out of the program as soon as he or she finds new employment. Another director noted that to avoid new employment as a barrier to retention, her program has a one year requirement for volunteers. Volunteers unwilling to make a full one year commitment are assigned to work on administrative tasks or short-term projects instead of completing the full SHIP training.

The biggest challenges the SHIP directors reported are the complexity of the SHIP volunteer work and the amount of time expected of volunteers. Many directors commented that their volunteers are dissatisfied with the amount of paperwork and the ever-increasing demands of the program, which often lead to decreased volunteer retention and satisfaction.

The directors had several ideas for a new national volunteer resource center and how it could help them. One idea was a nation-wide assessment of the in-kind value of volunteer work that takes into account the complexity of the work that SHIP volunteers do. The assessment could translate work completed into a monetary amount to be used for comparison, funding and policy purposes. Another idea was for the new national resource center to provide a set of job descriptions for volunteer programs to be shared so directors could more easily recruit for these positions and more effectively use their coordinator. They also discussed the possibility of a library of effective models for utilizing volunteer coordinators. In addition, they suggested access to a collection of operational models for managing volunteers. Another request made was assistance with performing background checks, as many programs reported a lack of funds to properly screen potential volunteers.

Senior Medicare Patrol (SMP)

SMP volunteers are also highly trained in the details of Medicare. They are taught about the health care system in general, and how to recognize and report fraud. These volunteers help to protect the Medicare system by seeking to reduce fraud and empowering others to identify and report fraud. SMP volunteers are often retired professionals with an interest in Medicare and helping others.

The SMP directors' responses to the NASUAD online scan reveal several ways in which the SMP program differs from other programs. SMP programs are more likely than other programs to be located within an independent nonprofit organization: 43 percent of SMP respondents indicated this, compared to 17 percent overall. SMP programs also had the most consistent funding source: an SMP grant from the Administration on Aging. They currently have the lowest percentage of Boomer volunteers (36 percent, compared to 46 percent overall), but SMP directors participating in the conference explained that they are interested in increasing their numbers of Boomer volunteers. SMP program volunteers, while still overwhelmingly female (the SMP average response was 30 percent male and 67 percent female), were more likely than the other volunteer programs to report more male than female volunteers; several SMP programs reported up to 70 percent male volunteers. SMP volunteers are more likely to participate in administrative tasks (responses indicate that 74 percent of volunteers participate in these tasks, compared to 61 percent overall) or group meetings with clients (83 percent, compared to 72 percent overall). They also had more statewide volunteer coordinators (50 percent of SMP directors reported having no statewide coordinator, compared to 62 percent overall), which is related to federal funding from the Administration on Aging. The greatest challenges for SMP programs reported by directors are volunteer transportation, and training volunteers to understand the complexity of the subject matter.

When asked in the conference call about recruitment, SMP directors mostly highlighted their programs' use of technology and community. One director reported that her program purchased a professionally designed website, which was very successful at recruiting committed volunteers. Other directors discussed the use of social media, especially Facebook, and their success using the site to recruit

younger, Boomer volunteers. One director reported that the program in her region allowed volunteers to work in their own community; because of the client trust and geographic accessibility offered by the community-based strategy, volunteers could reach more older adults. Another director reported that her state has a program in which management of large apartment buildings with a high number of older adults, recruits SMP volunteers to act as the voice of the building, as whistle blowers and advocates for the residents.

Directors reported that Boomer volunteers often become interested in working for SMP programs because they were previously the victims of fraud, and are therefore committed to the program to help protect others from the experience of victimization. Directors also reported that Boomers tend to be better educated than older generations of volunteers, want an opportunity to learn and to grow, and have a vested interest in protecting Medicare for themselves, as they near eligibility.

The economic downturn has led to staffing shortages, but several directors reported opportunities that had grown out of those staffing challenges. One state hired several part-time employees who are over 65 and extremely dedicated to their work. In the absence of a volunteer coordinator, another state hired former volunteers to serve as volunteer management support assistants. Because of their experience as volunteers, these individuals were well-suited for the job and less costly than a paid coordinator.

In addition to their current SMP national resource center, directors suggested that the new national volunteer resource center help them with criminal background checks and a national advertising campaign that would target all volunteer programs. They pointed out that some national organizations that had provided recruitment avenues in the past have discontinued their services. Directors suggested reintroducing advertising mailings as a way to advertise volunteer opportunities.

State Long Term Care (LTC) Ombudsman

Ombudsman volunteers serve as advocates for individuals living in long-term care facilities, such as nursing homes, assisted living facilities, and board & care homes. Ombudsman volunteers generally talk with residents of LTC facilities and their caregivers, seeking to identify and solve issues of abuse, fraud, or other complaints. Ombudsman volunteers advocate for the rights of residents, and teach residents and caregivers about their rights to high quality care and the best possible quality of life.

The State Long Term Care Ombudsman program results from the NASAUD environmental scan showed that Ombudsman programs tend to have older volunteers in comparison to the other reviewed programs: 65 percent of responses indicated that their Ombudsman program is over ten years old, compared to 45 percent overall. Ombudsman programs also have the highest rate of Boomer volunteers: responses indicate that Boomers make up 52 percent of Ombudsman volunteers and 46 percent overall. Ombudsman programs are the least likely to have volunteer coordinators at the state or local level: 72 percent of respondents indicate that their programs do not have statewide volunteer coordinators and 68 percent do not have local volunteer coordinators, compared to the overall results: 62 percent and 55 percent respectively. Ombudsman directors also report great volunteer satisfaction within their programs; they listed higher levels of implemented policies and more perceived benefits by volunteers than the aggregate.

In the conference call state Ombudsman directors discussed ideas on recruitment of new volunteers. Several states were disappointed at the loss of recruitment assistance from national organizations but said that some local chapters do similar mailings for their regions. The best way to recruit quality volunteers, according to several directors, is to print real-world stories about Ombudsmen volunteers in newspapers and other local publications.

Also on the conference call, directors reported a high rate of Boomer volunteers already active in the Ombudsman programs. One director suggested that all Boomers cannot be considered together, as there is a great deal of variation among this group. The director described a particular type of Boomer volunteer that is

most likely to be a successful Ombudsman: someone who is more focused on social justice and human rights, has higher energy levels, and is more aggressive, professional, and proactive than older Ombudsman volunteers. Directors reported that Boomer Ombudsmen provide some unique challenges as well, including dissatisfaction with the perceived slow pace of the training process, and a tendency to use their professional skills in a manner that is outside the scope of the Ombudsman job description. Directors discussed the need for a more defined role for Ombudsman volunteers.

Ombudsman directors discussed current program needs that the Ombudsman resource center cannot provide, and suggested ways in which the new national volunteer resource center could help fill the resource gaps. The Ombudsman directors reported needing a method for states to exchange ideas and best practices within different (non-Ombudsman) volunteer programs. They also discussed a need for a national advertising campaign on volunteerism that would have the potential to grow the general volunteer base.

Volunteer Resource Centers

SMP, SHIP, and Ombudsman programs are already supported by their own national resource centers; however respondents had additional ideas for how a national volunteer resource center could assist their programs. These ideas included sharing resources; advertising; help with budgeting and funding; compiling a library of best practices; and providing staff training. Several directors suggested that the new resource center include a national advertising campaign for volunteerism in general, specifically targeted at Boomers, and/or keeping a library of pre-made generic advertising materials that a program could use after modifying by state, locale and population.

Conclusions

Overall, volunteer programs are facing the difficulty of the current economic climate through the lack of funds and staffing issues. They are, however, looking forward to the incoming surge of possible volunteers. Directors of state programs anticipate the approaching retirement of the Baby Boom generation as an opportunity to in which they will hopefully gain access to a new group of volunteers whom they expect will be educated and motivated with a desire to do more difficult, technical and complex tasks than older volunteers. The program directors report that with the influx of possible volunteers comes an increased need for volunteer managers, funding, and support for their programs.

The assessment, including an online scan and conference call discussions completed by NASUAD, provided many ideas that will be useful in the creation of the National Resource Center, especially with respect to the expanded recruitment and retention of Boomer volunteers. The description of Boomer volunteers by directors of three national programs produced reports of both opportunities and challenges that should be taken into consideration. Opportunities included common Boomer traits which differ from traits of older volunteers such as strong computer skills, a high level of professionalism, energy, professional skills, and education. Recruitment of Boomers is often made easier because many they find out about volunteer opportunities through care giving for an aging parent, or by experiencing personal Medicare fraud. They also have a vested interest in learning about Medicare and protecting it from fraud because they are, or soon will be, eligible for Medicare.

In order to recruit and retain Boomer volunteers each of the volunteer programs must adapt. The forthcoming National Resource Center is intended to assist in this adaptive process. Directors' ideas for the new resource center include creating and making available a library of volunteer job descriptions, a list of best practices for using volunteer coordinators, models for successful volunteer management, and a way to exchange best practices among different volunteer programs relating to volunteer recruitment and retention. Assistance from a national resource center in

increasing funding, conducting background checks, and providing assistance with a national advertising campaign were requested by every program group.

The baseline information gathered by NASUAD will continue to be assessed and compared to further data collected over the three year grant period. The suggestions of directors submitted in both the online scan and conference calls will be taken into consideration by the grant partners in the development and implementation of the National Resource Center.

Appendix: 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)

☐ "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

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

☐ 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	☐	☐	☐
b.) Liability coverage or insurance protection for volunteers	☐	☐	☐
c.) Regular collection of information on volunteer hours or numbers	☐	☐	☐

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

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?	☐	☐	☐	☐	☐
...allow you to offer services you could not otherwise provide or fill gaps in service you already provide?	☐	☐	☐	☐	☐
...save staff time and allow your staff to perform other duties?	☐	☐	☐	☐	☐
...help you reduce the costs of providing services?	☐	☐	☐	☐	☐
...increase visibility, build community understanding, and strengthen outreach?	☐	☐	☐	☐	☐
...have the necessary experience and training to participate on your leadership teams, lead programs, and spearhead new initiatives?	☐	☐	☐	☐	☐

21.) Do you advertise to recruit new volunteers?

☐ Yes

☐ No

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

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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