



# A Guide for Organizing Elder-Friendly Neighborhoods with Community Volunteers

Washtenaw County, Michigan

January 2009

Published by the Blueprint for Aging, this guide is a resource for community leaders and volunteers who want to improve quality of life for seniors living in their neighborhoods.

[www.BlueprintForAging.org](http://www.BlueprintForAging.org)

## Acknowledgement

The Blueprint for Aging, a collaborative of seniors, family members, nonprofits, businesses, and government agencies working to improve services, care, and quality of life for older adults in Washtenaw County, is supported by a Community Partnerships for Older Adults grant from the Robert Wood Johnson Foundation and local funding from Ann Arbor Area Community Foundation, Washtenaw County, and Catholic Social Services.

### **Blueprint for Aging Core Leadership Members 2007-2008**

Anya Abramzon	<i>Jewish Family Services</i>
Frank Cambria	<i>Civic Member</i>
<i>Chairperson</i>	
Phil D'Anieri	<i>Ann Arbor Area Community Foundation</i>
Diane Davidson	<i>Washtenaw County Housing Alliance</i>
Gloria Edwards	<i>UM Program for Minority Health</i>
Dale Fitch	<i>UM School of Social Work</i>
Joanne Grosh	<i>Chelsea Community Hospital</i>
Carolyn Hastings	<i>Housing Bureau for Seniors</i>
Mark Lindke	<i>Washtenaw County Veteran Affairs</i>
Hans Maier	<i>Bank of Ann Arbor</i>
Sherry Marcy	<i>Civic Member</i>
John Martin	<i>Civic Member</i>
Tina Abbate Marzolf	<i>Area Agency on Aging 1-B</i>
Barbara Penrod	<i>Neighborhood Senior Services</i>
Ray Rabidoux	<i>Glacier Hills Retirement Community</i>
Darlene Racz	<i>University of Michigan Geriatric Clinic</i>
Donna Saborin	<i>Washtenaw County CSTS</i>
Ingrid Sheldon	<i>Civic Member</i>
Sharon Sheldon	<i>Washtenaw County HIP</i>
Larry Voight	<i>Catholic Social Services</i>

### **Blueprint for Aging Staff**

Jill Kind	<i>BFA Director</i>
Virginia Boyce	<i>BFA Project Manager</i>
Rachel Dewees	<i>BFA Pilot Project Coordinator</i>
Amy Ruddock Bleed	<i>BFA Pilot Support Specialist</i>

### **Blueprint for Aging Evaluator**

Sue Ann Savas	<i>University of Michigan</i>
---------------	-------------------------------

### **Workgroup Partners**

The Blueprint for Aging wishes to acknowledge and thank workgroup members who contributed critical expertise and guided the pilot project to implementation.

Kristine Ajrouch	<i>Eastern Michigan University</i>
Justine Bykowski	<i>Housing Bureau for Seniors</i>
Berit Ingersoll-Dayton	<i>University of Michigan</i>
Emily Farber	<i>UM School of Social Work intern</i>
Al Feldt	<i>Civic Member</i>
Tara Griffith	<i>Neighborhood Senior Services</i>
Joanne Grosh	<i>Chelsea Community Hospital</i>
Rachel Hewitt	<i>UM School of Social Work intern</i>
Amy Smyth	<i>Area Agency on Aging 1-B</i>
Julie Young	<i>Turner Geriatric Clinic</i>
Barbara Zaret	<i>Turner Senior Resource Center</i>

## Organizing for Elder Friendly Neighborhoods

I.	Background	4
II.	Getting Started	6
	Assessing Neighborhood Interest	6
	Type of Neighborhood and Impact on Implementation	9
	Selecting Community Volunteer Leaders	11
	Support & Training	12
III.	Outreach & Marketing	20
IV.	Record-Keeping and Evaluation	21
V.	Checklist for Success	24
VI.	Orientation & Training Information	25
VII.	Project Forms	
	<i>Community Resources Survey</i>	8
	<i>Community Volunteer Job Description</i>	13
	<i>Orientation Agenda</i>	16
	<i>Confidentiality Agreement</i>	19
	<i>Contacts Record Sheet</i>	23
VIII.	List of Washtenaw County Resources	26
IX.	Conclusion	28

## I. Background

Research overwhelmingly demonstrates that seniors want to age in place. A 2003 AARP study found that nearly 90% of Americans aged 60 and older want to stay in their current homes for the remainder of their lives. And, although



assisted living services or nursing care often becomes necessary in later life, few people happily envision aging in a senior care facility. The emotional impact and high financial burden of institutional care make aging in place an attractive and cost-effective option. Service provider data show that the medical decline of seniors accounts for only a portion of those moving to higher levels of care. Surprisingly, home support services such as housekeeping and chore work, transportation for errands, home delivered meals and companionship often determine a senior's ability to age in a familiar neighborhood.

An increasingly large portion of our population will face these challenges. A 2002 report from the Southeast Michigan Council of Governments (SEMCOG) projects that Washtenaw County is in the beginning stage of sustained rapid growth in numbers of older adults. Between 2000 and 2030 the county's 65-plus population is projected to triple in size, from about 26,000 to nearly 73,000, representing 16% of the population. Considering that current needs outpace existing resources, planning for the future is crucial. Locally, as well as across the country, many people have begun a conversation to address older adult needs in collaborative, community-based ways.

With these challenges in mind, the Blueprint for Aging (BFA) was formed and funded by the Robert Wood Johnson Foundation through their Community Partnerships for Older Adults program. The Blueprint for Aging is a collaborative of seniors, family members, nonprofits, businesses, and government agencies working to improve services, care, and quality of life for older adults in Washtenaw County. Testing innovative, community-centered service models to enhance aging in place comprises one of four project initiatives. This guide examines the Community Volunteers project that employed new ideas as well as concepts from international models of community support networks.

In 2001, Beacon Hill Village, a grass roots model from Boston, brought to the forefront neighbors helping neighbors stay in their homes. Members in Beacon Hill Village pay an annual fee and enjoy a set of services including transportation and cultural events, as well as access to information regarding vetted services such as home repair or home healthcare. Significant national media coverage of the Boston project, a how-to manual, and an annual Village Model conference

have encouraged the emergence of similar programs in other parts of the country.

In the 1990's, Leelanau County (Northern Michigan) seniors who wanted help each other stay in their homes began a program called ShareCare. This ShareCare network of seniors provides a range of options according to individual need and preference. Core elements of membership include nurse visits for assessment and monitoring, volunteer transport, and vetting of commercial services.

Successful program models such as these continue to grow and inspire other communities. A middle-income neighborhood in Ann Arbor has formed an intergenerational co-op with member neighbors exchanging co-op "dollars" for volunteer services. Two other neighborhoods began development of models: one affluent with single-family dwellings, the other a subsidized high-rise apartment building. The more affluent neighborhood was derailed after months of planning by concerns about liability issues. Residents of the subsidized high-rise are in the beginning stages of organizing their own support model.

A key component of model development is *access to information*. Findings from BFA focus groups, one-on-one interviews and a countywide priorities survey support this principle. When seniors were asked to list the most challenging aspects of aging in place, respondents indicated lack of knowledge of available services, lack of understanding of how to access them, and a low level of trust in social service systems.

#### **Aging in Place Concerns of Seniors**

1. Resource awareness
2. Access to services
3. Trust in the system

In response to this finding, the Community Volunteers project was developed with the assumption that *improved access to supportive services promotes aging in place*. This BFA project was designed to train two residents (no age criteria) in four Washtenaw County neighborhoods to serve as trusted, familiar, and knowledgeable contacts for older adults living in their communities. BFA issued a request for proposals, "Invitations to Serve," to various groups and neighborhoods. As applicants defined their own neighborhoods, four distinct types were selected:

- A senior center serving a mix of small town, rural and city residents in the Lincoln School District
- A racially diverse Ann Arbor neighborhood with a mix of homeowners and renters, made up of long-time residents and relative newcomers
- A racially diverse and geographically isolated (bound by three limited access roads) neighborhood in Ypsilanti with a strong core of residents dedicated to improving both the neighborhood and historical negative perceptions
- A largely white, middle-income rural church congregation outside a small town

Two training sessions were held with volunteers that included best practice methods to reach seniors and to relay information about resources and services. Community Volunteers in the four participating neighborhoods then spoke with residents about their needs and concerns. Program developers expected that Community Volunteers, with new skills and knowledge of resources, would increase connections among residents, creating a culture in which asking for help felt more comfortable. For example, a senior needing her walk shoveled might find it easier to inquire about paying a teenager a modest sum or ask about agencies providing this service from a Community Volunteer she knew to be knowledgeable and helpful.

Data collected during the 12-month Community Volunteers project provided information regarding neighborhood response to this model, including the effect of outreach efforts, working styles, and impressions of the Community Volunteers themselves. The purpose of this guide is to share our successes and challenges with other communities interested in developing neighborhood-based approaches for supporting seniors in their homes.

## **II. Getting Started**

### **Assessing Neighborhoods**

As you begin, it is important to have an understanding of your neighborhood -- community demographics, neighborhood needs, and resident preferences. How many seniors live in the neighborhood? What supports are already in place, such as family or agency involvement? Do seniors believe increasing options for help now, or in the future, would increase their ability to remain in their homes? Do other members of the community embrace the idea of helping seniors remain a part of their neighborhood, and do they want to participate? Does the neighborhood recognize a collective response to the needs of its senior members as important? Ownership of shared values regarding approach is crucial.

In assessing your neighborhood, it is important to have a clear understanding of the needs of residents and strengths of the community. What are seniors most concerned about? Is there strong evidence of neighbors helping neighbors, or do people keep to themselves? What features are, or have the potential to be, supportive of seniors? Do community centers, churches, and parks flourish? Are there barriers to aging in place, such as impaired access to buildings or broken sidewalks? How easy is it to use public transportation? Are there other transportation options? Are there grocery stores nearby? Will they deliver groceries? Are there other neighborhood-specific strengths and challenges? Most importantly, what do people *want*, and what will they *use* in terms of supports? Also, if it is to be a reciprocal community model, what are residents willing to *give*?

When you feel you have a good assessment of your community and its residents, it is time to launch the idea of Community Volunteers. Presentations at neighborhood association meetings and church services as well as informal conversations with people at coffee klatches or while waiting in line at the grocery store are good ways to gauge neighborhood interest. This is an ideal opportunity to identify members who may want to get involved in an organizational capacity. Depending on the size of the neighborhood, a short, simple and easy-to-return survey of all residents can measure both level of interest and priorities.

One Community Volunteer neighborhood developed a survey of skills, abilities, and interests of its residents designed to support seniors needing assistance. Neighbors (in this case, congregation members) agreed to be contacted when another congregation member needed a service they could potentially supply. Neighbors always had the option of declining any request. Resident responses gave a good sense of the neighborhood's internal strengths as well as a concrete way of matching those in need with those willing to help.

A Community Resources Survey follows this page and can be adapted to your neighborhood's needs.

## Community Resources Survey

Name \_\_\_\_\_ Phone \_\_\_\_\_

Address \_\_\_\_\_ Email \_\_\_\_\_

Best time to contact \_\_\_\_\_ Preferred method of contact \_\_\_\_\_

Typical times available for volunteering \_\_\_\_\_

**Ways I would like to help when there is a need in our community:**

	Transportation		Dental services
	Prepare meal		Nutrition services
	Deliver meal		Mental health services
	Childcare in my home		Legal advice or services
	Childcare in other home		Home maintenance assistance (snow removal, minor repairs, etc.)
	Escort to medical appointments		Yard work (weeding, mowing, etc.)
	Accompany to "run errands" (haircut, groceries, etc.)		Spiritual support (prayer, visits, bible reading, etc.)
	Companion visits		Temporary housing
	Respite care		Tutoring
	Medical services (doctor, nurse)		Other:

*A Community Volunteer may contact me when there is a need for assistance in our community. I know I am under no obligation to provide services and will determine if I am able at the time of the need. I give permission for this information to be included in a neighborhood Resource Manual.*

**Signature** \_\_\_\_\_ **Date** \_\_\_\_\_

Please notify a Community Volunteer if you wish information to be removed or changed.

**Your Community Volunteers:**

Name \_\_\_\_\_ Contact information \_\_\_\_\_

***Thank you for sharing your gifts with others!***



## **Type of Neighborhood and Impact on Implementation**

### Neighborhood Characteristics

The Blueprint for Aging Community Volunteers project involved four unique neighborhoods: a senior center, a church congregation and two geographically defined communities. Research concluded that type of neighborhood had significant bearing on success (the number of people helped), ease of outreach, and sense of satisfaction among volunteers.

*Geographic Neighborhoods:* In the BFA project, merely living in the same geographical neighborhood did not make people more willing to call a Community Volunteer. Results demonstrated that in each of the two geographically defined neighborhoods there were very few calls asking for information or help. Community Volunteers in neighborhoods, defined by pre-existing social networks had a much easier time getting the word out. Neighborhood members showed more interest and were more accepting of assistance and information. This helped boost a sense of accomplishment and purpose among the volunteers – *crucial* to a rewarding volunteer experience.

Size of neighborhood may also affect requests for help. In larger neighborhoods, residents demonstrated low levels of trust; and, consequently, Community Volunteers found it difficult to build relationships. Simply identifying Community Volunteers in a large neighborhood did not mean that neighbors would turn to them for help. One community member and neighborhood association officer (not a Community Volunteer) in one of the project neighborhoods explains:

On reflection, it seems that there is a kind of isolation as families seem to stand alone -- how do people get their information? How do folks know who to trust and who are they willing to trust? What kind of communication is best? This is an ongoing debate in our board. Our newsletter flyer is a throw of the dice in hopes that someone will see something there that meets their need and will come to a meeting! Maybe it is the old message, 'I am safe and this is familiar and I don't want to rock it!'

*Network Neighborhoods:* Project neighborhoods with pre-existing faith-based or senior activity-oriented networks had greater success with the Community Volunteers model than geographic neighborhoods. A list of important qualities found in network neighborhoods follows and includes a discussion of ways you can apply this information to your own project.

## Network Neighborhood Characteristics

- **Clear physical hubs** of activity, information, and human contact with the neighborhood. Members of the church and senior center saw and interacted with Community Volunteers on a regular basis and knew them quite well.
- **Calendars of events** that allowed all members to be informed about community events in a regular and expected way. Both the church and the senior center had such calendars.
- **Communication structure** already in place. The senior center and church had newsletters and used phone trees to let residents/members know about events and other important information. Even though one of the geographical neighborhoods hand delivered newsletters with calendars to each household every month, participation in the neighborhood association was still not high. In addition to good written communication, successful established network neighborhoods had regular, face-to-face contact.
- **Built-in sense of trust, cohesion, and purpose.** Community members with a common purpose had ample opportunity to interact over time, building trust and cohesion. In the BFA project, this was the most important factor for success.

## Geographic and Network Neighborhoods: Implication for Efforts

*Geographic* neighborhoods may have central hubs (one of the participating geographical neighborhoods had a community center and also held neighborhood association meetings at the elementary school), but such sites sometimes attract a small core group of highly engaged neighbors rather than the entire community. *Network* neighborhoods had physical locations that were central hubs (senior center and church), and their purpose provided frequent contacts between their members and between members and Community Volunteers.



Members of a network neighborhood, as in a church or senior center, know something about each other before even being introduced. They may

understand that those around them share a common belief or that those around them are over 60 years old and are there for socialization. Simply living in the same geographical area does not necessarily afford this sense of common purpose and cohesion. If a geographic neighborhood is tightly knit and has a sense of trust or pride, planned events or situations have probably played a part. In a small neighborhood, it might simply be a concerted effort to gather regularly or to make new residents feel welcome (this usually accomplished by a few individual leaders). In a larger neighborhood it might be a crisis (a rash of crime, the need for community-wide structural repairs, a historical designation) that brings people together.

If your geographic neighborhood is lacking a sense of unity or shared purpose, capitalize on an event or create one. In a local neighborhood, sewer pipes (on owners' properties) running from homes to the street were in need of large-scale repair. A few community leaders brought neighbors together to talk about options, including hiring a contractor to give a reduced rate for multiple jobs in the area. This jumping off point resulted in a neighborhood that was more organized and cohesive on subsequent issues.

It is crucial that communities have strong interest and ownership of a model of neighborhood help for seniors. Neighborhoods that merely *agreed to try* the model resulted in a lower level of Community Volunteer engagement than those neighborhoods that *fully embraced* the model.

An important consideration for using the Community Volunteer model in existing network neighborhoods is that many network members (or potential members) in great need of support may not be in the network actively. Their complex needs may keep them from participating. Reaching those at-risk residents who are outside the network requires thoughtful planning and careful outreach.

### **Selection of Community Volunteer Leaders**

You believe your neighborhood or cohesive group or network could benefit from this Community Volunteer approach. You can envision one or more volunteers serving as trusted and familiar “go to” people when seniors or their families want information or help. You have given thought to the type of neighborhood in which you live and gathered information about its strengths and the concerns of residents regarding aging in place. Now, how do you find the right persons to serve as Community Volunteers? In the BFA project, neighborhoods were charged with choosing their own volunteers. In some cases, people already occupying helping roles came forward on their own. In other neighborhoods, community leaders approached caring neighbors with little or no formal experience in helping others and ask them to “try it out.” Ideally, people drawn to the role will be able to carry it out with kindness, empathy, and competence.

While coming from varied backgrounds and experiences, successful Community Volunteers possessed similar qualities. The project revealed that these qualities were important in considering a volunteer's ability to both perform the specified duties and to find personal satisfaction in the work. Both aspects were necessary for success of the model.

Successful Community Volunteers possess:

- Clear understanding of the dynamics of the community and its members – all but 2 Community Volunteers had lived in their neighborhoods for 10 or more years
- Strong interpersonal skills
- Interest in civic engagement
- Interest in increasing their own *personal* connections in the community – this increased their sense of well-being
- Compassion and commitment to supporting those in need
- Ability to establish trust with members of community
- Belief that people will ask for help if they feel comfortable -- not if they feel pressured
- Understanding of the importance to support caregivers without displacing the caregiver role

## **Support & Training**

### Support Structure

It is important that Community Volunteers have a clear understanding of what the position entails. Clear, well-developed job descriptions will serve as a valuable tool, and, as the model evolves, the description can be discussed at quarterly meetings and updated. Volunteer job descriptions and responsibilities are thoroughly discussed in orientation and training. The BFA Community Volunteer Job Description follows.

## BFA Community Volunteer Job Description

<b>Job Title</b>	<b>Community Volunteer</b>
<b>Purpose</b>	<ul style="list-style-type: none"> <li>• To assist in linking seniors in your neighborhood with the services and resources needed to age in place</li> </ul>
<b>Duties &amp; Responsibilities</b>	<ul style="list-style-type: none"> <li>• Attend orientation meeting</li> <li>• Attend quarterly update meetings</li> <li>• Provide ideas for how to best reach neighborhood residents</li> <li>• Be prepared to contact neighborhood seniors via phone, face-to-face contact, and/or email</li> <li>• Commit to maintaining confidentiality of neighbors' information and issues</li> <li>• Participate in supervision</li> <li>• Document contacts made within the neighborhood as they relate to this project</li> </ul>
<b>Time Requirements</b>	<ul style="list-style-type: none"> <li>• Approximately 2-4 hours per week</li> <li>• Available for one year</li> </ul>
<b>Orientation &amp; Training</b>	<ul style="list-style-type: none"> <li>• Two 2-hour orientation sessions will provide volunteers with basic knowledge and materials needed to inform seniors about services as well as an overview of issues related to aging</li> <li>• Staff will hold quarterly update meetings at which additional information (in response to volunteer request) and support will be provided</li> </ul>
<b>Ongoing Support</b>	<ul style="list-style-type: none"> <li>• Staff will be available to provide information and support to volunteers</li> <li>• Community Volunteers will receive monthly stipends to offset costs of providing service</li> <li>• Community Volunteers Project Coordinator: Name: _____ Phone number: _____ Email address: _____</li> </ul>

### Supervision

For the success of your neighborhood model, Community Volunteers must receive regular supervision. In the Blueprint for Aging project, staff initiated and implemented ongoing training. In addition, staff facilitated quarterly meetings so that volunteers from the four neighborhoods could compare notes, brainstorm and support each other. Specific topics were shaped by input from the volunteers who were encouraged to contact staff for additional information or for answers to questions arising from their neighborhood work. For example, one Community Volunteer called to ask if we knew of companies giving senior discounts for Internet access.

To find sources for supervision of your neighborhood's Community Volunteers, BFA suggests contacting an agency that serves local seniors who may identify a staff person able to provide ongoing supervision. The Area Agency on Aging serving your county can supply you with a list of appropriate agencies to contact and possibly assist in determining the best choices. Agency supervision may facilitate finding, or starting, a supervision group with volunteers doing similar work in other neighborhoods.

### Team Approach

Volunteers in the BFA project worked in groups of two or three with the exception of one volunteer who worked alone. The team approach brought consistent input from all volunteers as it allowed volunteers to:

- Exchange information about what works and what doesn't
- Generate new ideas
- Vent and support each other emotionally as needed
- Split up the work by capability, interest, and time available

The volunteer who worked alone wrote in her diary:

"I think the communities that had two or more volunteers really had the right formula. It's just difficult to maintain one's energy and enthusiasm without people right there to call on. You guys (BFA staff) were great, but that part wasn't your responsibility. It would have been good to have a tight 'bud' in it with me!"

In the BFA project, Community Volunteers received a monthly stipend of \$100 to cover costs of traveling, producing materials, and other expenses related to their role. It was apparent that no Community Volunteer served solely because of this nominal assistance; in fact one volunteer refused the stipend and requested its donation to a local charity. However, the stipend was necessary for a few Community Volunteers, and all appreciated the gesture. While allocating such expenditure may not be necessary or possible for every group, the BFA project found that stipends did make volunteering easier financially and added a feeling of importance and accountability to the position.

### Volunteer Orientation

In the BFA project, eight Community Volunteers participated in a group orientation to the pilot in two-hour sessions held on two consecutive days.

Evaluations showed that it was a positive experience. Volunteers shared a sense of excitement and interest, combined with questions about what was expected and how to succeed. Because the group was fairly large, it was possible to bring in guest speakers on various topics or themes. The first training session focused on working with and being helpful to seniors.



Orientation presenters covered topics including understanding aging-related physiological changes, communication, confidentiality, and maintaining healthy boundaries. The second day of training focused on specific county resources for seniors. Whenever possible, presenters engaged volunteers, using interactive approaches such as hypothetical scenarios and role-play. The BFA Community Volunteer Orientation agenda follows.

## **BFA Community Volunteer Orientation & Training**

### **Day One – Gerontology 101**

#### **Welcome (10 minutes)**

*With background on the Blueprint for Aging*

#### **“Elder Circle” (20 minutes)**

*Round robin ice breaker (in order of age) – with each member reflecting on personal experience of helping an older person*

#### **Aging Knowledge Questionnaire (10 minutes)**

*What do volunteers already know about changes in later life and area resources?*

#### **Communication (20 minutes)**

- With neighborhood seniors
  - Confidentiality (form) – Staff will discuss and stress importance of protecting privacy as well as outlining the policies of the pilot (review confidentiality form)
  - Listening Skills – How to best hear and understand what another person is saying verbally and non-verbally
  - Boundaries – What is appropriate for an older adult to ask of a Community Volunteer? What are ways in which the volunteer can help and ways in which he/she cannot?
  - Options vs. Advice – What is the difference?
- With Blueprint staff – Protocol: Whom to call and when to call

\*\*\*\*\* 15 minute BREAK \*\*\*\*\*

#### **Aging “Boot Camp” (15 minutes)**

*Physiological changes that happen with aging*

- Vision
- Hearing
- Other Physical Changes
- Mental Changes

#### **Problem Recognition (20 minutes)**

*Signals that say, “This person could be in trouble.”*

#### **Wrap Up (10 minutes)**

*With time to complete forms*



## BFA Community Volunteer Orientation & Training

### Day Two – Community Resources

#### Welcome

*Impressions of Day One (10 minutes)*

#### Resource Overview (40 minutes)

*Introduction to community resources using scenarios*

- Where to Turn Guide
- Senior Resource Directory

\*\*\*\*\* 10 minute BREAK \*\*\*\*\*

#### Situational Skits (45 minutes)

*Local geriatric social work students play roles of older adults – a chance for volunteers to use what was learned in an interactive, fun way*

#### Outreach and Wrap up (15 minutes)

### Orientation Materials and Handouts

#### Forms

- Job Description
- Confidentiality Agreement
- Incident Report
- Emergency Procedures

#### Tool Kit (Binders)

- Where to Turn Guide
- Catholic Social Services Senior Resource Directory
- Materials from Training
- List of all Community Volunteers with contact information
- Blueprint for Aging staff contact information

*Community Volunteers in the BFA project also participated in quarterly update meetings. A list of topics covered in the Orientation and Quarterly Update Meetings is included in the **Orientation & Training Information** section. The content of the group orientation, covered by speakers and in handouts, creates a valuable training tool for any program serving seniors.*

### A Special Note about Confidentiality

In order to help Community Volunteers distinguish between friendly listening and volunteer assistance, much time was spent in training, supervision and quarterly meetings on the concept and best practice methods of maintaining confidentiality. Neighborhood residents asking for help need to be assured that information shared with a Community Volunteer will not be divulged to others. BFA staff cannot overly stress that the success of neighborhood village models relies on trust. Organizers should not assume that potential volunteers understand the meaning of confidentiality in this context. For example, Community Volunteers should be reminded that records containing identifying information should be kept in a locked location. Role-playing and reviewing scenarios addressing confidentiality are both good ways to help volunteers think about issues of confidentiality in performing their duties. It is a good idea to strengthen the importance and commitment to confidentiality formally upon completion of orientation. The BFA Community Volunteers Confidentiality Agreement follows.

## **BFA Community Volunteers Confidentiality Agreement**

***Participants in the Community Volunteers project are never to be identified by name or otherwise to anyone other than the other Community Volunteer or Blueprint staff.***

To be a Community Volunteer you will necessarily be exposed to confidential information about Neighbors.

Protecting their confidentiality is of the utmost importance and crucial to the success of the Community Volunteers project.

The only appropriate place to share specific situations about a Neighbor is with members of the Blueprint staff or the other Community Volunteer.

All records of neighborhood contacts must be kept in a locked drawer or cabinet.

---

***Please initial the following statements***

\_\_\_ I will not discuss information shared with me in my role as Community Volunteer with my family, friends, or other neighborhood residents. If asked, I will simply state that I have no information.

\_\_\_ I understand that if I willingly or knowingly violate someone's confidentiality, I will no longer be able to participate in the project.

\_\_\_\_\_  
Community Volunteer

\_\_\_\_\_  
Date

\_\_\_\_\_  
BFA Pilot Project Coordinator

\_\_\_\_\_  
Date

### III. Outreach & Marketing

#### Community Volunteer Identification

A Community Volunteer's first step toward becoming a helpful resource to seniors in his or her neighborhood is to become *known*. This is done in a variety of ways and may build on an existing connection. One Community Volunteer said:

“So I try to be a neighbor rather than somebody of authority that’s looking down on you when you need help or anything because I never know when I am gonna need **their** help. I try to convey this to them.”

To begin, Community Volunteers must have a very clear sense of the purpose and goals of the role and have the ability to explain these to community members in a simple, understandable way. Volunteers themselves can develop talking points using comfortable, familiar language.

#### Marketing the Community Volunteer Program

Volunteers received picture ID badges, giving them additional legitimacy and a stronger sense of purpose. In addition to speaking publicly about their work, Community Volunteers did outreach and created materials in an effort to publicize their role as a resource for seniors in the neighborhood. One volunteer made her own business cards and bookmarks to distribute.

All volunteers posted flyers in their neighborhoods. Most felt that the best use of flyers was strategic placement in the community, not mass distribution. Many felt it more effective to address neighborhood association meetings, senior center groups, and resident game nights. Another successful approach was getting ads or articles published in newsletters or other materials distributed to entire neighborhoods.

Getting the word out and being available are both necessary components of project goals, yet they were not always enough to encourage connections with residents who needed help. Organizing an informal gathering to address a neighborhood issue (unsafe city sidewalks) or a topic of interest (low vision devices) or even a service (tax assistance) is a good way to attract people who might otherwise remain on the periphery. Look for resources already in your neighborhood or that will come to your neighborhood for strongest impact.

Initiating groups or clubs is another way to involve more people in their communities. One BFA project neighborhood created a walking group for senior women. By meeting several days a week these women stayed in touch with their neighbors, kept fit, and got out and about in their neighborhood.

Neighborhood projects are also an effective way to strengthen networks and create the sort of environment in which people are more likely to ask for or accept assistance and information. A volunteer in one neighborhood spearheaded a community garden that brought people together for a common goal with far-reaching results. Participation from all age groups was encouraged. Residents in a neighborhood without a grocery store now had easy access to fresh vegetables. One



Community Volunteer remarked this was the first time a child of hers had eaten something she herself picked. To encourage seniors' participation in community gardens, special raised beds can be built to accommodate wheel chairs. Specially designed gardening tools are available for people with specific physical challenges.

When doing outreach and attempting to build connections between neighbors, it is important to take an approach that is specific to your neighborhood. Your approach will depend on factors such as where and how often people congregate, topics that interest residents, and priorities of the neighborhood as a whole (i.e. improvement projects). Reaching people and arranging opportunities for interaction requires knowledge of the neighborhood, creativity, and perseverance on the part of the Community Volunteer.

## IV. Record-Keeping and Evaluation

### Data Collection

Organizing a neighborhood requires accountability and demonstration of effective interventions, whether submitting formal reports to a funding body or presenting records of contacts at a neighborhood association meeting. Although the BFA project required a minimal amount of Community Volunteer reporting, actual collection contact information proved more difficult than expected.

While the BFA project trained Community Volunteers in the importance of recording outreach efforts and contacts made in the community, it was our experience that much important information was not recorded. Most volunteers did not enjoy filling out forms, and in several cases, volunteers did not follow through on this part of the role. Simplifying data gathering partway through the project and supplying attractive journals for narrative entries renewed enthusiasm for recording contacts. Community Volunteers were asked to record their thoughts and feelings about the work and their volunteer position. The first journal entry for one volunteer began, "I think the journal as a replacement for forms (and all of their limitations) is a great idea."

In addition, some volunteers opted to write down more specific information about contacts in their diaries instead of the following simplified form.

Because being helpful was second nature, many volunteers did not recognize and record their efforts to help community members. It was common for a Community Volunteer to recount a small story and for staff to ask whether the volunteer recorded the incident. Often the answer was no and some version of, “I didn’t think I needed to write down that sort of thing.” Volunteers need to be consistently reminded that the work they do is more than conversation. It is valued for the purpose of securing accurate service-delivery information. Conveyed importance of the volunteers’ work adds to a greater sense of satisfaction and accomplishment for them.

A portfolio of volunteer publicity materials containing flyers, cards, notices, and newspaper clippings serves as a record of outreach, providing examples for other groups or even future volunteers in the same neighborhood. It will also serve as a reminder of neighborhood action and accomplishments. BFA staff circulated a portfolio of Community Volunteer publicity material at quarterly volunteer meetings as a way to spark ideas among the groups as well as to acknowledge best practices and creative ideas.

### Evaluation

The BFA Community Volunteers Pilot Project was conducted for 12 months. Data collected during the project provided information that included neighborhood response to this model, the effect of volunteer outreach efforts and working styles, and the impressions of Community Volunteers themselves.

Quantitative data were collected from program forms and included numbers and types of calls and encounters. Qualitative data were collected from the Community Volunteer journals, quarterly meetings, and transcribed one-on-one post program interviews with each volunteer. Variables such as neighborhood characteristics, methods of outreach, and model structure offered an understanding of successful approaches to neighborhood assessment and program development.

## BFA Community Volunteer Contact Record Sheet

Date: \_\_\_\_\_

**Person Requesting Information/Referral** (or community member with whom you spoke):

Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Telephone: ( \_\_\_\_\_ ) \_\_\_\_\_

E-mail: \_\_\_\_\_

**Purpose of the call:**

**What did you do?** This includes outreach efforts, informal conversations, etc.

**If a referral was made, to what agency was it made?**

**Is follow up needed?** \_\_\_\_\_ Yes \_\_\_\_\_ No

**If yes, what is the next step?**

**Name of Community Volunteer:** \_\_\_\_\_

## V. Checklist for Success

Through both its successes and challenges, the Blueprint for Aging Community Volunteers Pilot Project generated suggestions for others organizing volunteers in neighborhoods to support seniors aging in place. Below are five overarching themes to keep in mind.

√ **A desire to organize should come from the community, a grass roots, “bottom up” effort**

Ensure the *neighborhood* identifies the need and that the response is endorsed by the entire community.

√ **Find the right people for the helping role**

Understand characteristics that determine which individuals are more likely to do the job well and find the work satisfying.

√ **Capitalize on strengths that already exist in the neighborhood, such as networks, skills, and services**

Use low cost or volunteer-based local resources to strengthen your neighborhood.

√ **Increase your knowledge base on methods of working with seniors and locating available supports**

Continue to learn good communication skills and appropriate ways to serve seniors. Keep current with available resources.

√ **Create a structure of support for Community Volunteers**

Supervise and provide ongoing training so volunteers continue to practice problem solving, update resources, and gain emotional support.



## **VI. Orientation and Training Information**

Materials used for orientation and ongoing training of volunteers fell into several categories important for those working with older adults.

### **Aging and aging-related changes**

- What is Gerontology?
- Aging Statistics (national and state trends as well as community trends)
- Physical and Sensory Changes in Aging
- Interacting with Visually Impaired Seniors
- Activities of Daily Living – What are They?

### **Communication**

- 10 Commandments for Good Listening
- Communication Techniques for Those with Dementia
- Active Listening
- Nine Tips for Talking to Those Who Are Hard of Hearing
- Ten Tips for Hard Of Hearing People
- Nonverbal Communication

### **The Volunteer Role**

- Maintaining Healthy Volunteer Boundaries
- Practicing Boundary Dilemmas and Solutions

### **Recognizing problems**

- Recognition (overview of “red flags”)
- Depression in Seniors
- Elder Abuse
- Symptoms of Alzheimer’s Disease
- Alzheimer’s Risks & Causes
- Securing and Using Assistive Devices

## VII. Project Forms

Forms used in the Community Volunteers project can be found throughout this guide. Several were designed to collect data from neighborhoods and volunteers, while others provide information for program organizers. Because budgets are low and volunteer manpower is used, it is important that your project documents and forms be as simple, clear, and brief as possible. Blueprint for Aging Community Volunteer Program forms are listed in the Table of Contents. Forms included in this guide may be adapted to reflect unique neighborhoods and programs.

## VIII. List of Washtenaw County Resources

A core part of Community Volunteer orientation was identification of local services for seniors. Publications specific to Washtenaw County, the *Where to Turn Guide* and the *Senior Resource Directory*, were primary sources to locate services. Volunteers received copies of these publications at orientation and referred to them throughout the pilot. Similar resources may exist in your community. In the past year, Washtenaw County instituted the 2-1-1 System for community members' easy access to community resources with one phone call. Area Agencies on Aging are also a valuable resource. Each state is divided into AAA regions receiving federal Older Americans Act funds to support local programming.

### Where to Turn Guide

University of Michigan's Turner Geriatrics Center produces *Where to Turn: Guide to Washtenaw County Programs & Services for People Over 60*. To view a PDF version of the document, go to:

<http://www.med.umich.edu/geriatrics/communityprograms/WhereToTurn2005.pdf>

*For tips on searching the document, go to:*

<http://www.med.umich.edu/geriatrics/communityprograms/SearchTips.htm>

Turner Senior Resource Center  
2401 Plymouth Road  
Ann Arbor, MI  
734-998-9353  
[www.med.umich.edu/geriatrics/tsrc](http://www.med.umich.edu/geriatrics/tsrc)

## **Senior Resource Directory**

Catholic Social Services of Washtenaw's Older Adult Services Unit produces the *Senior Resource Directory for Washtenaw County* annually. It provides a detailed listing of medical services, housing information, legal referrals, care management assistance and more. To view this two-page resource go to:

Directory, Page One

<http://csswashtenaw.org/uploads/pdf%20files/resource.pdf>

Directory, Page Two

<http://csswashtenaw.org/uploads/pdf%20files/resource-page2.pdf>

Catholic Social Services of Washtenaw County

4925 Packard Road

Ann Arbor, MI 48108

734-971-9781

[www.csswashtenaw.org](http://www.csswashtenaw.org)

## **2-1-1**

Residents of Washtenaw County can receive immediate information about human service programs through Washtenaw 2-1-1, a referral line connecting callers to essential resources and volunteer opportunities 24-hours a day, seven days a week. Funding has been provided by Washtenaw United Way, Washtenaw County, the Ann Arbor Area Community Foundation, Pfizer Global Research & Development, and the RNR Foundation.

Dial 211 directly or dial 734-477-6211 to reach 2-1-1 referral line

Or search the 2-1-1 database online by going to:

<http://www.rtmdesigns.net/hva/>

## **Area Agency on Aging 1-B (AAA 1-B)**

Area Agency on Aging 1-B is dedicated to preserving the independence, dignity, and quality of life of seniors, family caregivers and persons with disabilities residing in Livingston, Macomb, Monroe, Oakland, St. Clair, and Washtenaw counties. Area Agencies on Aging are local organizations in each state that manage federal Older Americans Act funds. Use your search engine to locate your local AAA by entering: Area Agency on Aging and your county.

To learn more about programs offered through AAA 1-B, go to <http://www.aaa1b.com/index.php>

For information & referral, call 1-800-852-7795.

\*\*\*\*\*

There are many national and regional resources for communities helping older adults age in place. Here are two that were useful in our efforts:

Beacon Hill Village – Boston, MA

<http://www.beaconhillvillage.org/index.html>

This site provides history of the organization and general information about replicating similar models elsewhere. “How To” manuals are available for purchase and give a detailed step-by-step plan.

ShareCare of Leelanau, Inc. - Northport, MI

<http://sharecareleelanau.org/>

This site is geared toward members of the ShareCare volunteer-based organization, its not-for-profit corporation, and potential members. It provides real life stories about the success of neighbors helping neighbors to live independently for long as possible. Many forms used in the ShareCare program can be found on this website.

## **IX. Conclusion**

This guide combines elements of “How To” and “Lessons Learned” from the 2007 Blueprint for Aging Community Volunteers Pilot Project. The BFA goal is to help communities organize volunteer assistance so that seniors can live independently and safely in their neighborhoods.

When organizing your own efforts, two critical elements stand out:

- As you consider using resources and relationships that exist in your community, keep in mind the discussion differentiating Network Neighborhoods and Geographic Neighborhoods.

- When thinking about volunteer recruitment, management and retention, shape your efforts with a focus on what attracts and will motivate potential Community Volunteers. Choose those volunteers who seek out the role rather than those who merely agree to fill the role.

In Summary, the model of neighborhood support used by the Blueprint for Aging relies on local commitment to neighbors helping neighbors. The goal is to help seniors remain in their own homes for a longer period of time by making it easier for them to ask for and receive help. Though there were varying levels of project success among the BFA project neighborhoods, the community-minded spirit demonstrated by residents will hopefully continue to grow in all the Community Volunteer neighborhoods.

The Blueprint for Aging would like to thank the nine wonderful women who embraced their Community Volunteer positions in this project. We express gratitude for their hard work and acknowledge them for the caring people they are. This was a dynamic group of volunteers with a range of backgrounds who came together for a cohesive purpose from the project onset. The Blueprint for Aging Community Volunteers Pilot Project became a productive research project due to their work and remained a pleasure throughout due to their inspired dedication to their neighborhoods.



For additional information, please contact the Blueprint for Aging through our website: [www.Blueprintforaging.org](http://www.Blueprintforaging.org) or by phone: 734.712.2718.