Effective Volunteer Practices

Examples from ACL Programs

ACL
Administration for Community Living

CONTENTS

Purpose

This practice guide was created as part of the Administration for Community Living (ACL) Volunteerism Study project, sponsored by ACL's Office of Performance and Evaluation.[*] Its purpose is to provide examples of effective volunteer practices adopted by Older Americans Act (OAA) program and State Health Insurance Assistance Program (SHIP) grantees. It is intended for use by ACL grantees and providers to enhance the use and retention of volunteers to provide critical OAA services and health insurance counseling and assistance in their communities.

Background

Enacted in 1965, the OAA created the foundation for a comprehensive system of services and supports that enables millions of older adults in this country to continue to live independently as they age (OAA, 42 U.S.C. § 3018). Today, programs funded by the OAA provide essential services to older adults (i.e., generally age 60 and older) – including home-delivered and congregate meals, family caregiver support, in-home assistance, preventive health services, transportation, job training, protection from abuse, and other supportive services – targeting those with the greatest economic or social need, particularly low-income and minority persons, older individuals with limited English proficiency, and older persons living in rural areas. These programs play a vital role in helping to maintain the health and well-being of millions of seniors age 60 and older, reaching one in five older adults.

Created under the Omnibus Budget Reconciliation Act of 1990, SHIPs are designed to empower, educate, and assist Medicare-eligible individuals, their families, and their caregivers through objective outreach, counseling, and training, to make informed health insurance decisions that optimize access to care and benefits. Specifically, SHIPs assist people in obtaining coverage through Original Medicare (Parts A & B), Medicare Advantage (Part C), Medicare Prescription Drug Coverage (Part D), and Medicare Supplement (Medigap). SHIPs also assist beneficiaries with limited income to apply for programs such as Medicaid, Medicare Savings Program and Extra Help/Low Income Subsidy, which help pay for or reduce healthcare costs (ACL, n.d.-b)

Services and supports funded through the OAA and SHIP are delivered in every state and territory

through a comprehensive infrastructure known as the national aging services network. At present, the network consists of 56 state units on aging (SUAs), 244 tribal organizations, two native Hawaiian organizations representing 400 tribes, 629 area agencies on aging (AAAs), and nearly 20,000 local service providers (ACL, n.d.-a). These agencies and their staff play a key role as they plan and provide the actual services to OAA and SHIP service recipients. However, the delivery of the services also largely depends on the efforts of volunteers. Without volunteers, many programs would not be able to provide as many services or reach as many individuals in the community as they currently do because funding for these programs is limited.

With the U.S. aging population expected to increase substantially over the next 40 years (U.S. Census Bureau, 2020), and funding for many of the programs not having kept pace with the increase in the aging population, it is more important than ever to effectively engage existing volunteers and recruit new volunteers to help OAA programs and SHIPs meet the needs of their communities and ensure that services are provided continuously, reliably, and effectively.

Programs that are using volunteers or are planning to use volunteers can draw from a wide range of existing resources that provide guidance for effective volunteer practices. Some of these resources include the following:

- **SHIP Volunteer Risk and Program Management Policies** (ACL, 2016)
- **National Long-Term Care Ombudsman Resource Center Volunteer Management Network** (National Consumer Voice, n.d.)
- **Pennsylvania Department of Aging Volunteer Engagement Toolkit** (Pennsylvania Department of Aging, 2013)
- **Volunteering Reinvented: Human Capital Solutions for the Nonprofit Sector** (Corporation for National and Community Service, 2007)
- **Successful Strategies for Recruiting, Training, and Utilizing Volunteers: A Guide for Faith- and Community-Based Service Providers** (Substance Abuse and Mental Health Services Administration, 2005)

The following section presents specific strategies implemented and recommended by OAA program and SHIP grantees to recruit, train, engage, and retain volunteers for their programs. Stakeholders shared these strategies during interviews conducted as part of the ACL Volunteerism Study. For details about how interview participants were identified and which programs they represented, see Appendix A.

Effective Volunteer Strategies: Examples from ACL Programs[†]

RECRUITMENT

Word of Mouth

Effective strategy: **Use different stakeholders, including service recipients and existing volunteers, to discuss and promote volunteer opportunities, engaging with interested individuals one to one.**

Programs have noted word of mouth as one of the most effective strategies for recruiting volunteers. Individuals who have benefited from the services and those who provide the services can tell personal stories and engage one to one with interested individuals to provide details and answer questions. In addition, they can share their personal experience of how they benefit from volunteering or how they and the program benefit from the volunteers. Programs also highlight that volunteers themselves are a great source for recruiting new volunteers. Specifically, existing volunteers can extend personal invitations ("why don't you ride along with me") and, as noted above, can share their experience and make an impassioned ask.

> ## TIP
>
> **Make sure that current volunteers and other stakeholders have readily available information about how to connect others to volunteer opportunities. For example, this could be through cards or refrigerator magnets handed out at the time of training.**

work with partners or volunteers to distribute these materials, but they have also reported buying mailing lists (of older adults) and using voter lists to send materials directly to specific individuals in the community.

Print Materials

Effective strategy: **Use print materials for general outreach as well as targeted outreach to specific groups.**

One recruitment method noted to be effective by programs, especially with older adults who have retired, is the use of print materials. These may include newspaper ads, fliers, or even postcards. Programs can

Community Events and Using Media Outlets

Effective strategy: **Take advantage of community events and media outlets to reach a wide network of potential volunteers in the community at large.**

Programs report using a number of avenues to recruit volunteers, including program websites, community health fairs, online newsletters, radio ads, and social media platforms (e.g., Facebook). Organizations may have an exhibit table with print materials that is staffed by volunteers and/or paid staff.

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† ACL's Volunteer Risk and Program Management Policies, https:// acl.gov/programs/senior-medicare-patrol/volunteer-risk-and-program-management-vrpm-policies, are required to be implemented by all SHIP and Senior Medicare Patrol grantees.

Existing Volunteers

Effective strategy: **For programs that offer a range of different services, utilize volunteers across services.**

For programs that offer a range of different services (e.g., SHIP, meals on wheels, health promotion class), existing volunteers may be used across the organization. One program lead recommended creating a central pool of all volunteers in the organization and coordinating across service types to provide an opportunity for existing volunteers to contribute to different services.

Service Recipients

Effective strategy: **Engage OAA service recipients and their family members to encourage them to give back by volunteering.**

Programs emphasize that many volunteers who contribute their time to the programs are those who receive services themselves, have received assistance in the past, or are family members of service recipients. This population has experienced the benefits of the programs themselves and may want to give back in turn. Some programs highlight volunteer opportunities to service recipients and family members, especially those who have expressed that they like the program, talking with them personally about their potential interests and existing opportunities that match their interests.

TIP

Develop a short script for program staff to use if recipients or family members indicate an interest in getting more involved with the program.

"People that have time in their hands are looking for meaning and purpose. And I [am] always refreshed by the idea [that] volunteers get so much out of their experience, that they're so grateful to do it. And I'm just often aware that I'm so grateful for them, but they're so grateful to have the opportunity. So, it's such a 360 degrees. It's a wholesome thing for so many people. And I think it makes a difference in their lives as well."

—Senior Center Director

Volunteer Organizations and Other Community Entities

Effective strategy: **Recruit volunteers through national volunteer organizations, and partner with other entities in the community to help recruit volunteers.**

To recruit volunteers, many programs partner with national programs, such as the Retired and Senior Volunteer Program (RSVP); local entities, such as religious entities, educational institutions, and businesses; local civic groups or clubs, such as the Lions Club and Rotary International; and other agencies in their local aging network. In addition to recruiting volunteers for the program overall, these kinds of partnerships have helped programs to recruit volunteers with specific backgrounds and skills.

Specific Populations

Effective strategy: **Target recruitment efforts toward specific populations, such as recent retirees and students or others who may be available to volunteer (e.g., individuals who have become unemployed or are working part-time).**

Some programs have found it effective to focus their recruitment strategies on specific populations. These

> ### TIP
>
> **Develop relationships with faculty and staff of relevant programs (e.g., social work, education, public policy) and departments of local colleges and universities to develop internship or other similar programs.**

may be older adults who have just retired (e.g., attorneys for legal assistance, teachers, public utility workers) or students who need to do field placements as part of their educational requirements (e.g., law students who volunteer for legal assistance programs). In addition, programs have noted adjusting their recruitment based on changes or needs in the community. For example, during the COVID-19 pandemic, programs have targeted those who could not go to school and those who lost or left their jobs.

SCREENING AND INTAKE

Application Process

Effective strategy: **Use a formal application process to identify potential volunteers and their interests and preferences.**

Similar to paid positions, volunteers apply to programs using an application process. Programs use volunteer application processes that vary in complexity, however. Most use a formal online application, followed by an interview by a paid staff member (either in person or via phone), about the program and activities, screening requirements, volunteer preferences and availability, volunteer roles and responsibilities, training requirements, and the required level of commitment.

Job Descriptions

Effective strategy: **Develop job descriptions at the program level for volunteers to specify roles and responsibilities.**

Job descriptions can help clarify roles and responsibilities regardless of whether they are intended for volunteer or paid staff. Most programs have devel-

oped job descriptions for specific volunteer roles within their organizations and noted the importance of organizations developing their own job descriptions (rather than using job descriptions from an entity they contract with, e.g., AAA), as they are the ones working directly with the volunteers. One organization posted their job descriptions for prospective volunteers online to access as part of the application process. Some volunteers assume several roles within one organization and therefore may receive several different job descriptions.

Matching Volunteers to Positions

Effective strategy: **As part of the interview, determine if the volunteer is a good match for the program, identify volunteers' preferences regarding their interests and availability, and determine specialized skills and how to use them for the program.**

Since volunteers for OAA programs and SHIPs closely interact with others who are seeking support, it is important to ensure the volunteers are a good match for the program. One program noted observing individuals' personalities and interpersonal skills during the interview to help determine whether they are nonjudgmental, unbiased, reliable, and motivated to give back. Some programs noted using screening tools to identify potential biases. Programs also discussed the need for their volunteers to respect the diversity of the people and communities that they will be serving.

Often volunteers are unable to commit 40 hours per week to this work. Their availability may be limited due to other commitments (e.g., employment, caretaking). All programs noted discussing preferences and availability for volunteering early on, to ensure volunteers can be matched and assigned appropriately. In addition, volunteers come from many backgrounds (e.g., information technology [IT], nursing, marketing, healthcare management) and bring

"I think to me, the most important requirement is that they have the desire to give back because if they don't have that, everything, all of that—[they] can have a background in health, education, and other things—if they do not have that desire to give back, to me, that's the most important thing."

—Home-Delivered Meals
Program Staff

varied personal and professional skills. Programs and volunteers noted the importance of discussing backgrounds and skills in detail and finding opportunities to use them most effectively. This may include using skills that go beyond the defined volunteer role (e.g., IT skills). Programs also noted the benefit of identifying multiple opportunities within a program for volunteers who are interested.

Background Screening

Effective strategy: **Conduct background checks and check references of prospective and current volunteers to minimize risks to service recipients and ensure prospective volunteers meet specific program requirements.**

Since most volunteers who contribute to OAA programs or SHIPs directly interact with clients who need services and supports to live independently, it is important that all volunteers are vetted appropriately and do not pose any risks to clients. Most programs conduct state and sometimes federal background checks (name-based and/or fingerprints) as part of their initial screening process and again every few years. Given that there is a cost for conducting each background check, one program noted conducting the background check after the interview to ensure the individual is a good fit for the program and has confirmed their willingness to volunteer. The type of background checks required and how frequently they have to be repeated are determined by state and/or local programs. Background checks may include information about a person's criminal history, sex offender status, driving record, and past employment history. In addition to background checks, most programs also check references for volunteers.

Programs also have specific screening requirements based on their program needs. For example, for nutrition programs, volunteers have to have an active driver's license, own a car, and have car insurance. For the Long-Term Care Ombudsman Project (LTCOP), prospective volunteers who have worked at a long-term care facility in the past are required to have a 1-year gap between their employment and returning as a volunteer in the facility. In addition, LTCOP staff may interview family members or staff at that facility to ensure there is no potential conflict. For SHIPs, programs verify that volunteers do not have an active insurance agent license or perceived connection to an insurance company or agent as part of the initial screening and also repeatedly (e.g., monthly) while they are volunteering.

Onboarding

Effective strategy: **Determine what type of agreements volunteers need to sign and adhere to, and provide program details and materials during the onboarding process.**

Depending on the organization and program, onboarding can vary in complexity. Most programs require volunteers to sign a range of documents, including an agreement for their commitment (e.g., 2 years), a code of conduct or code of ethics, a client confidentiality agreement, a nondisclosure agreement, or an agreement that they will adhere to training scripts and fidelity requirements. In addition, volunteers usually receive an orientation to the organization and program and may receive a (volunteer) manual or handbook and an ID, depending on the program. One program noted having an online orientation video; another noted providing jackets and signs for volunteers' cars to ensure they are recognized as representing the organization. Once initial onboarding is completed, volunteers receive training and mentoring. For large entities with multiple programs, volunteers complete a central intake or onboarding and then are assigned to specific program staff managers to initiate the training and provide supervision.

TRAINING, MENTORING, AND SUPERVISION

Initial Training and Certification

Effective strategy: **Provide initial training that aligns with general requirements and that is customized to programmatic needs and content. Take advantage of in-person trainings to observe volunteers and further determine their fit with the program, and to build cohesion among volunteers.**

Different programs have different training requirements (i.e., duration and content) and use a mix of online and in-person training. Most programs provide an initial general training module, followed by more specialized in-depth content. The general training may be required by the state (i.e., LTCOP) and may be provided online for volunteers to complete on their own time. Subsequent training tends to be provided in person (or virtually during the COVID-19 pandemic) in small class formats and may be hands-on with other volunteers. Programs noted that small group trainings (5–10 people) may be more effective than individualized trainings because a group format provides an opportunity for interaction and discussion. In addition, it provides an opportunity to observe volunteers: how they train, how they participate, and how they interact. Sometimes the training and observation can be used to determine when a volunteer may not be a good match for the program. One LTCOP also used case studies as part of their group training, which provided an opportunity for volunteers to bond and get to know each other.

Some programs have adopted a train-the-trainer model, with experienced volunteers providing the training. The number of training hours volunteers have to complete also varies. Some programs, like the LTCOP, require a minimum of 36 training hours; others, like home-delivered meals, may require very little training and focus more on the actual process of delivering services.

"The impression is that volunteers are free, they don't cost anything, just use volunteers to do whatever. But there's so much time and effort and work that has to go into [it], to get somebody ready to even help that you have to budget for that. You have to spend money on it or it's not going to work."

—ACLProgram Staff

Programs use existing training content (e.g., from ACL) but also use their own materials. Organizations that offer multiple programs may also cross-train volunteers, so they can contribute to any of the programs, but allow them to "specialize" in one role, depending on their comfort and interests.

Some volunteer programs, such as the LTCOP, SHIP, and evidence-based programs, require volunteers to complete an exam to get certified. Programs differ on how stringent the certification process is. For one of the LTCOPs, volunteers have to complete a final test and go out with the director to conduct a facility visit for the director to observe. As noted by the SHIP program staff, exams are "open book "because volunteers are not expected to know everything but need to know how and where to find the information.

Ongoing Training

Effective strategy: **Use ongoing training as a tool to deliver new and updated information and enhance program knowledge. Also provide presentations on relevant topics throughout the year, using guest speakers.**

TIP

Take advantage of in-person trainings to observe volunteers and further determine their fit with the program, and to build mutual support, commitment, and supportive relationships among volunteers.

For some programs, like the LTCOP and SHIP, program requirements and rules change often, requiring volunteers to stay up to date on new information. These programs provide regular ongoing training and require recertification to ensure volunteers are well informed. Most programs provide ongoing training and information dissemination to their volunteers through multiple modalities. Programs may provide access to monthly webinars, provide annual training that is focused on a specific topic delivered by an expert speaker, and/or provide additional training and presentations during recognition events. Programs may also update their volunteers concerning regulatory changes and other program changes through email and standing meetings. Some programs conduct monthly or quarterly meetings consisting of skill-building activities, speakers, question and answer sessions, updates, and case discussions.

Mentoring

Effective strategy: **Provide mentoring or shadowing opportunities for volunteers, and allow them to continue to shadow staff until they feel confident in their roles.**

Training is effective for disseminating knowledge, whereas mentoring can help teach skills and enhance volunteers' confidence in their roles. Program staff and volunteers consider mentoring to be the most valuable teaching method. Thus, most programs require some mentoring or observation before volunteers can "go out on their own." Mentoring may be provided by paid staff, such as program coordinators or volunteer coordinators, or by experienced volunteers.

Some programs (i.e., LTCOP, SHIP) provide structured mentorship to volunteers and require a minimum number of mentoring hours, with the option of volunteers continuing with a mentor until they feel confident and comfortable in their roles. In addition, one

LTCOP noted requiring new volunteers to go out once with each ombudsman to learn about different styles and practices. Other programs provide less structured mentorship, with new volunteers shadowing program staff or experienced volunteers for varying lengths of time. Most programs maintain open lines of communication between volunteers and mentors for questions and support.

Supervision and Feedback

Effective strategy: **Provide support and feedback to all volunteers.**

Just like paid staff, volunteers need supervision and feedback. Programs described supervision as a key, though labor intensive, component of operating a volunteer program. Coordinators or supervisors manage schedules and assignments, may monitor the timely submission of paperwork, ensure volunteers have logged their hours, and are available for questions. The staff may also provide feedback to volunteers and discuss improvements, either as part of an annual evaluation or during regular check-ins. Volunteers who are having difficulty may be provided additional support, mentoring, or training. Depending on the size of the organization, coordinators or supervisors may be responsible for all volunteers or a selected number of volunteers (e.g., volunteers serving a specific county only).

Asking for Feedback

Just as volunteers need to know how they are performing; programs need to obtain feedback about how they are doing. Some programs provide an opportunity for volunteers to provide feedback. For example, volunteers may complete an annual survey asking about how satisfied they are, what they like/ don't like, and whether they are receiving sufficient support and resources.

TIP

Conducting performance assessments of volunteers similar to those conducted with paid staff can help make volunteers feel more like a part of the program and help ensure program quality.

SUPPORT

Leadership Engagement

Effective strategy: **Ensure that program leadership is engaged with volunteers and champions the important role volunteers play.**

Good program leadership can play a significant role in making volunteers feel supported and engaged. Through their actions and communication, leadership can help underscore the important role volunteers play, ensure that volunteers feel part of the program, and build cohesion between staff and volunteers. One member of program staff noted that their director is very connected, going to all volunteer events every year (in 1 year, taking 11 trips in 10 business days), attending all quarterly meetings (and all virtual meetings during the pandemic), and letting volunteers know what is happening at the state level and asking them for feedback and ideas.

"Especially our SHIP liaison is so appreciative of us. And if anyone's ill, she sends cards, she's always there. You know, I feel so supported. She lives a long way from where I live. But I was in the hospital in 2019 and she came to visit me in the hospital. And it was a long wait, on a Saturday. So, you know, it wasn't a workday for her. So, I think that she does show her care. The whole agency cares for us. And they know that without the volunteers, they can't do it all."

—SHIP Volunteer

Program Culture

Effective strategy: **Build a supportive culture in which volunteers feel valued and connected.**

Like most paid staff, volunteers want to feel that they are part of a team and that they are contributing to the success of the program. Many programs do not distinguish between paid staff and volunteers, using similar procedures and giving them similar responsibilities. Some programs call both paid staff and volunteers "team members" to foster a work culture in which they do not feel different. In addition, a volunteer noted that programs need to pay attention to how any changes they implement to their operations (e.g., new email system) may also impact volunteers and the work they do.

Dedicated Support Staff

E*ffective strategy:* **Hire a volunteer coordinator or have staff who can dedicate part of their time to working with and supporting the volunteers.**

One of the most promising strategies for effectively using volunteers is having staff support them and help mitigate additional burden on volunteers. Some programs have invested funds to hire staff dedicated specifically to working with volunteers (i.e., a volunteer coordinator or liaison). Others have set aside staff time to ensure volunteers receive the support they need and coordinate as much of their work as possible (e.g., scheduling and arranging the classes they will teach or co-teach). One program noted using an AmeriCorps fellow whom they do not need to pay but who serves as a volunteer coordinator for their organization, managing all aspects of their volunteer activities across their OAA programs, including recruitment, interviewing, matching, tracking, and support. Regardless of what staff are used, they can help ensure that volunteers feel genuinely cared about and recognize their contributions, keep everything organized, and make themselves available to provide support.

Check-In Meetings and Supporting Materials

Effective strategy: **Create processes for keeping volunteers informed and answering their questions.**

Volunteers must feel informed and supported by the program staff. Some programs hold regular meetings with volunteers individually and/or as a group, to check in with them, answer questions, provide reminders and updates, and obtain feedback. One program noted having an internal secure website to provide its volunteers with helpful resources, including fact sheets and training materials. Some programs also have staff who use an open-door policy to remain available to answer volunteers' questions and hear about their experiences.

Reimbursements

Effective strategy: **Reimburse volunteers for any costs they incur as part of their volunteer work.**

Programs generally ensure that volunteering does not create a financial burden for the volunteers by reimbursing them for any costs they incur and providing supplies they need. Most programs either provide a mileage reimbursement, based on the federal mileage rate for the miles the volunteers have driven, or gas reimbursement. Programs also frequently provide office supplies the volunteers may need, such as envelopes, stamps, and paper and ink cartridges for printing. Programs also usually provide other materials, such as training and program materials for volunteers to use.

Stipends and Other Incentives

Effective strategy: **Consider providing stipends to volunteers as an additional incentive and to show appreciation for their time and efforts.**

Even though it presents an additional cost, offering a monetary incentive may help retain volunteers and

"They cover all of our expenses. For those people who want computers [...] it's all provided. And not all areas do that, but this area elected to put money into our, you know, our needs so everbody can have quality equipment. It's maintained by them. And if I have a problem with my computer, all I have to do is call one of the SHIP people and she will meet me to pick it up. You know, it's a good thing."

—SHIP Volunteer

reduce costs for recruiting and training new volunteers. As noted by programs providing disease prevention and health promotion services, such as training for chronic disease self-management, training volunteers to lead these classes is time-consuming and costly. A small stipend for completing a class series may increase the likelihood of the volunteer staying with the program and serving as trainer. Programs have also reported providing other forms of incentives or tokens. For example, one program has partnered with a local business that pays for volunteers to get car washes or fill up their gas tanks.

RECOGNITION

Annual Recognition Event

Effective strategy: **Recognize volunteer contributions in a public event.**

Volunteers appreciate when their contributions are recognized and valued. Programs usually host an annual event, such as a brunch, lunch, or party, to recognize volunteers, to highlight the work volunteers do and their impact on the community and the program, to share volunteer stories, and to hand out awards and certificates. In addition, the event provides an opportunity for staff and volunteers to socialize and spend time with each other. Programs also use these types of events to provide additional training or have guest speakers. Some programs have noted making this event as high-profile as possible by inviting elected officials and state leaders to speak and attend.

Continuous Recognition

Effective strategy: **Build strategies for continuously recognizing volunteer contributions during day-to-day operations.**

Programs recognize that volunteers need to feel valued more than once a year and use a range of strategies to recognize volunteers and their efforts throughout the year. Some programs use their website and/or newsletter to highlight a specific volunteer's contributions and showcase the impact of volunteers in general. Programs also conduct regular (e.g., monthly) group calls to help make volunteers feel connected, provide feedback and support, and discuss program-specific updates. Writing personal cards, such as thank you cards, birthday cards, or anniversary cards, has also been identified as an effective strategy by programs to show their appreciation and make volunteers feel valued. In addition, programs use simple acts of recognition, such as verbal praise.

TIP

Even if local officials cannot attend the recognition event, they can prepare a declaration that can be read on their behalf or sign certificates of appreciation that can be distributed at the event.

RETENTION

Expectations and Transparency

Effective strategy: **Be clear and transparent with volunteers as early as possible in the application process about what is expected of them.**

At times, an individual may sign up to volunteer but then, after they have completed the training or started volunteering, decide that the program is not for them and stop volunteering. Programs try to be as detailed and clear about the roles and expectations as possible to avoid volunteer attrition after having invested time and money for screening, onboarding, and training. For example, programs tell interested individuals up front about program requirements (e.g., background checks, need to be willing to follow scripts when leading classes) and training requirements (length and content) and check with each volunteer about whether they understand and are prepared to adhere to these requirements.
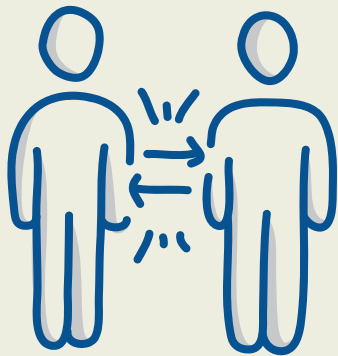
Flexibility and Accommodation

Effective strategy: **Work with volunteers based on their availability and find a way to engage them even when there is not a role immediately available for them.**

One of the advantages of volunteering is that it requires less time commitment than paid positions. If programs can meet volunteers where they are and allow them to volunteer based on their availability, volunteers may be more likely to continue volunteering. In addition, programs may adjust the training schedule to accommodate volunteers' availability (e.g., on weekends). Programs also try to avoid turning volunteers away by finding ways to engage them until the program can assign them a permanent role (e.g., use them as on-call substitute drivers).
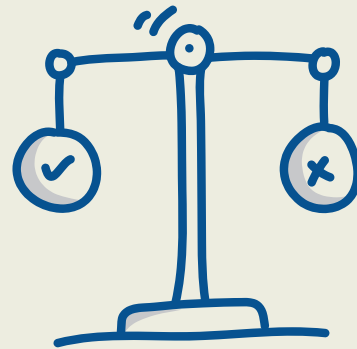
"As we, as a network, look at volunteers, we really have to be careful to try to strike a balance between what the volunteers are willing to do, their availability, and compare and contrast that maybe to the needs of the program. And there are some individuals who are eager to volunteer in some programs, but we can't make it so much of a burden that they were turned off by that. That's a balance that program managers really have to try to work through."

—ACL Regional Administrator

Recognizing and Applying Skills

***Effective strategy:* Identify and use volunteers' skills.**

Volunteers want to know that their skills are recognized and used. Often, volunteers bring skills that can benefit the organization beyond predefined volunteer roles. For example, a volunteer with an IT background may volunteer by conducting outreach and providing education, but they may also be equipped to assist the organization with IT-related needs. Volunteers note that programs should identify their skills beyond the volunteer role as part of the interview and find ways to use these skills as feasible.

Engagement and Relationships

***Effective strategy:* Engage with volunteers consistently and in a meaningful way to build positive relationships.**

Positive volunteer engagement and relationship building are key to retaining volunteers. Program leads and volunteers consistently highlight the importance of engaging with volunteers, regularly checking in with them, making them feel connected and part of something valuable and important, and treating them respectfully. Programs generally consider volunteers part of the team, encouraging them to provide honest feedback and then using their feedback to make changes. Programs also find ways to check in with volunteers and make them feel connected. This includes greeting them and checking in with them when they arrive, introducing volunteers to all staff, and providing opportunities for volunteers to connect with staff and other volunteers.

"It's just one of those things that we found to be, you know, to be successful. The more opportunities we have to keep connected with people, the more apt they are to stay on. And now, thanks to these platforms, like Zoom and Google, and you know, just picking up the phone or sending a card. Believe it or not, that's what people want. They want to feel needed. And so, that's what we do."

—Disease Prevention and Health Promotion Program Training and Fidelity Manager

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Appendix A.
Participant Identification and Representation

As part of the volunteerism study, researchers interviewed 38 stakeholders, representing Administration for Community Living (ACL) program staff, staff from state agencies and grantee organizations, as well as volunteers. Participants were identified in a top-down approach, moving from the general national program level to specific states and grantees, and then to volunteers.
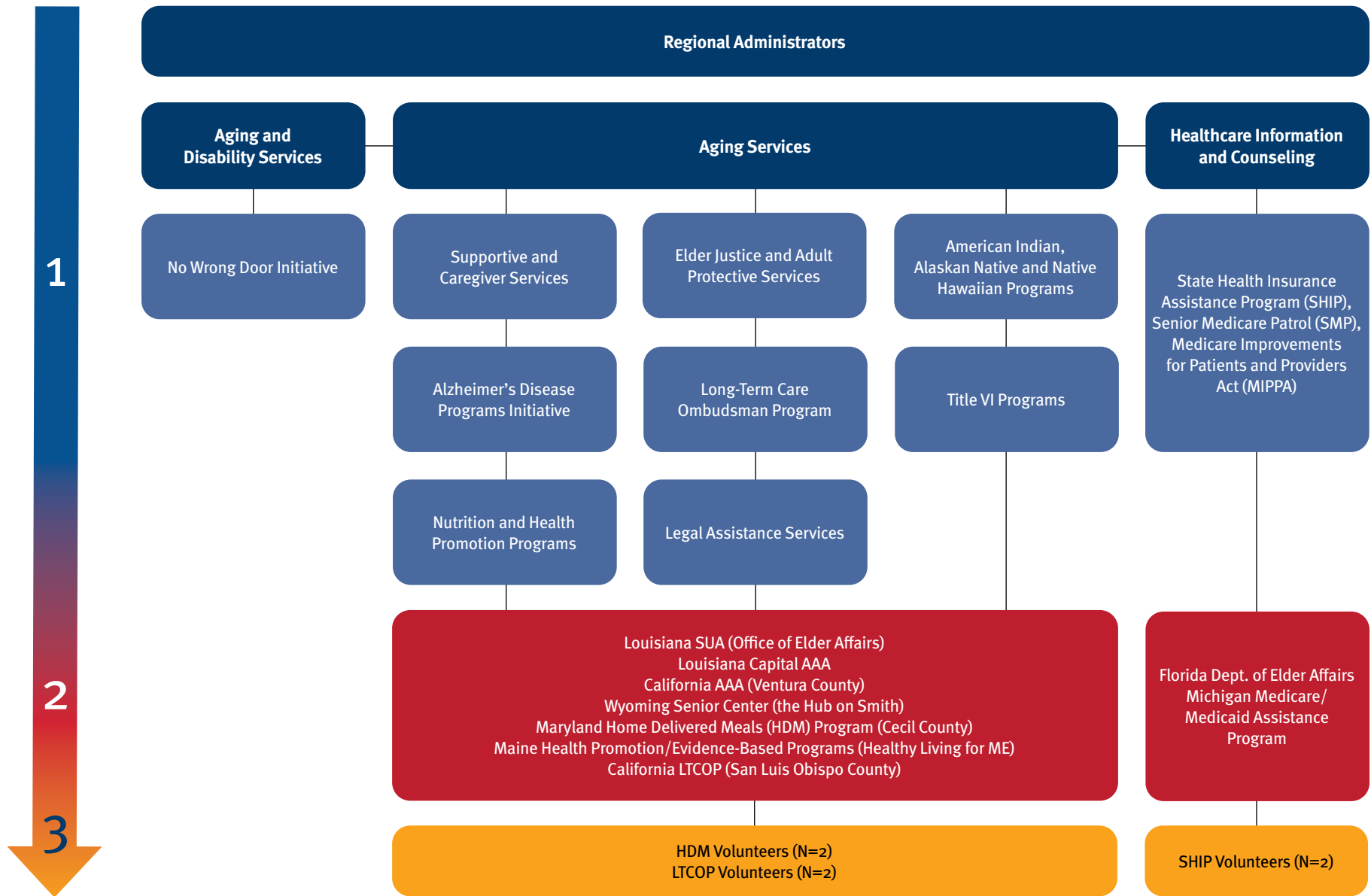
In the first step, the ACL project lead identified ACL programs and their leads for potential inclusion in the study. These included the ACL program director and other program staff, as well as ACL regional administrators. Target staff were invited to participate in a 1-hour interview to discuss the role of volunteers, their economic value, and effective practices for using volunteers. Participants represented 10 different ACL programs focused on aging and disability services and healthcare information and counseling.

In the second step, ACL participants were also asked during the interview to identify grantees at the state level (e.g., state units on aging [SUAs], area agencies on aging [AAAs]) and local level who use volunteers to provide Older Americans Act (OAA) and State Health Insurance Assistance Program (SHIP) services and supports in the community. Identified grantee leads were invited to participate in a 90-minute interview to share details about their use of volunteers (e.g., number of volunteers, number of hours contributed, volunteer roles) and share lessons learned for recruiting, screening, training, and retaining volunteers. As an outcome of the interviews with target grantees, some participants also suggested other grantees to target for the outreach. Project staff reached out to all suggested contacts and invited those who expressed interested in participating.

Participants represented nine different grantee programs that use volunteers to provide ACL-funded services and supports.

In the third and last step, participating grantees were also asked during the interview if they would be willing to invite one of their volunteers to participate in a 1-hour interview to share their experiences in volunteering with the program. Project staff reached out to six volunteers, all of whom agreed to participate. The six volunteers represented three different types of programs (i.e., Home-Delivered Meals [HDM], Long-Term Care Ombudsman Program [LTCOP], and SHIP).

The flowchart on the next page shows the ACL programs and grantee programs the participants represented at each of the three levels (federal, grantee, volunteer).

Regional Administrators

Aging and Disability Services | **Aging Services** | **Healthcare Information and Counseling**

1

- No Wrong Door Initiative
- Supportive and Caregiver Services
- Elder Justice and Adult Protective Services
- American Indian, Alaskan Native and Native Hawaiian Programs
- State Health Insurance Assistance Program (SHIP), Senior Medicare Patrol (SMP), Medicare Improvements for Patients and Providers Act (MIPPA)
- Alzheimer's Disease Programs Initiative
- Long-Term Care Ombudsman Program
- Title VI Programs
- Nutrition and Health Promotion Programs
- Legal Assistance Services

2

Louisiana SUA (Office of Elder Affairs)
Louisiana Capital AAA
California AAA (Ventura County)
Wyoming Senior Center (the Hub on Smith)
Maryland Home Delivered Meals (HDM) Program (Cecil County)
Maine Health Promotion/Evidence-Based Programs (Healthy Living for ME)
California LTCOP (San Luis Obispo County)

Florida Dept. of Elder Affairs
Michigan Medicare/Medicaid Assistance Program

3

HDM Volunteers (N=2)
LTCOP Volunteers (N=2)

SHIP Volunteers (N=2)

(1) ACL Centers and programs represented by ACL participants; (2) state and local program represented by grantee participants; (3) volunteer participants and their program affiliation