



Senior Corps 2.0
Experience for the Future

Experience for the Future



New Project Directors' Orientation

Senior Companions Make Independence a Reality

Presentation 3

Volunteer & Station Management



Corporation for
**NATIONAL &
COMMUNITY
SERVICE**



●●● **Module 3:** *Volunteer & Station Management*

Agenda

- Welcome
- Managing Stations and Volunteers
 - Volunteer Stations
 - Volunteer Assignments
 - SCP Volunteers
 - SCP Volunteer Cost Reimbursements
 - Community Partners and Collaboration
- Introduction to Webinar 4: Budgets and Reports



●●● *Agency-Wide Performance Measures*

The Corporation for National and Community Service (CNCS) has identified 16 agency-wide performance measures that support the ongoing measurement and assessment of our work. These performance measures align with our 2011-2015 Strategic Plan and the Edward M. Kennedy Serve America Act's focus on impact, innovation and effectiveness

For SCP, national performance measures will be phased in across three years. Each grantee will adopt the new performance measures based on their performance period. SCP renewal grants applications submitted in 2013, 2014, and 2015 will include the agency-wide performance measures.

SCP continuation applications will use the project's existing performance measures under the "Programming for Impact" model, or they may adopt the agency-wide measures by typing them into the existing work plan sections in eGrants.



●●● *Agency-Wide Performance Measures*

SCP Agency Wide Performance Measure Requirements Summary

- Senior Companion grantees must engage at least 90% of their unduplicated volunteers in work plans that result in Agency-Wide Outcomes within the Healthy Futures Focus Area (Independent Living or Respite Care).
- Senior Companion grantees may place up to 10% of volunteers in other output areas.



●● Chapter 6: *Volunteer Stations*

SCP Volunteer Station:

A public agency, secular or faith-based private non-profit organization, or proprietary health care organization that accepts the responsibility for assignment and supervision of Senior Companions in health, education, social service or related settings such as multi-purpose centers, home health care agencies, or similar establishments. Each volunteer station must be licensed or otherwise certified, when required, by the appropriate state or local government. Private homes are not volunteer stations. [45 CFR 2551.12(w)]

Compliance Section A.9-A.11



●● Chapter 6: *Volunteer Stations*

Memorandum of Understanding (MOU)

The Memorandum of Understanding, which must be negotiated prior to placing volunteers, describes program requirements, working relationships, and mutual responsibilities of the station and the sponsor. It includes general conditions applicable to all projects and volunteer stations and special conditions applicable to the local volunteer station. The basic requirements for the Memorandum of Understanding are found in the program regulations at 45 CFR 2551.23(c).



●● Chapter 6: *Volunteer Stations*

Responsibilities of Volunteer Stations

Volunteer stations are responsible for the supervision of Senior Companions on assignment. The quality of supervision or support is the most critical factor, after the assignment itself, in contributing to the success of the volunteer experience.

Supervision includes:

- (1) Developing individual volunteer assignment plans.
- (2) Providing regular supervision of Senior Companion performance on assignments.
- (3) Monitoring volunteer activities regularly to assure that Senior Companions and clients are satisfied with the assignment and to determine the continued appropriateness of the assignment.
- (4) Helping Senior Companions arrange for services that benefit clients.
- (5) Annually completing written volunteer performance appraisals.
- (6) Referring Senior Companions to project staff for possible reassignment, transfer, or termination.
- (7) Carrying out other responsibilities identified in the Memorandum of Understanding, Letters of Agreement, and individual plans



●●● Chapter 6: *Volunteer Stations*

Letters of Agreement for In-Home Assignments

Most Senior Companion volunteers serve clients in private homes. Volunteer stations managing in-home placements must develop a Letter of Agreement authorizing and describing the Senior Companion's activities in each home.

The requirement for Letters of Agreement is incorporated in the Memorandum of Understanding with the volunteer station.

Compliance Section: A.11.



●● Chapter 6: *Volunteer Station*

Common Compliance Findings

- Out of date MOU
- MOU does not contain the required non-discrimination commitment
- Volunteers are not attached to a station with a current MOU, with a designated volunteer supervisor.
- For-profit day cares as stations
- No verification of stations non-profit status

Compliance Section: A.9, A.10, A.12, B.2 .(f)



●● Chapter 6: *Volunteer Station*

Common Questions

- What are proprietary health care facilities?
- Is there a role for SCP volunteers in a proprietary health care facility?

Compliance Section: A.9, B.2 (f)(2)



●● Chapter 7: *Senior Companion Assignments*

Senior Companion Volunteer Activities

The Senior Companion Program provides grants to qualified agencies and organizations for the dual purpose of engaging persons 55 and older, particularly those with limited incomes, in volunteer service to meet critical community needs; and to provide a high quality experience that will enrich the lives of the volunteers. Program funds are used to support Senior Companions in providing supportive, individualized services to help older adults with special needs maintain their dignity and independence. [45 CFR 2551.11]



●● Chapter 7: *Senior Companion Assignments*

What requirements govern the assignment of Senior Companions?

- (a) Senior Companion assignments shall provide for Senior Companions to give direct services to one or more eligible adults.
- (b) Senior Companions may serve as volunteer leaders, and in this capacity may provide indirect services. Senior Companions with special skills or demonstrated leadership ability may assist newer Senior Companion volunteers in performing their assignments and in coordinating activities of such volunteers.
- (c) Senior Companions shall not provide services such as those performed by medical personnel, services to large numbers of clients, custodial services, administrative support services, or other services that would detract from their assignment.

[45 CFR 2551.71]



●● Chapter 7: *Senior Companion Assignments*

Is a written volunteer assignment plan required for each volunteer?

- (a) All Senior Companions performing direct services to individual clients in home settings and individual clients in community-based settings, shall receive a written volunteer assignment plan developed by the volunteer station.
- (b) If there is an existing plan that incorporates paragraphs (a)(2), (3), and (4) of this section, that plan shall meet the requirement.
- (c) All Senior Companions serving as volunteer leaders shall receive a written volunteer assignment plan developed by the volunteer station.

[45 CFR 2551.72]



●● Chapter 7: *Senior Companion Assignments*

Examples of Appropriate Senior Companion Volunteer Activities

- Assisting homebound clients served by caregivers
- Accompanying a person to a doctor or nurse for treatment.
- Encouraging exercise, taking walks with client, providing information on exercise or recreation.
- Planning meals, doing light grocery shopping, labeling, and organizing food.
- Providing companionship, talking, listening, cheering up, and playing games.
- Light shopping, doing errands.
- Writing letters, reading, and filling out forms.
- Helping clients receive a needed service (visiting nurse, Medicaid, Medicare, etc.).
- Bringing unmet needs to the attention of volunteer station staff, and other care providers.



●● Chapter 7: *Senior Companion Assignments*

Examples of Inappropriate Volunteer Activities

- Activities usually performed by doctors, nurses, or other professionals.
- Brief, casual contact with a large number of clients.
- Custodial services normally provided by paid staff.
- Advance funds to clients.
- Deposit cash in banks.
- Major household repair.
- Snow shoveling, lawn mowing.
- Major house cleaning.
- Extensive shopping.
- Food preparation for persons other than adult served.
- Leading group recreational or social activities.



●● Chapters 8: *Senior Companions*

Eligibility to be Enrolled

Applicant must be:

- 55 years of age or older
- determined by a physical examination to be capable of serving without detriment to either themselves or the children served.
- willing to serve 15-40 hours per week.
- willing to abide by the program requirements.
- Must meet income eligibility requirements, to receive a stipend .
- Must receive criminal background check clearance.

Eligibility to be a Senior Companion may not be restricted on the basis of formal education; experience; race; religion; color; national origin, including limited English proficiency; sex; age; handicap; or political affiliation. [45 CFR 2551.41(b)]

Compliance Monitoring: A.13.-14, A. 19-21, B.2.



●● Chapters 8: *Senior Companions*

Criminal Background Checks

Under the Serve America Act , all CNCS grantees must conduct National Service Criminal History checks on participants and program employees in AmeriCorps, Learn and Serve, Foster Grandparent, Senior Companion and any other programs funded by the Corporation under National Service laws. All employees, participants, and others who receive a salary, national service education award, living allowance, or stipend under Corporation grants, even if the activities don't involve service with vulnerable populations, must receive the checks prior to beginning employment or service.

Compliance Monitoring: A. 19-21



●●● Chapters 8: *Senior Companions*

Recruitment of Foster Grandparent Volunteers

- Project recruitment plans should be outlined in the Recruitment and Strengthening Communities narrative of the project grant.
- Take potential placement sites into consideration when recruiting.
- Invite existing SCP volunteers to help recruit.
- Use Social Networking.
- Keep your Volunteer Match listings current.



●●● **Chapters 8: *Senior Companions***

Orientation and Training

The sponsor provides not less than 40 hours of orientation to Senior Companions – of which 20 hours must be pre-service orientation – and an average of four hours monthly of in-service training.

Pre-service orientation and in-service training are an integral part of project operation. They should be designed to build on and enhance existing skills and to provide the Senior Companions with new information relative to their assignments and personal welfare.

Compliance Sections: A.18



●● Chapters 8: *Senior Companions*

Pre-Service Orientation

The goals of pre-service orientation are to:

- Introduce the Senior Companions to the Corporation, the Corporation's Strategic Plan, the Corporation's programs in general, the Senior Companions Program in particular, the sponsor, and the local SCP project.
- Provide information on project policies, appeal procedures, timesheets, insurance, and other administrative details.
- Acquaint the Senior Companions with project sponsor staff, station staff, and with other Senior Companions.
- Give Senior Companions the opportunity for on-site visits to volunteer stations served by the project prior to assignment, enabling them to make informed choices about the types of volunteer stations and assignments for which they are best suited.
- Provide new Senior Companions with information they will need to understand clients' needs.



●● Chapters 8: *Senior Companions*

Volunteer Separation

A sponsor may remove a Senior Companion from service for cause. Grounds for removal include but are not limited to: extensive and unauthorized absences; misconduct; inability to perform assignments; and failure to accept supervision. A Senior Companion may also be removed from service for having income in excess of the eligibility level.

The sponsor shall establish appropriate policies on service termination as well as procedures for appeal from such adverse action. [45 CFR 2551.53]



●●● **Chapters 8: *Senior Companions***

Common Compliance Findings

- Over-income volunteers
- No documentation of pre-service and/or in-service training
- No evidence of annual physical on file
- No annual performance evaluation on file
- No evidence of required criminal background check on file



Chapter 9: *Cost Reimbursement and Volunteer Benefits*

Cost Reimbursements

Senior Companions are provided with cost reimbursements and other benefits. Within the limits of a project's approved budget, and in accordance with the 45 CFR 2551.46 and written Senior Corps policy guidance to projects, volunteers are provided stipends, transportation, meals, accident and liability insurance, annual physical examination, uniforms when appropriate, and recognition activities. Cost reimbursements are budgeted as "Volunteer Expenses," and the two terms may be used interchangeably.



●●● **Chapter 9: *Cost Reimbursement and Volunteer Benefits***

Cost Reimbursements

Sponsors should establish written cost reimbursement policies and procedures and share with each volunteer when they enroll.

Polices should be developed that include:

- a. Assignment-Related Expenses
- b. Volunteer Expenses Ratio
- c. “Income Disregard”
- d. Non-Reimbursed Volunteer Expenses
- e. Non-Corporation Funded Senior Companions



Chapter 9: *Cost Reimbursement and Volunteer Benefits*

Recognition

At least annually the SCP sponsor plans and arranges for formal public recognition of SCP volunteers for their service to the community. Sponsors are also authorized to recognize local individuals and agencies or organizations for significant activities that support project goals

- Recognition events may consist of special ceremonies, teas, breakfasts, luncheons, and recreational outings at which pins and certificates for stipulated terms of service are awarded.
- The SCP Community Advisory Group and volunteer stations are expected to participate in recognition activities.
- Volunteer Stations and the Community may contribute: Space, food, decorations, or transportation, to enhance the experience for the volunteers.
- CNCS field staff, as well as city and county officials and officers of local organizations may be invited to recognition events.

Compliance E.4, E.5



Chapter 12: *Community Partners*

Senior Corps programs should partner with other national service programs and other community organizations in order to:

- Assess the needs in the community/service area:

SCP : 45 CFR2551.23: A sponsor shall....(b) Assess in collaboration with other community organizations or utilize existing assessment of the needs of the client population in the community and develop strategies to respond to those needs using the resources of Senior Companions.

- Build public awareness of and support for the program within the community.
- Enhance the capacity of organizations and institutions within the community
- Work to integrate senior service into the activities of other service programs within the community
- Work toward common goals in local communities, complementing and reinforcing each other's contributions through activities related to Days of Service, Strategic Initiatives, and other local service initiatives.



●● Chapter 12: *Community Partners*

Opportunities to showcase your program and recognize Senior Volunteers:

- Recognition Events
- Senior Corps Week: Annually in May
- Stories of Service Blog
- United We Serve
- Martin Luther King Jr. Day of Service
- 9/11 National Day of Service and Remembrance

Remember you can find public relations resources at GetInvolved.gov



●●● Next Steps for Module 3: *Volunteer & Station Management*

Next Steps:

Follow-Up from Module 3:

- Review your MOU template.
- Are all MOUs current?
- Are you satisfied with the current MOU, assignment descriptions, enrollment forms, and cost reimbursement policies used by your program?
- Are appropriate policies in place for volunteer terms of service and service separation in your project?
- **Consultation: *Discuss any questions you have about Module 3 with your Program Officer.***



●●● Preparation for Module 4: *Budget, Reports and Fiscal Management*

Next Steps

Prior to Presentation 4 please complete the following Preparation Activities:

- Review SCP Operations Handbook: Chapters: 10 & 11
- Review *Senior Corps Compliance Monitoring Guide* :Section C
- 2010 Supplement to the Senior Corps Handbook: Section 4: Data Integrity, Reporting, and Measuring Results- Page 14-18
- Review the Budget Section of your current grant.
- Please complete the Online Course: *Preparing the Grant Budget for Senior Corps Projects*:
<http://nationalserviceresources.org/online-courses/preparing-the-grant-budget-for-seniorcorps-programs>



●●● **Module 3: Web Links – Page 1**

- 2011-2015 Strategic Plan: <http://www.nationalservicerresources.org/2011-strategic-plan>
- Priority Measures chart: <http://www.nationalservicerresources.org/npm/agency-wide-measures>
- SCP - Senior Corps Performance Measures: <http://www.nationalservicerresources.org/npm/scp>
- Other CNCS programs in your state:
http://www.nationalservice.gov/about/role_impact/state_profiles.asp
- Stories of Service Blog: http://www.serve.gov/stories_all.asp
- United We Serve: www.serve.gov/



●●● **Module 3: Web Links – Page 2**

- Martin Luther King Jr. Day of Service <http://mlkday.gov/>
- 9/11 National Day of Service and Remembrance <http://www.serve.gov/sept11.asp>
- Public relations resources: www.getinvolved.com
- Recognition: <http://www.nationalservicerresources.org/volunteer-member-staff-management/recognition>
- Effective Practice Database: <http://www.nationalservicerresources.org/effective-practice>
- Preparing the Grant Budget for Senior Corps Projects: <http://nationalservicerresources.org/online-courses/preparing-the-grant-budget-for-seniorcorps-programs>