



Impact and Innovation: Effective Models and Practices in Serving Older Adults



CASE STUDIES JANUARY 2010

Prepared for:
Alliance for Children and Families
New Age of Aging Initiative
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The Alliance for Children and Families, headquartered in Milwaukee, Wis., is a nonprofit membership organization representing more than 340 child- and family-serving and economic empowerment organizations in the United States and Canada.

Members of the Alliance, which will celebrate its 100th anniversary in 2011, are private, nonprofit human service organizations providing a vast array of community-based programs and services to all generations that strengthen communities. Essential services such as residential care, adoption, foster care, child care, job counseling and training, and elder care are provided by Alliance members in both rural and urban communities.

The Alliance public policy staff, operating in Washington, D.C., works with federal, state, and local lawmakers to advocate for legislation promoting healthy children and families.

Motivated by a vision of a healthy society and strong communities, the Alliance also works to strengthen America's nonprofit sector and through advocacy assure the sector's continued independence.

More information about the Alliance is available at alliance1.org.

Alliance for Children and Families mission and vision:

Our **MISSION** is to fuse intellectual capital with superior membership services in order to strengthen the capacities of North America's nonprofit child- and family-serving organizations to serve and to advocate for children, families, and communities so that together we may pursue our **VISION** of a healthy society and strong communities for all children and families.

Contents

- ii Alliance for Children and Families
- iii New Age of Aging
- iv Introduction to and Purpose of Impact and Innovation: Effective Models and Practices in Serving Older Adults
How to Use Case Studies
- v Case Studies:
 - A Alpert Jewish Family & Children's Service
 - B Community Service Society of New York
 - C Family Centers
 - D Family Lifeline
 - E Family Services of Montgomery County
 - F Family Services of Westchester
 - G Jewish Family Services
 - H Personal and Family Counseling Services of Tuscarawas Valley
- vi Methodology
- vii Acknowledgements



The New Age of Aging, a five-year initiative of the Alliance for Children and Families, is working to become a change agent as well as build solutions that bridge the gap between the human services community and the dynamics associated with a growing aging population.

As a result of the dramatic demographic changes associated with the 70 million adults who will reach the traditional retirement age of 65 in the year 2029, the use of supportive social and human services by older adults will accordingly increase.

The current deficiencies in social and human service practice for older adults—particularly the lack of attention to emotional/social needs and the strengths specific to this rapidly growing population—will only intensify in the future

unless a comprehensive transformation in social and human service gerontological practice occurs. Further exacerbating these deficiencies is the reluctance of workers to enter the field of aging.

In 2005 and 2006 the Alliance, in collaboration with The Atlantic Philanthropies, implemented and completed a 10-month planning phase to create an impetus for broad and thoughtful change in the attitudes, behaviors, practices, programs, and policies related to social and human service gerontological practice.

Upon completion of the planning phase, the Alliance was invited to submit a proposal to The Atlantic Philanthropies for a comprehensive, grant-funded initiative. The Alliance was awarded \$2.6 million to fund its five-year initiative—now known as the New

Age of Aging—to influence member agencies and their staff to implement a culture within their organization that is more responsive to the needs and strengths of older adults.

Based on research information from the planning phase, the initiative's planned activities focus on three major areas: change in Alliance member agency practice, impact on older adults' lives, and transformation within the Alliance.

Thus, since its inception in 2007, the New Age of Aging initiative has represented a comprehensive approach to responding to the needs of the rapidly increasing number of older adults by improving the readiness of the nation's nonprofit human service workforce.

With the implementation knowledge development opportunities, networking, communication efforts, and pilot and demonstration programs through re-grants, the Alliance and the New Age of Aging initiative are helping member agencies build the competency and capacity in aging, while also creating new ideas to address challenges related to the physical, social, and emotional needs of this new generation of older adults.

For human service providers, targeted outcomes for the New Age of Aging initiative include improved capacity for offering older adult services. For the Alliance, it is also improved capacity to provide support for aging services through knowledge sharing and enhanced staff skills, as well as recognition as an aging resource and expert, with a demonstrated commitment to the field.

More information is available at newageofaging.org.



Introduction To and Purpose of Case Study Report

The members of the Alliance are an extraordinary group of mission-driven human service providers offering a wide range of services to thousands of communities and millions of people each year.

Within this extraordinary group are eight organizations chosen for Impact and Innovation: Effective Models and Practices in Serving Older Adults due to their successful programs targeting older adults. Collectively, the eight programs demonstrate community need and impact, innovation, attention to diverse populations, and collaboration.

As the first of two reports to be released prior to 2012, Impact and Innovation: Effective Models and Practices in Serving Older Adults is an important component of the New Age of Aging initiative. It serves as a method of communication to enable Alliance members to learn from their peers by highlighting interesting and reflective programming and practices.

Overall, this case study report provides reinforcement and motivation to members within the Alliance and other nonprofit human service organizations that successfully use the social work profession to respond to the needs of older adults.

One of the goals for the New Age of Aging is to provide access to cutting-edge information, quality practices, and effective-oriented models of human and social service interventions that reflect values of excellence, collaboration, creativity, and advocacy.

That is why Impact and Innovation: Effective Models and Practices in Serving Older Adults is designed to help readers identify potential gerontological human service and social work practice models, demonstrate strength-based practice, and offer insights into the expertise and resourcefulness of Alliance member organizations.

The eight programs and organizations featured in this report:

Ambassadors Program, Alpert Jewish Family & Children's Service of Palm Beach County, West Palm Beach, FL

Retired & Senior Volunteer Program: The Boomer+ Program, Community Service Society of New York, NY

Friendly Connections, Family Centers, Greenwich, CT

ElderFriends, Family Lifeline, Richmond, VA

Project HEARTH, Family Services of Montgomery County, Eagleville, PA

My Second Home/JEWEL, Family Services of Westchester, Port Chester, NY

Honor Your Aging Parents Wellness Program, Jewish Family Services, Milwaukee, WI

Senior Outreach Program, Personal & Family Counseling Services of Tuscarawas Valley, New Philadelphia, OH

How to Use this Case Study Report

This report, Impact and Innovation: Effective Models and Practices in Serving Older Adults, is a learning tool to identify potential gerontological human service and social work practice models, demonstrate strength-based practices, and offer insights into the expertise and resourcefulness of Alliance member organizations.

The eight Alliance member organizations featured in the report have been very forthcoming with details of their successful programs, even offering numerous tips for replication. An intimate understanding of everything from the funding, to the challenges and lessons learned allows both Alliance members and other nonprofit human service organizations to gain information on the whole of each program.

The New Age of Aging has developed this report because it is an opportunity to not only learn what others are doing, but also stimulate discussion on your own capacity to add older adult services to your complement of services. Use this report as a tool to further those discussions and examine whether you can implement similar programs as a way to get into the older adult social services arena.

The New Age of Aging provides other ways to learn more about serving older adults such as mini-grants and mentoring grants, among other services. Go to newageofaging.org for more information.

Alpert Jewish Family & Children's Service, West Palm Beach County, Florida

Ambassadors Program

Joan, an ambassador in the Alpert Jewish Family & Children's Service Ambassadors Program, sent an email to the Ambassadors Program community engagement coordinator which personifies the approach of the program.

She asked for advice on how to approach the children of her elderly neighbor, who she was concerned about. "Beatrice, my neighbor of 10 years, was recently widowed ... she seems in a terrible way," the message read. "The children are aware of her struggles these past few months and until now I didn't think she could even deal with asking for help, but she seems a little better and coming out of the emotional fog she was in.

"In spite of my encouraging her I am concerned and I feel like she is still going downhill. Needless to say, I am very concerned as I will be away for Thanksgiving and I do not know what more I can do.

"I will suggest to her that as the ambassador I would like to coordinate her talking with a professional at Alpert Jewish Family & Children's Service who might also be able to talk with Beatrice's children. I think she needs grief counseling, transportation, and an emergency response plan since she lives alone and has shared that she is scared to be by herself. I am so grateful that you are there to offer your help. There are so many frustrations and limitations in these cases for a novice as me, as you well know. Glad to know that your resources and expertise are available."



Program Description

Created in 2008, the Alpert Jewish Family & Children's Service (Alpert) Ambassadors Program, which is a strategic model, uses a community-building and civic engagement model to promote aging in place. This nontraditional, grassroots strategy is a natural outgrowth of the Naturally Occurring Retirement Communities (NORC) program and paid companion program for older adults at Alpert.

The program engages older adult volunteers who live within gated senior communities to support their frail neighbors. A neighbor-helping-neighbor network is created whereby residents assist and advocate for one another and build a comprehensive safety net for their community. In addition, it offers older adult volunteers with meaningful service and lifelong learning opportunities, while also enhancing the agency's capacity.

Population Served

The Ambassadors Program targets older adults and baby boomers in the mixed



urban/suburban service area of Alpert. This area encompasses numerous gated senior communities. The majority of these older adults do not have a family member living within 50 miles, and there is no natural intergenerational support within these communities. Public transportation is limited. A growing population of older adults in these communities are physically, socially, and emotionally isolated. Those who might be able to live alone with minimal assistance often fall through the cracks.

More than 21 percent of the population of the county Alpert serves is age 65 and older. Of these, 68 percent are Jewish and 99.9 percent are Caucasian. More than 42 percent of the older adults in the local community are on a fixed income which is at poverty level or below. Providing services to the elderly has been defined as a top priority in the county, where more than 20,000 older adults are on a waiting list for various supportive services.

Program Components

The main program components are education, community organizing, and mobilization. When the Ambassador Program was first initiated, the agency often identified a specific gated community and recruited people to be “ambassadors” within that community. As people become aware of the need, ambassadors usually are self-identified. Now that people have learned of the program through word of mouth, volunteers contact the agency to offer their services within their gated community.

Ambassadors are not directed by agency staff, do not have prescribed roles and responsibilities, and are not matched with specific agency clients. Rather, ambassadors determine the extent of their involvement, identify those in need, and define their activities based on their unique talents and concerns and on the needs within their gated community.

Ambassadors serve as community organizers. They are problem solvers, liaisons, resource specialists, peer counselors, and agency envoys. Services might include phone calls, home or hospital visits, transportation, assistance

with grocery shopping and other daily living needs, provision of information, presentations on educational topics, and linkage to other supportive resources. Because they live within the community themselves, ambassadors serve as an early warning system for those in need.

Alpert’s community engagement coordinator oversees the Ambassadors Program. The Community Directions Division, which provides information, intake and referral, provides training and resources.

Outcomes

In less than two years, the Ambassadors Program served more than 200 people in 21 communities. Today, it engages more than 80 active ambassadors and provides a combined total of 1,100 hours of support service to over 500 people semi-annually. Ambassadors have initiated and offered more than 150 educational presentations and made dozens of referrals to formal social services on behalf of the older adults they support.

Why It Works

A key to the success of the program is Alpert’s deep roots and longstanding reputation. Alpert already provides numerous services to older adults living in these communities. That provided an entry point to introduce the Ambassadors Program and recruit potential ambassadors. In addition, the agency staff takes every opportunity to educate individuals and groups about aging issues.

There is a monthly ambassador meeting that creates a natural reference group, with ambassadors learning from and supporting each other. Ambassadors always have access to professional back-up. The ambassadors are natural leaders who mobilize others within their community to help their neighbors age safely in place.

There is no “one size fits all” program. Each community that the Ambassadors Program serves has different needs and each volunteer brings different skills and interests. Thus, the program varies from location to location, person to person.

Program Funding

A full time community engagement coordinator oversees the Ambassadors Program, in addition to other outreach responsibilities. This position is funded through the Alpert operations budget.

The agency received a mini-grant for peer counselor training from the Alliance for Children and Families New Age of Aging initiative. Another mini-grant from the New Age of Aging will enable formation of a Leadership Ambassador Team, which will represent a number of communities, have stronger agency ties, and focus on the multi-faceted issues of aging.

Collaborations

In addition to the support of the Alpert Community Directions Division, the Ambassadors Program engages numerous community organizations. They provide training and resources so ambassadors can disseminate information and facilitate linkages within their gated communities.

Marketing Efforts

Agency wide, staff and volunteers distribute flyers about the program at almost every program and presentation. The program is marketed at synagogues and other gathering places, through the agency newsletter, and on its website. The Ambassadors Program is presented as a strategic model at workshops and conferences, and recently was featured at the Florida Council on Aging conference.

Within local communities, the program grows through word of mouth. Ambassadors enlist other neighbors and friends who want to help. Likewise, people who need services hear from neighbors about how they were helped and they then contact an ambassador.

Lessons Learned

Alpert has learned a number of lessons while implementing the Ambassadors Program, they include:

- An initial challenge was engaging at least one natural leader from each

gated community. Once identified, however, those volunteers engage other volunteers and a collective, grassroots process is initiated.

- The process of growing the volunteer-driven ambassadors model takes time, especially since every community is different. Patience and attention to process is critical.
- Enlisting the gated community homeowners association for help in creating an Ambassadors Program is usually unsuccessful. Homeowners associations typically are concerned about security and facilities maintenance rather than caring for residents. Some gated communities have activity directors, and the agency often found a way into the community by presenting a class or program.
- Funders want to see outcomes measurements and program impact, which are difficult to measure. The agency evaluates program success by output measures, such as how many volunteers are engaged, how

many communities have an active ambassador program, and how many lives were touched.

Because the Ambassadors Program is innovative, it is challenging to articulate. Over time, the agency has developed a logic model that identifies short-term, intermediate, and long-term program goals. This strategic model promotes aging in place and avoidance of inappropriate placement of older adults.

Guidelines for Replication

The Ambassadors Program can be replicated, not only for older adults but for other populations as well. Alpert is happy to provide advice and guidance to other organizations interested in replication.

Keys to program success include:

- Fully commit to the strategy of engaging nontraditional volunteers. Understand that this requires some out-of-the-box thinking.
- Identify natural leaders as volunteer ambassadors who have their pulse on the needs of their community.

- Be flexible and responsive to each community's unique culture and support systems.
- Agency professional staff must be available as back-up to ambassadors 24/7.
- Volunteer ambassadors must come together as a group a minimum of once a month. This meeting provides ongoing training, structure, support, problem solving, and affiliation with the agency.

The Ambassadors Program promotes aging in place and builds social capital by fostering connections, trust, mutual aid, neighborliness, and collective action among defined senior communities. ■

Quick facts about Alpert Jewish Family & Children's Service:

Ferd & Gladys Alpert Jewish Family & Children's Service
PO Box 220627
West Palm Beach, FL 33422
jfcspb.org

Ambassadors Program contact:

Jenni Frumer, Associate Executive Director, 561-684-1991, jfrumer@jfcsonline.com

Alpert Jewish Family & Children's Service is a nonprofit social service

agency and a beneficiary of the Jewish Federation of Palm Beach County, Inc. It is a full-service family agency helping



people of all ages and faiths with a variety of needs in Palm Beach County, Florida. This nationally-accredited, full-service agency has a seasoned staff of highly trained professionals and volunteers. It helps strengthen families by providing assistance through all stages of life, whether it's helping Holocaust survivors, counseling families, geriatric care management, or providing residential services for disabled adults, AJFCS is there.

Mission: The mission of Alpert Jewish Family & Children's Service is to serve the Jewish Community and fulfill its obligation of TIKKUN OLAM by:

1. Serving the Jewish Community primarily but not exclusively;
2. Providing a wide range of needed social services to strengthen individuals and families;
3. Participate in identifying, addressing, and assisting in the coordination of community needs;
4. Fulfill its mission guided by Jewish traditions and values. and to realize social, economic, and political opportunities.



Community Service Society of New York, New York City

Retired and Senior Volunteer Program: The Boomer+ Program

After four years of taking care of her mother who died of Alzheimer's disease, Elizabeth left Long Island and moved to New York City. She had resigned her job to care for her mother, so she decided to do volunteer work. "But what? Hold new babies in a hospital? Read to the blind? None of that held any appeal to me," Elizabeth said. She admired those who do that work, but felt she needed the kind of constant challenge that her prior career had provided.

She attended a meeting of The Transition Network, which helps women age 50 and older make life and career transitions. There, she listened to Gajtana Simonovski recruit for RSVP's Boomer+ Program that places professionals in volunteer positions suited to their skills.

Simonovski shared that she was looking for professionals with a wide range of skills, including program evaluation. The two women began working closely together doing program evaluations, checking surveys, writing and editing reports, and solving problems. Simonovski would talk through issues with her new volunteer, who just happened to hold a doctorate and was trained in research evaluation.

"It gave me confidence to know that my skills were still very valuable," Elizabeth added. Caregiving was draining, and being out of the workforce for four years had made her doubt her currency as a professional. But, in fact, the volunteer job led her back into the workforce as a consultant.



Program Description

Community Service Society (CSS) initiated the Retired and Senior Volunteer Program (RSVP) in 1966. The program has been replicated nationwide and today is one of the largest older adult volunteer programs in the United States. In 2007, the agency launched the RSVP Boomer+ Program, one of 12 such pilot programs nationwide.

The Boomer+ Program meets two distinct needs. It keeps older adults active through meaningful, challenging civic engagement that leverages their professional and leadership skills. It also helps the nonprofit sector build organizational capacity. Going forward, CSS will train other nonprofit organizations to effectively engage this new population of volunteers and will place the Boomer+ Program volunteers with other nonprofit organizations.

Population Served

Like RSVP, the Boomer+ Program is targeted to adults age 55 and older. The Boomer+ Program recruits volunteers from New York City, representing diverse ethnic groups, languages, and socioeconomic

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levels. According to CSS, unlike some traditional volunteers, this new generation of volunteers wants to use its professional and leadership experience in a meaningful volunteer experience.

Program Components

CSS began with an internal needs assessment to determine what capacity-building roles volunteers were needed to fill within the agency. Current volunteers with strategic planning expertise helped conduct the needs assessment, and created a strategic plan.

To attract, engage, and retain the capacity-building volunteers the agency needed, CSS first completed extensive research and networking. Staff members participated in a learning lab on developing a capacity building volunteer program offered at The Intergenerational Center at Temple University. The agency interviewed its own volunteers age 55 and older who helped in capacity-building roles to ascertain their interests and motivations. It also networked with other nonprofits using this volunteer population to learn more from their experiences.

The concept of volunteers fulfilling professional and leadership roles is new for some individuals. CSS worked with volunteer marketing specialists to develop recruitment messages that resonated with the targeted volunteer pool. The Boomer+ Program also implemented an Ambassador Program in which trained volunteers, serving in teams of two, recruited volunteers by reaching out to new groups of potential volunteers and presenting at volunteer fairs.

All Boomer+ Program volunteers participate in a personalized one-on-one interview to ascertain their skills, interests, and motivation for volunteering. Initially, CSS staff interviewed prospective volunteers. As the program grew, a team of trained Boomer+ Program volunteers took over interviewing and matching volunteers with assignments. CSS learned quickly that this initial interview was the time to provide a clear picture of the agency's expectations and goals so volunteers understand how they will be contributing to the organization. This helps volunteers feel welcome and like a staff member, it also engages them in their role and increases retention.

Volunteers are offered a menu of placement options, and CSS works with volunteers to help them create their own roles and responsibility within the needs of the agency. Many volunteer assignments can be accomplished in just a few hours a week at the placement location; some can be done virtually from home. As volunteers became more immersed in the program and more comfortable with the concept of volunteer management, they increasingly are willing to assume professional and leadership roles previously filled by paid staff members.

Volunteers work on both short- and long-term assignments in activities such as public relations, outreach, marketing, special events, strategic planning, and training. CSS had no push-back from staff worried that a volunteer would take their job. Instead, staff members welcomed the professional help.

Initially, staff trained the Boomer+ Program volunteers. Now, veteran Boomer+ Program volunteers provide much of the training. CSS learned that these volunteers are especially interested in additional professional development opportunities to continue to build their skills. Training is provided in-house by staff and volunteers as well as through community partners. A high school student even provided training on the importance of social networking tools such as Facebook and Twitter.

Retention in the program is high because CSS works to create a good fit for volunteer assignments and to reward the volunteers in ways that are meaningful to them. Bi-monthly program planning meetings facilitate constant communication and brainstorming of new approaches, thus maximizing program efficiency and effectiveness.

Through formal and informal surveys, CSS found that in addition to professional development opportunities, a majority of Boomer+ Program volunteers are active because they want to make a meaningful contribution and they want to feel like part of a team. Based on these findings, CSS reinforces the team concept by calling both volunteers and paid staff the "The Boomer+ Program

Quick facts about Community Service Society of New York:

Community Service Society of New York
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New York, NY 10010
cssny.org

RSVP: The Boomer+ Program contact:
Gajtana Simonovski, Project Director,
212-614-5563, gsimonovski@cssny.org

Community Service Society of New York (CSS) is a 160-year-old institution that has been on the cutting edge of public policy innovations to support poor New Yorkers in their quest to be full participants in the civic life of the nation's largest city. CSS employs a variety of tools—advocacy, direct service, research and policy analysis, and strategic partnerships—to forge consensus on appropriate policy interventions to facilitate the economic mobility of low-income New Yorkers.

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New York

Mission: The mission of Community Service Society is to identify problems which create a permanent poverty class in New York City, and to advocate the systemic changes required to eliminate such problems. CSS will focus on enabling, empowering, and promoting opportunities for poor families and individuals to develop their full potential, to contribute to society, and to realize social, economic, and political opportunities.

Team,” sending e-newsletters, and keeping volunteers abreast of free trainings and personal development events. The Boomer+ Program also offers non-financial incentives for volunteers such as discounted concert and theater tickets, free health and wellness workshops, and more. In addition, a Boomer+ Program recognition luncheon reports on the program’s accomplishments and on each individual volunteer’s contribution.

Disseminating information about the program and helping other nonprofit agencies build capacity through professional volunteers is another program goal. Boomer+ Program staff and volunteers have made many presentations on the program, as well as provided assistance in launching a similar program at dozens of venues. CSS is now building a cadre of Boomer+ Program volunteers, called the Capacity Corps, who will be matched with other New York City nonprofit organizations to help them develop a capacity-building volunteer program at their organization.

Outcomes

CSS has experienced a high return on investment, evidenced by an increase in organizational effectiveness, stronger management, and heightened fundraising capabilities. Boomer+ Program volunteers report a high level of satisfaction with their capacity building role.

The Boomer+ Program has created a paradigm shift in the RSVP program, resulting in a horizontal rather than vertical management model. Staff and volunteers enjoy an equal partnership, working together as a collaborative team to build capacity.

An initial goal of the Boomer+ Program was to recruit and place 15 professional volunteers to help implement the program. This goal was far exceeded, with 50 professional and leadership volunteers recruited and placed. As the program grew, the volunteers themselves took over much of the recruiting and interviewing, conducting nearly 250 interviews and placing another 100 volunteers in assignments.

Another goal is to disseminate program results and help other organizations build a similar program. The Boomer+ Program staff and volunteers developed manuals and curricula for workshops on recruiting and working with professional volunteers; present the program at city, state, and national conferences; offer training workshops and webinars; and provide other outreach and technical assistance.

Why It Works

Most volunteer programs offer only clerical or direct service opportunities, but the Boomer+ Program leverages the professional and leadership experience of its volunteers to provide meaningful volunteer roles that build organizational capacity. The equal partnership between staff and Boomer+ Program volunteers is a key factor in the program’s success.

Funding

Because it is part of the RSVP program, for CSS, the Boomer+ Program has minimal cost to implement and sustain. Boomer+ Program volunteers have taken over most of the responsibility for recruitment, interviewing, and placement.

The Boomer+ Program began with a two-year \$40,000 grant from the National Council on Aging. It is also funded by an Alliance for Children and Families New Age of Aging grant. CSS received a follow-up dissemination grant from the National Council on Aging, and continues to apply for additional funding to train and provide technical assistance to other nonprofit organizations.

Collaborations

The Boomer+ Program seizes every opportunity to further recruitment and training. The Intergenerational Center at Temple University has been a vital partner in providing staff training to help develop the Boomer+ Program. In addition, other organizations that use capacity-building volunteers shared their challenges and successes and that information has assisted the Boomer+ Program. CSS also built a partnership with The Transition Network, an organization of professional

women age 50 and older. Lifelong learning institutions provide access to adults age 55 and older who are interested in the type of experience and civic involvement the Boomer+ Program offers.

As CSS builds the next phase of the Boomer+ Program, it will partner with other New York City nonprofit organizations to help them use these volunteers to build organizational capacity.

Marketing Efforts

CSS implemented a targeted grassroots approach to program marketing. It researched the types of organizations in New York City that might benefit from professional and leadership volunteers. It also looked within its own agency to identify volunteers already serving in a leadership capacity who might be interested in roles with greater responsibility.

With the help of volunteers, the program developed a very focused marketing message that would resonate with this unique population. Messages were tested with existing volunteers and refined as needed. A brochure and PowerPoint presentation were developed to assist in outreach.

As the Boomer+ Program grew, it launched the Ambassador Program, whereby volunteers conduct outreach and recruit prospective volunteers and new nonprofit partners. Sharing the experience of an actual Boomer+ Program volunteer is a very effective marketing tool.

Lessons Learned

Using professional and leadership volunteers in a capacity-building role is a new concept. It takes patience, openness, and education to demonstrate the benefits.

The most critical lesson learned was that these professional and leadership volunteers need to be equal partners with staff. As the Boomer+ Program developed, it shifted from a hierarchical top-down approach with the volunteer manager on top and the volunteer below, to a horizontal approach where volunteers and staff are seen as equal partners within the rubric of volunteer management.

Numerous times, the agency learned that flexibility is crucial. Although the program had a strategic plan with specific goals and objectives, CSS allowed the program to develop organically and that benefited the program and the agency.

CSS listened to volunteers and planned the program around their motivations and interests. It learned to keep volunteer assignments flexible, challenging, and with plenty of opportunity for growth and development. Reinforcing the team concept and giving the Boomer+ Program volunteers new, short-term assignments keeps them continually engaged.

Conflicts can arise when volunteers come from high level positions in the corporate sector and are used to being the boss. It is important to clearly define the boundaries and limits of the program, but also take the volunteer's ideas and thoughts into consideration.

Guidelines for Replication

Through its Capacity Corps pilot, CSS is developing formal replication strategies for the Boomer+ Program. Although it had a strategic plan, the program developed through what CSS has termed the "building the bridge as you're crossing it model." The program infrastructure developed as the program went along.

Several tactics for program replication have emerged:

- Take the time to network, build partnerships and learn from partners not just in your local community, but on a national level.
- Using your own agency as a pilot, conduct a thorough needs assessment to learn where professional and leadership volunteers can most effectively contribute. Invest time in staff education to secure buy-in.
- Conduct research and do an assessment at the onset of the program to identify where your agency might find individuals age 55 and older who are interested in professional and leadership volunteer roles. Develop partnerships with new organizations that have large pools of prospective volunteers.
- Clearly identify your target population, understand their interests and motivations, and create an effective marketing message. Use current volunteers as ad hoc focus groups to test messages.
- When training leadership and professional volunteers, keep in mind that they might know as much, if not

more, than you do about the subject matter. Open, ongoing communication is vital; mutual respect works wonders in smoothing over misunderstandings.

- Be open and creative in using volunteers in the capacities they prefer.
- Keep volunteers engaged with challenging new assignments. Also keep them informed and a part of the overall agency to reinforce the feeling of teamwork.

With baby boomers entering retirement, nonprofit agencies are challenged to effectively engage this new volunteer force in activities that maximize their professional and leadership skills. The Boomer+ Program component of RSVP is a cost-effective, impactful, and highly replicable program to engage these volunteers in building the capacity of nonprofit organizations. ■

Family Centers, Greenwich, Connecticut

Friendly Connections

Mary has found that staying connected, encouraged, and stimulated are important aspects of life—especially since she lives alone. Obtaining these vital qualities, however, has become increasingly difficult for Mary now that her longtime battle with multiple sclerosis has caused exacerbating muscle weakness and near-blindness.

While her condition has left Mary homebound, her longtime participation with Friendly Connections has kept her from feeling isolated from the community. Through Friendly Connections' diverse array of teleconference support and socialization groups, Mary has found a sense of fulfillment she never expected.

She notes that the current events and news discussion groups keep her up to date with the outside world and allow her to create friendships with other participants. Friendly Connections' Happiness Club and Perspectives on Aging also remind Mary about the importance of keeping a positive outlook despite her physical limitations.

When Mary's health took a turn for the worse last summer, Friendly Connections played a major role in her recovery. Following a nasty fall brought on by the decreasing functionality of her legs, doctors were unsure if Mary could regain the strength to walk or the ability to safely live on her own.

Motivated to beat the odds, Mary began what would be five hard months of vigorous therapy at a local rehabilitation facility.



To ward off the feelings of hopelessness, Mary leaned on her fellow Friendly Connections participants for support.

Now back at home, Mary can move about the house with help from a walker. Mary says she's eternally grateful for the support provided by Friendly Connections, and continues to call into groups each day.

Program Description

Friendly Connections is an innovative community-wide program that provides homebound older adults support and services in their home. A program of Family Centers, Friendly Connections was created in 1996 to reduce the risk of isolation and depression that are common risk factors for the homebound elderly through companionship, independent living assistance, wellness services, education, and emotional support. Through this nontraditional social outreach program, homebound seniors engage with other homebound seniors and volunteers and maintain a connection to the community.



The majority of services provided by Friendly Connections are delivered via telephone. This includes individual telephone reassurance and friendly visiting, group telephone participation in recreational and educational activities, and group activities such as games, discussion of current events, or support groups.

Population Served

Although the program is designed for adults 60 and older, Friendly Connections is open to residents of all ages in areas of Fairfield County who are homebound and want additional social interaction and a lifeline to the community.

Currently the participants range in age from 46 to 97. They are homebound for physical or mental health reasons, temporarily or permanently. Some live alone; some live with families who aren't home during the day. Others have no family or friends nearby and want to socialize. The program currently has more than 100 volunteers and about 150 clients.

Program Components

Socialization is vital to health and well being, but it is difficult for homebound older adults to access social activities and community services. Friendly Connections removes most access barriers by offering socialization opportunities right in the home.

The program has three components of which participants can choose just one or all three: friendly calling, friendly visiting, and group telephone classes and discussions

Many older adults begin with a friendly phone call once a week, but as they become more comfortable with socialization and learn more about the program, they get involved in a group class or recreational activity.

The friendly caller and friendly visitor programs match trained volunteers with a program participant for social contact, friendship, and emotional support.

It's the group telephone classes and discussions that are the most unique. Family

Centers invested in reverse teleconference technology to make it simple for older adults to participate. They don't have to call in or remember passwords or access codes. Instead, they sign up in advance for the groups they want to participate in and the program calls them. As many as 24 people can be on the line at once.

A variety of groups and classes are offered every week day from 10 a.m.-6 p.m. Class offerings are based on the participants' suggestions and on topics of interest to the age group. In fact, one group that meets telephonically each month provides an opportunity for participants to offer feedback and suggestions to the Friendly Connections director. If, for instance, participants express an interest in nutritional information, the director will research information and work with the Family Centers volunteer manager to recruit a community member to facilitate a weekly or monthly nutrition discussion group.

Based on interest, activities might be offered several times a week, weekly, or monthly—bingo and exercise classes are especially popular. Group conference calls might cover current events, trivia, travel, and history. Eldercare attorneys might discuss reverse mortgages or advance directives. Physicians and other healthcare professionals frequently provide a program and often follow up several months later with another class to check progress and answer questions. Support groups are directed to caregivers, vision loss, Alzheimer's disease, and other targeted concerns.

Friendly Connections participants receive a monthly newsletter with a calendar of all telephonic events. They call the Family Centers office in advance to sign up for the groups they're interested in but are not obligated to participate if their plans change. Client class enrollment is inputted into a software system. When the program is set to begin, participants automatically receive a phone call with an automated message welcoming them to the program. Within several minutes the facilitator and all participants are connected into the group via reverse conference call.

Two annual events include clients, volunteers, and community partners. These events offer program participants a chance to get out of the house, to meet the people who they speak to over the phone, and to socialize with others.

Outcomes

Friendly Connections conducts two different surveys twice a year for clients and volunteers. The surveys gather information about level of involvement and program impact. This tool helps guide program content and increase quality of service. Through the surveys and anecdotally, program participants often report a more positive mood, higher level of satisfaction, and improved health as a result of the socialization and greater access to health information. The surveys also serve as a method of assessment and follow-up evaluation.

Friendly Connections requires all incoming clients/program participants to complete an intake form which provides the staff with information about the new individual. The intake collects various information, but also asks questions that may be followed up after six months to one year of participation in the program. The goal is to assess the incoming situation and have a positive change reported after participation. Research supports and demonstrates the positive effects of a social network in physical and mental health.

Why It Works

As adults age, physical and psychological barriers increasingly prevent them from socializing and interacting with the community. Friendly Connections reaches directly into the homes of isolated older adults, providing friendly callers and visitors and a wealth of group activities.

Clients decide what services they want, what topics they're interested in, and when they want to participate. Program planning is based on close feedback about clients' needs and interests.

Funding

The software and technology for the reverse conference calling is expensive;

Family Centers invested about \$15,000 up front. Additional costs include staff support, volunteer recruitment, training and supervision, program outreach, and support around the two annual events for clients, volunteers, and community partners. Friendly Connections relies primarily on volunteer support for services provided. There is no charge to Friendly Connections participants.

Currently, the program is funded entirely through private fundraising.

Collaborations

Friendly Connections works closely with other organizations that serve the same population and community to reach clients, provide resources, recruit volunteers, and gain new funding sources. The program collaborates with local governments, senior centers, hospitals, senior care facilities, libraries, doctor's offices, media sources, and many other community organizations.

Marketing Efforts

Because they are isolated in their homes, the target population is very difficult to reach. Friendly Connections works hard to educate the community about this unique program and develop referral sources. The agency created a program brochure and the monthly Friendly Connections newsletter and calendar is distributed to libraries, senior centers, physicians offices, and other community partners.

Family Centers maintains close relationships with the media and offers local broadcast and print media topical articles and information on issues impacting older adults. This enhances the status of Family Centers as an expert in older adult issues

Once established, the program has grown by word of mouth as one client or family member recruits another participant

Lessons Learned

Family Centers provides the following lessons related to its Friendly Connections program:

- Look for creative ways to access this hard-to-reach population.

- Don't have preconceived notions about older adults. A 60 year old might be in poor physical or mental health and need in-home services, while an 85 year old might be healthy, still driving, and an active volunteer.
- One obstacle has been retaining a volunteer core and instilling loyalty among them. This is especially true of administrative volunteers, who are asked to donate four hours each week in support of the program director. Creating a separate, comfortable office for administrative volunteers helped raise the level of engagement and commitment.
- The teleconferencing technology sometimes creates problems. For some seniors, it is too complicated and they become frustrated. And, as with any technology, glitches in the system do occur occasionally. In addition, program volunteers help the older adult participants become more proficient with this technology.
- Keep the programs well attended and successful by creating interesting groups and classes, offering diversity, and responding to the expressed needs of program participants.

Guidelines for Replication

While the friendly phone calls and visiting are readily applicable for other organizations, the group activities via teleconferencing component is a bit more difficult. Gaining advice from the organizations that are using this type of technology, such as Family Centers, is advised. Keeping the technology as simple as possible so older adults can easily access the system is very important.

A secure funding source is key to program replication because the technology and staff support is expensive. Family Centers suggests developing a good understanding of your donor community and knowing how to identify potential donors and sell the program to them. In addition, maintain close media relationships to keep the program successes and its funding needs in the public eye.

Traditional methods of program promotion may not reach these homebound adults, although their family and friends might well hear about the program and refer them to it. Promote the program among the individuals and groups the prospective clients and their family members are most likely to interact with, such as healthcare providers, senior centers, and faith-based organizations.

Quick facts about Family Centers:

Family Centers
40 Arch Street
Greenwich, CT 06830
familycenters.org

Friendly Connections program

contact: Rebecca Lippel, Manager,
Friendly Connections, 203-517-1024,
rlippel@familycenters.org

Family Centers is a private, nonprofit organization offering education and human services to children, adults, and families living in Lower Fairfield County.



More than
1,000
professionals

and trained volunteers work together to provide a wide range of responsive, innovative programs. Family Centers realizes its mission through five Centers of Excellence, which offer programs spanning the continuum of life. They include Bright Beginnings, Families in Crisis, Fostering Independence, Healthy Aging, and Workplace Resources.

It can be challenging to identify, recruit, train, and retain loyal volunteers. Volunteer training not only prepares volunteers for their role, but also increases their excitement and loyalty to the program. Volunteer trainings should include tips for working with homebound older adults, important resources in the community and their contact information, and detailed information about the program and agency.

Maintain close ongoing communication with volunteers through training, meetings, events, and group discussion to increase skills and a sense of connection.

Friendly Connections and a unique group teleconferencing program of activities keeps the homebound elderly population active and engaged in their community. ■

Family Lifeline, Richmond, Virginia ElderFriends

During his first semester of medical school, John's love of geriatrics brought him to ElderFriends and a new friendship with Ms. S.

John found her to have "a lot of personality and a straightforward manner." When the friendship started John could not know that Ms. S would in turn help mold him into a better person and physician.

In the beginning, John quietly listened as Ms. S complained about her doctors. Convinced they did not know what was wrong with her, she said, "I swear those young doctors down there are experimenting on me." He decided not to share his future career goals with her until a few months into the friendship. John said, "In my naive mind, I believed that after I told her this she would hold back her complaints about my chosen career path. However, I was severely mistaken. Then one day I understood."

John realized Ms. S barely had a fifth grade education and could not read. "No wonder she was so upset at the health care system, she honestly had no idea what was wrong with her." Procedures were explained and handouts given to her, but she was too embarrassed to admit that she could not read or comprehend her diagnosis. John says, "I will never forget the lessons that I learned from her on that day. You have to be able to know your patients and their backgrounds to be a good doctor."

After three years of friendship and weekly visits, Ms. S was hospitalized with a terminal disease at John's hospital, allowing him the opportunity to visit her each morning. Every day she said the same thing,



"Where's my Jello? I am getting out of this hospital even if it kills me."

John continues to volunteer with ElderFriends today.

Program Description

Created in 2005, ElderFriends is a volunteer-based friendly visitation program of Family Lifeline to promote healthy aging and help older adults remain independent in their own homes. The program builds human capital by promoting health, independence, and self-advocacy for older adults living alone in the community.

Its goals are to reduce isolation and loneliness, provide social and emotional support, and improve knowledge about community resources. ElderFriends fosters caring friendships between generations of youths, adults, and older adults. The program won a Commonwealth Council on Aging Best Practices Award in 2007.

Population Served

ElderFriends serves adults age 60 and older who live independently, self-report feeling lonely or socially isolated, and would enjoy having a friendly visitor call on them.

**Family
Lifeline**


ALLIANCE
for Children & Families

Family Lifeline serves a wide geographic area, including a mid-sized city, its suburbs, and outlying rural areas. ElderFriends clients currently range in age from 60 to 102. They have varying degrees of health, mobility, disability, social access, and support networks. Program clients are 48 percent Caucasian and 47 percent African American, closely reflecting the diverse population of the area. Almost 85 percent are female. Although there is no income criteria for program participation, 82 percent of elders report having low or very low income.

Program Components

ElderFriends is modeled after the friendly visitation programs nationwide, first launched in Seattle. The program attains both volunteers and clients through its strong network of community partnerships and collaborations. The Capital Area Agency on Aging, business, civic, and faith-based groups, healthcare groups, and government and other nonprofit agencies are a rich source of referrals. Many volunteers are recruited through existing volunteer recruiting tools and free web portals such as volunteermatch.org.

Volunteers complete an application and a matching preference form. References are obtained and a complete background check performed on all volunteer applicants. The mandatory volunteer training includes topics such as the agency mission and history, information about the aging process, communication skills, area resources, emergency procedures, advocacy skills, how to track hours, and rules and tips for visiting.

Volunteers agree to a one-year commitment of four visits per month and weekly phone calls to their elder friend. There are no specific duties and only a few areas are off limits such as providing healthcare duties, decision-making, and getting involved with financial matters. The agency gives the volunteer and the older adult the flexibility to navigate their friendship and work out themselves how they'd like to spend their time together. Some just sit and talk, play cards, or watch a movie. Some volunteers take their elder friend for lunch or grocery shopping, or even take them home for

dinner to meet the family. Volunteers also are encouraged to send written correspondence and cards.

The agency conducts an in-home assessment of each older adult participant, based on the state of Virginia's uniform assessment instrument. The program coordinator tailored the form to capture more information about the elder's personality, capabilities, interests, and preferences so the best match can be achieved.

After the match is made, there is a trial period of about one month. Program staff stay in touch with both the elder and the volunteer to make sure the match is working out.

Volunteers submit a quarterly report with the number of hours logged, number of phone calls and visits made, direct services performed (such as running an errand or driving the elder to the store), and any concerns or issues that the agency should know about.

Through its experience with the program, Family Lifeline learned that many volunteers do not want a weekly, long-term commitment. So the agency recently implemented a buddy program, with friends, family, or co-workers volunteering as a group for one elder. The client still receives at least four visits and phone calls a month, but several volunteers are providing that companionship.

Outcomes

ElderFriends measures its success by tracking the number of hours volunteers devote to visiting elders and supporting the program, the number of volunteer-elder matches, and the estimated monetary value of the volunteers' time.

In addition, ElderFriends conducts two surveys: one with participating elders and another with the volunteers. These surveys are administered by mail. Follow-up phone calls are made to those who do not respond. All mail surveys are accompanied by a pre-stamped, pre-addressed return envelope and a brief cover letter from the program director.

A summary of FY09 results includes:

- Since joining forces with Family Lifeline, the ElderFriends' capacity has increased threefold. Two years ago, ElderFriends supported 30 volunteer-elder matches, today, there are 100 matches.
- Volunteers committed more than 7,000 hours of friendly visiting, companionship, advocacy, and program support. This was a 62 percent increase from FY08.
- Through investing in the power of human capital and effectively utilizing partnerships, the estimated value of volunteer time and in-kind support provided to ElderFriends totaled nearly \$157,000. This is a 69 percent increase from the last fiscal year that was \$92,000.
- The in-home services and program support received high marks from the elders. Ninety percent reported feeling less lonely; 94 percent said their volunteer gives them emotional support when needed; and 100 percent were satisfied with their experience.

Volunteers also had positive feedback with more than 90 percent reporting their experience was very rewarding.

Why It Works

Family Lifeline believes that the success of ElderFriends is based on its underlying principle: Helping elders maintain social connections reduces the negative physical and emotional impact of isolation and loneliness. In addition, the program is based on a research-based, proven model replicated around the country.

Funding

ElderFriends is supported through Family Lifeline operational funds, through an Alliance for Children and Families New Age of Aging grant, and through other grants and community foundations. Individual and business donations also help support the program.

Salary for the full-time program director is the greatest program expense. A half-time volunteer coordinator assists the director. Family Lifeline is working to reduce overhead by accessing in-kind donations, free volunteer portals, and using electronic communication with volunteers instead of printed materials. The program measures return on investment as the value of volunteer time plus the value of in-kind donations, minus expenses. Using this formula, the return on every dollar invested is currently \$1.25.

Collaborations

Family Lifeline tries not to re-invent the wheel but to be part of a community team that serves the older adult population. The ElderFriends program continually looks for unique partnerships that can assist with volunteer and elder recruitment or provide services to clients.

The Capital Area Agency on Aging is a strong partner, referring 25 percent of the current elders in ElderFriends. Other agencies including housing coalitions, senior advocates, Meals on Wheels, senior housing facilities, and home care agencies provide referrals. AmeriCorps volunteers have provided office assistance and elder support, and a division of the county Department of Mental Health/ Mental Retardation provides grocery shopping services for clients of ElderFriends.

The ElderFriends program also strives to be the volunteer resource within its own agency. For example, ElderFriends recruited volunteers to stuff donor envelopes, redesign the agency website, and produce an agency video. The program also partners with Family Lifeline's personal care program to host events promoting healthy aging and participates in community outreach and advocacy.

As the country experiences a rapidly increasing population of older adults, new partnerships are forming nationwide to address this challenge. The ElderFriends program and Family Lifeline continually look for new ways to be engaged in the dialogue and have a voice in promoting healthy aging and building strong communities.

Marketing Efforts

ElderFriends focuses on developing community networks, going to the heart of the volunteer and elder referrals. The program is closely linked to many businesses, organizations, and state government partners. For example, ElderFriends has so many volunteers who work for the City of Richmond that the program director can ask the city special needs advocate for help finding volunteers from a specific zip code.

Large corporations often invite program staff to provide volunteer information in the lunchroom. The agency continually looks for new ways to connect with volunteers, such as posting opportunities on employee or advocate websites like Verizon or AARP.

The program is promoted on the Family Lifeline website, in its publications, and through program presentations. A 2009 article in the *Chesterfield Observer* publication yielded nine new volunteers.

Lessons Learned

Family Lifeline has discovered that collaboration and a strong community referral network are vital to the success of ElderFriends.

They also realized the commitment of one visit a week for one year is too much for many volunteers. The newly implemented buddy system enables volunteers to partner with each other on behalf of one elder. The elder benefits by engaging with more people, while the volunteers don't find the time commitment so daunting by trading off weeks.

Another challenge is the need for services beyond the ElderFriends criteria. The program focus is to help adults age 60 and older remain living independently in the community. Referrals sometimes come in for younger homebound persons with disabilities or for an elder living in a long term care facility. ElderFriends currently is working to expand the program to include friendly visiting with a lonely elder who lives with a family member who works during the day.

Quick facts about Family Lifeline:

Family Lifeline
2325 West Broad Street
Richmond, VA 23220
family-lifeline.org

ElderFriends program contact: Colleen Wilhelm, Program Director, 804-249-5415, cwillhelm@familylifeline.org

Family Lifeline has been helping families succeed since 1877 as a private, nonprofit human service agency. Family Lifeline has served as a vital "lifeline" for families, providing them with the tools and resources needed to create a better future for themselves and their community. Throughout its long, proud history, Family Lifeline has celebrated its mission, while simultaneously focusing on current community needs, assuring that, as an agency, it remains relevant. The agency's unique approach to partnerships and fundamental service philosophy are



The logo for Family Lifeline features the words "Family" and "Lifeline" stacked vertically in a blue, sans-serif font. A green, wavy line underlines the word "Lifeline".

at the heart of its longevity and success. While much has changed over the years—the people they serve, how their programs operate, and even where they provide services—the Family Lifeline mission and vision remain constant.

Mission: To provide families with the tools and resources needed to create a better future for themselves and their community. Today, we provide vital support and services at critical stress points occurring throughout the lifespan—from the birth of a baby to caring for older adults.

Vision: Strong families for a strong community.

Both the elder and volunteer population are continually in flux. Volunteers sometimes have to end their commitment early because of a move or illness. Elders move to long term care facilities or pass away. Thus there are occasionally elders waiting for a volunteer match or volunteers waiting for an elder friend.

Volunteer recruitment and retention is an ongoing effort. ElderFriends continually seeks new ways to recruit volunteers while celebrating its current volunteer corps at every opportunity.

Volunteers are more closely tied into the program by providing feedback and serving on committees that impact the program. ElderFriends tries to make volunteering easy. Volunteers and elders create their own program and timeframe for activities. Reporting of volunteer hours is simplified through online reporting.

Guidelines for Replication

ElderFriends is a model of the successful friendly visitation program first launched in Seattle in 1996. This proven model has

outlines for replication that can be adapted by other organizations. Family Lifeline has shared program replication materials with several government departments and nonprofit organizations.

The agency welcomes the opportunity to offer suggestions and resources with other Alliance members that want to create a similar program. Family Lifeline feels the key to success with this type of program is establishing community partnerships that build volunteer and elder referrals and provide a network of elder resources.

It does indeed "take a village" to age, age well, and age in place. By providing socialization and friendship and by forming strong community partnerships, ElderFriends creates a network of community support to help elders remain as independent as possible in the community. ■

Family Services of Montgomery County, Eagleville, Pennsylvania

Project HEARTH

Mrs. J, an 84-year-old woman, was referred to Project HEARTH by her daughter who was worried that her mother was not coping well. The daughter thought her mother's emotional outlook worsened soon after the death of Mrs. J's husband.

When the Project HEARTH geriatric outreach counselor met with Mrs. J for an in-home assessment interview, the counselor was able to help Mrs. J realize that she was mildly depressed and was still grieving for her husband. Mrs. J was helped to see how her major role in her life and her identity as a wife was "taken from her" through her husband's death and she did not have anything yet to replace it.

Over the next eight months, Project HEARTH's geriatric counselor assisted Mrs. J to mourn this loss and to face some of the other losses in her life as well. Over time, Mrs. J's depression lessened as she realized that she could still engage in some of the activities that were so important to her prior to the death of her husband. Mrs. J began to attend some of her church functions and even agreed to visit the local senior center. Project HEARTH volunteers occasionally provide transportation for Mrs. J and the geriatric counselor also arranged for a group of HEARTH volunteers to do some yard work and maintenance at her home.

Program Description

Project HEARTH (Helping Elderly Adults Remain in Their Home) has been a service of Family Services of Montgomery County for 15 years. The program responds to



the unmet needs of frail homebound seniors through two components: in-home counseling provided by a geriatric counselor and volunteer-provided support services.

Population Served

Project HEARTH serves homebound, low-income seniors, age 60 and older throughout Montgomery County. Typically older adults have been referred to the program as at risk for depression, anxiety, or confusion.

The majority of Montgomery County's residents live in suburban communities that are not too distant from Philadelphia. But the program also serves urban and rural seniors. More than 17 percent of the county population is age 62 and older. County demographics are 65 percent Caucasian and 28 percent African American. Counseling and volunteer services have been provided in Spanish, Gujarati, and Hindi.



Program Components

The mental health component includes:

- Outreach is made to isolated and hard-to-reach seniors. Potential clients are referred from an aging and adult services case manager, hospital social worker, clergy, social service agency, or family member.
- If the older adult is willing, a licensed social worker/geriatric outreach counselor conducts an in-home psycho-social assessment. This includes assessment instruments such as the Geriatric Depression Scale, Anxiety Scale, the Global Assessment of Functioning Scale (GAF), Life Satisfaction Scale, and an Activities of Daily Living Scale to identify issues of depression, anxiety, life satisfaction, and general functioning. In addition to serving as a valuable diagnostic tool to assist in determining appropriate interventions and referrals, these instruments provide baseline information to compare and measure progress.
- If the senior is willing, in-home mental health counseling is provided as needed. Although some cases are long-term, the typical program participant receives 10-12 in-home counseling sessions.
- Because of the importance of the clients' relationship with their physician, the geriatric counselor may request permission to contact the physician as the need arises. Referrals to a client's primary care physician are utilized to obtain psychiatric evaluations and medications.
- Clients are provided with information, referrals, and linkage with medical care and other services as appropriate.
- The program includes follow-up, feedback, and client satisfaction measures.

The volunteer-provided support services component includes:

- Volunteer coordinators recruit volunteers to provide various services to seniors. Every volunteer undergoes a background check and orientation.
- Upon receiving a client referral, the volunteer coordinator links the client with a community volunteer. Services include transportation, friendly visiting, minor home/safety repairs, errand escorts, grocery shopping, yard work, and basic home maintenance.
- Many volunteers offer assistance on a long-term basis with specific hours each week. Volunteers from businesses, service clubs, and youth groups provide a morning- or day-of service as a group project. Volunteers interested in friendly visiting/ telephone reassurance are matched with specific clients.
- The volunteer coordinator provides follow-up, feedback, and secures client and volunteer satisfaction information.

Outcomes

Over the last 15 years, Project HEARTH has helped more than 1,200 seniors and has recruited more than 250 volunteers to provide a variety of supportive services.

Frail, low-income older adults were helped by reducing their mental health symptoms and assisted with activities of daily living so they could remain independent in their own homes for as long as possible.

Since 1994, at least 75 percent of all elderly persons who were provided with in-home counseling services evidenced a decrease in depressive symptoms and an improvement or stability in their GAF level of functioning. Eighty percent self-report satisfaction and improvement in functioning. At least 85 percent of all elderly clients report that volunteer-provided services are helpful in maintaining their independence.

The community has come to value the importance of Project HEARTH, demonstrated by the growing media attention, increase in volunteers, and the increase in foundation support.

Why It Works

Older adults frequently do not seek counseling because of lack of information, denial of problems, stigma, failure of medical and social service professionals to identify mental health symptoms, and lack of transportation. Project HEARTH overcomes these challenges by delivering counseling services directly in the client's home. The program also engages in active community outreach, particularly to primary care providers. Older adults are more likely to follow through when their health care provider recommends the program.

The volunteer repair services provide simple repairs or safety installations that can prevent falls and injuries that might lead to hospitalization and nursing home placement. This part of Project HEARTH also includes transportation, friendly visiting, assistance with chores and additional volunteer support services that help older adults to remain living independently.

Funding

The program operates on a patchwork of grants, insurance reimbursement, fees-for-service, and donations. A grant from the Pew Charitable Trust funds services in two areas of Montgomery County. This enables the program to leverage funds from three other foundations. The county Department of Aging and Adult Services provides funding, and some of Family Services of Montgomery County's United Way funding is allocated to Project HEARTH. Foundation and government grants do not cover administrative overhead and other costs.

Project HEARTH's licensed clinical geriatric outreach counselor recently attained approval as a Medicare reimbursable

provider. For clients with Medicare B or other insurance coverage, the agency may be reimbursed up to \$70 for an in-home counseling session. The agency also employs several fee-for-service licensed social workers and counselors who do not yet meet the higher supervised experience level required by Medicare. The sliding fee scale is based on self-declared income. Most Project HEARTH clients pay \$5 to \$15 per session.

Volunteer services are not eligible for insurance reimbursement. Clients pay for materials for handyman services, but not for labor. If they are able, all clients are encouraged to make a donation.

Only about one percent to three percent of program services are reimbursed by insurance or covered by client donations. Despite the limited and unstable funding, the program has never had to reduce services.

Collaborations

Project HEARTH works closely with the county Department of Aging and Adult Services. In addition, visiting nurses, social workers, hospitals, adult day centers, Meals on Wheels, social service agencies, churches, service clubs, and local businesses and corporations play a vital support role by making referrals and providing volunteers. Staff from Family Services of Montgomery County programs also make and receive Project HEARTH referrals. Project HEARTH also trains staff of other agencies to improve their competence in working with seniors and to increase referrals made to the program.

Marketing Efforts

The Project HEARTH geriatric counselor visits doctors' offices and works closely with other agencies and organizations serving older adult populations. The counselor also participates in numerous community collaborations and coalitions to promote the program. Outreach activities to recruit clients and volunteers have been made to African American churches, the Latino community, Korean community organizations, and the Asian Indian community.

Lessons Learned

Over 15 years, Family Services of Montgomery County has learned valuable lessons related to Project HEARTH:

- Counseling services can be segmented, targeted, marketed to, and funded for a specific vulnerable population.
- Vulnerable seniors can and do benefit from counseling, albeit usually in a slower and less dramatic way than younger populations.
- One-on-one, in-home mental health counseling is expensive to provide. Marketing the program, recruiting and coordinating volunteers, and soliciting funding is ongoing and takes as much staff time as actually providing the service. Program funding is consistently insufficient and tenuous.
- Medicare provides limited reimbursement for some clients, but requires clinicians at the highest licensure level. It has been an ongoing struggle to recruit and retain staff at that level and also to obtain

licensed clinical "fee for service" staff willing to work with an elderly population and provide in-home services over a large geographic area.

- Project HEARTH is well received by the community and offers many public relations opportunities for the agency.

Guidelines for Replication

Family Services of Montgomery County has no formal replication guidelines but welcomes the opportunity to offer guidance to other agencies considering such a program. Agencies could consider offering just one of the two components of Project HEARTH. Guidelines would include:

- Build awareness and a referral network among those individuals and groups that older adults are most likely to interact with and trust.
- Engage a corps of volunteers who enjoy helping vulnerable and at-risk populations. Don't overlook active older adults, a rich volunteer resource that can provide a peer-to-peer connection.

Quick facts about Family Services of Montgomery County:

Family Services of Montgomery County
3125 Ridge Pike
Eagleville, PA 19403
fsmontco.org

Project HEARTH contact: Larry Fiebert,
Associate Executive Director, 610-630-2111,
lfiebert@fsmontco.org

Family Services of Montgomery County is a private, nonprofit, social service agency that is dedicated to enhancing the quality of life of individuals, families, and the community by providing an innovative and comprehensive range of human services. Family Services cares for people of all ages, races, and walks-of-life. Each year it helps more than 16,000 people in Montgomery County, Pennsylvania, through programs from three office locations.



Vision: We envision a strong, caring community of individuals and families meeting the challenges and opportunities of life.

Mission: Family Services is dedicated to enhancing the quality of life for individuals, families and the community by providing an innovative and comprehensive range of human services.

- If necessary, provide additional training in geriatric issues for the licensed counselors who will be providing in-home counseling.
- Enlist agency board members and current volunteers as advocates and spokespeople for the program. They can also be an important donor resource.
- Begin providing services in a limited geographic area. Build on your success and experience as additional funding and volunteers become available.

A growing number of older adults are depressed, anxious, isolated, and struggling with health issues and reduced capabilities. They are far more likely to become ill, incapacitated, and prematurely institutionalized. In-home counseling and supportive assistance like that offered by Project Hearth can successfully help seniors remain independent in their homes. ■

Family Services of Westchester, Port Chester, New York

My Second Home/JEWEL

In the early morning hours on a cold winter day, Rose and Sophia are seated together. Rose, the older adult, is modeling the behavior she hopes 4-year-old Sophia will follow.

Although Rose, a diabetic, is not particularly hungry, she should have a nutritious breakfast. Sophia is definitely not interested in eating. As Rose continues to eat her oatmeal, Sophia starts to eat breakfast as well. Mission accomplished! Rose's loving eyes remain on Sophia, engaging her in conversation and steadying Sophia's chair. They are there for each other and have helped one another; neither one would have eaten breakfast without the other present. "Grandma" Rose lives alone and Sophia's grandparents live out of state. This breakfast scene does not occur in Rose or Sophia's home, but in a dining room at My Second Home, an intergenerational adult day program of Family Services of Westchester.

Program Description

My Second Home, a program of Family Services of Westchester, is a social model adult day program that provides older adults the opportunity to age in place. By providing a safe, home-like environment during the day, the program strengthens the family system of caregivers who wish to keep loved ones at home and engaged in the community. My Second Home helps up to 90 older adults continue to find meaning and dignity in their daily lives through



wellness activities, personal care, a warm and stimulating environment, nutritious meals, and transportation.

My Second Home, while rich in programming, environment, nutritional choices, and high staff-to-participant ratios, operates at one third of the cost of in-home care and one fifth of the cost of nursing home care.

In 1998, My Second Home began joint intergenerational programming with Mount Kisco Child Care Center, calling the program Joining Elders with Early Learners (JEWEL). Children from the child care site visited older adults weekly at the adult day program. When the child care center built a new facility in 2002, the building was built to accommodate the My Second Home program as a tenant and promote increased intergenerational interaction. It is among a very few shared site intergenerational programs in the nation.

The JEWEL program brings seniors and children together on a daily basis to share activities and life experiences. It gives the senior participants an increased sense of



well being and greater satisfaction with life, while children experience the sense of security and self worth that a caring relationship with a senior can provide. In 2008, the program gained national recognition as a National Best Practices Award Winner by The MetLife Foundation and Generations United.

Population Served

My Second Home serves older adults (69 percent are female) with cognitive impairments from mild memory loss to all forms of dementia, including Alzheimer's disease. For more than 60 percent of attendees of My Second Home, the daily fees are covered through private pay, while the rest of the attendees pay a reduced fee.

In 2009, the youngest participant was 51 years old and the oldest 98. My Second Home can accommodate 50 adults; the daily census is about 45 participants. Ninety adults are currently enrolled, but attendance varies from two days a week to six days a week. The child care center serves 150 children daily on a full- or part-time basis.

My Second Home is located in an ethnically diverse suburb near New York City. The senior population, currently about 167,000, is surging as baby boomers age and move back to the area to be with their families. By 2010, one out of every four residents in Westchester County will be age 65 or older, a trend that is outpacing other localities around the nation.

Program Components

Daily interactions between the children and older adults occur through structured activities and informal interactions of the JEWEL program, all designed to build relationships between older adults and children. Activities include reading, arts and crafts projects, exercise and recreation, baking, picnics, gardening, music, or simply chatting. Two structured activities each day pair four older adults and four children. These groups meet for two months and then a new rotation of participants begins. All interactions and activities are on a voluntary basis, yet older adults rarely skip an intergenerational activity. Both populations look forward to seeing one

another. The children even begin to call the older adults by their first names, such as Grandma Rose or Grandpa Julian.

A JEWEL intergenerational coordinator position is funded equally between Family Services of Westchester/My Second Home and Mount Kisco Child Care Center. The coordinator reports to both the My Second Home program coordinator and the Mount Kisco Child Care Center program director.

The JEWEL intergenerational coordinator works with staff from My Second Home and Mount Kisco Child Care Center to develop 50 to 60 joint activities each month that are developmentally appropriate and meaningful to both generations. All JEWEL activities are supervised by staff from both organizations who understand that the interaction is more important than the activity itself or the finished product. Both agencies recruit staff with a commitment to working with young children and older adults. The staff is cross trained to develop their understanding of the diverse needs of each population.

In addition to the friendships that develop between older adults and children, co-located adult day care and child care centers maximize funds and other resources. My Second Home and Mount Kisco Child Care Center share the facility expenses based on each organization's square footage. The JEWEL intergenerational programming expenses are shared equally by each organization.

The two organizations work together closely to coordinate programming and resolve any challenges. My Second Home has an advisory group that assists the staff in JEWEL fundraising and development, particularly to provide scholarships that support diversity. The two organizations also share volunteers. In fact, the joint programming has opened the door to new volunteers that might not have been attracted to either program individually.

Outcomes

Both qualitative and quantitative evaluations of the JEWEL intergenerational program document its impact. An annual

Quick facts about Family Services of Westchester:

Family Services of Westchester
One Gateway Plaza
Port Chester, NY 10573
fsw.org

My Second Home/JEWEL Program

contact: Rina Bellamy, Director, My Second Home, 914-241-0771, rbellamy@fsw.org

Family Services of Westchester is a private, nonprofit, non-sectarian agency located in Westchester County, New York. Since 1954 Family Services of Westchester (FSW) has been dedicated to strengthening and supporting families and individuals at every stage of the life cycle with a broad range of social and mental health services. While the world has changed in many ways over the last five decades, FSW has remained true to its mission, keeping families—and



the support they need—foremost. Key program areas are Family Mental Health Services; Adoption & Children's Services; Head Start and Early Head Start; Senior Services; Home Health Care; Big Brothers-Big Sisters; AmeriCorps; Therapeutic Foster Care for Youth; and a spectrum of services for families living with HIV/AIDS.

Mission: Family Services of Westchester is dedicated to providing a broad range of social and mental health services that strengthen and support families, children and individuals at every stage of the life cycle.

satisfaction survey is sent to caregivers and program participants. With assistance from Fordham University's Ravazzin Center on Aging, the program created more sophisticated evaluation tools to evaluate the success of intergenerational programming. (The Ravazzin Center on Aging study is available online at fordham.edu/images/academics/social_service/jewel%20evaluation.pdf.)

Outcomes of this evaluation included:

- Older adults experienced increased energy and happiness as a result of their interaction with children, while the children learned the importance of sharing.
- Using focus groups with each participant group, it was determined that overall participants felt a sense of joy and a strong family environment at the center.
- Intergenerational activities helped build relationships and developed respect and admiration for older adults that carried over outside the program.
- The children's view of older adults was more positive as compared with preschoolers not involved with programming with elders.

My Second Home also has anecdotal reports from caregivers and staff that older adults in the JEWEL program show improvements in cognitive functioning, socialization, and expressiveness. More than 90 percent of caregivers noted a positive change in their older adult family member or friend after attending the program. They reported an increase in self esteem and self worth among the older adults who participated in the intergenerational program.

Why It Works

Margaret Mead said, "Everyone needs to have access both to grandparents and grandchildren in order to be a full human being." Both My Second Home and Mount Kisco Child Care Center passionately share that philosophy. Daily interaction between the generations through the JEWEL program helps

children feel loved and nurtured and gives older adults a sense of value and self worth.

Another key to success is the dedicated JEWEL intergenerational coordinator who oversees the program and coordinates activities.

Funding

The joint JEWEL intergenerational program is funded through private pay and state funds to enrich program activities.

After land for a new child care facility was donated in 2002, Mount Kisco Child Care Center took the lead in the capital campaign and raised the money to build the facility. Family Services of Westchester had mutual friends and beneficiaries that helped generate funding for the project.

Because Medicare and Medicaid do not provide reimbursement, My Second Home/JEWEL is largely limited to families that can afford self-payment. About 40 percent of program participants are charged a reduced fee that is supported by scholarships and other funding. Although child care programs obtain reimbursement for low income families, there is no equal source of funding for low income older adults. A My Second Home advisory board of 25 members organizes special events and specific fundraising campaigns in support of scholarship dollars.

The JEWEL program's national recognition by Generations United in 2008, along with the intergenerational programming study completed with the assistance of Fordham University, provided the impetus to create a dialogue between My Second Home/JEWEL and New York legislators. These discussions raised awareness at the county, state, and federal level. Before the state budget shortfall, one state legislator strongly advocated for scholarships for adults in adult day care. The agency continues to advocate for changes in reimbursement policy.

Collaborations

Collaboration is the heart and soul of the program, enriching the adult day model through the intergenerational partnership with Mount Kisco Child Care Center. My

Second Home also partners with many other community organizations, including the Devereux Millwood Learning Center, a school for children on the autistic spectrum; Boys and Girls Clubs; area schools; and Westchester Arc, serving children and adults with developmental disabilities. My Second Home/JEWEL also collaborates with Fordham University's Ravazzin Center on Aging and other organizations to conduct research.

Marketing Efforts

My Second Home/JEWEL is well received by the media. Coverage greatly increased with the opening of the facility that houses both the adult and child day care center. This garnered an article in the *Wall Street Journal*, the *Los Angeles Times*, and several articles in the *New York Times*.

Family Services of Westchester has made a concerted effort to promote the program after receiving national recognition for the Generations United award in 2008. The evaluation of intergenerational programming was also a springboard to generate awareness and support. Program staff realized that having a university's name attached to the research immediately gave it credibility.

My Second Home/JEWEL leveraged this recognition with strong outreach to county, state, and federal legislators. They invited legislators and community leaders to a breakfast to discuss the research and the benefits of intergenerational programming. The program continues to invite these political and community leaders to events and keep them informed about the program and issues related to this population.

Family Services of Westchester has an intergenerational coordinator who promotes the My Second Home/JEWEL program. Staff members have conducted workshops on the JEWEL program and it is promoted through the agency's website and publications.

As public and private programs are increasingly addressing the needs of the aging population, new opportunities are arising for collaboration with universities,

private organizations, and government programs on aging. My Second Home and Mount Kisco Child Care Center are working together to raise awareness among child care professionals about the benefits of intergenerational interaction.

Lessons Learned

Through 10 years of experience in developing this model, Family Services of Westchester has overcome many obstacles and learned many lessons. These include facilities planning, recruiting staff members who are passionate about both populations, training staff across areas of specialization, and making intergenerational programming both meaningful and impactful. These challenges were overcome through careful research of what has worked and what has not worked in other parts of the country, a commitment on the part of both agencies to work closely together and to support an intergenerational coordinator position, and a joint intergenerational budget.

Start-up funding and funding to sustain the program is an ongoing challenge. It is crucial to become politically active and share information about care for the aging with policy and lawmakers, and to advocate on behalf of these families with like-minded organizations.

Family Services of Westchester learned that there is a high demand for its adult day program model that provides life-enhancing activities and the potential to remain within the family unit in the community. The benefits of the program surpass even the highest expectations. However, the financial viability is still a problem for families due to limited insurance reimbursement.

My Second Home is one of Family Services of Westchester's 50 programs. Mount Kisco Child Care Center is a small entity with just one program: early childhood education. The organizations are very different in terms of structure, staffing, and funding. They jointly oversee the JEWEL program, which creates challenges. Family Services of Westchester recommends to other agencies just beginning an intergenerational program that only one

agency should oversee the program. However, the two organizations have made the program work through an equal commitment and open, honest communication.

Guidelines for Replication

With potential changes in health care modalities and the looming "graying of America," the intergenerational programming model is ripe for replication. Family Services of Westchester strongly believes that this model is the most cost effective and most desirable model for caring for older adults with depression, early stage Alzheimer's disease, and other forms of dementia. The program could be replicated within a single multifaceted agency, such as a family services agency with adult day care and Head Start programming, or as a collaboration with another agency (as in the My Second Home/JEWEL model).

Replication tips include:

- There must be a very strong working relationship between the partner organizations. Close, open communication is crucial.
- Hire program staff that are highly committed to both populations.
- Create programming that is meaningful for both generations.
- Educate the local philanthropic community about the need for quality programming jointly for both older adults and young children.
- Work with your intergenerational program partner to raise awareness and generate support. Be sure that potential donors and the general public understand that this intergenerational programming is a collaboration between two separate agencies.

Family Services of Westchester has not formally created guidelines for replication, but the agency has a wealth of information that it regularly shares with others through conferences and speaking engagements

throughout the country. Generations United has a how-to book with general guidelines.

Every child needs the love of an older adult or grandparent. Every older adult can benefit from the love of a child. Grounded in that belief, the JEWEL program creates a nurturing community under one roof for both older adults and children. ■

Jewish Family Services, Milwaukee, Wisconsin

Honor Your Aging Parents Wellness Program

Months after facilitating an Honor Your Aging Parents session, a Jewish Family Services staff member heard from one of the attendees. She was looking for advice on how to navigate the system in order to get some greatly-needed help on behalf of her mother-in-law. Even though the mother-in-law lived in another county, the staff member was able to help facilitate a connection between the local area aging services and the mother-in-law, easing the burden on the woman.

Program Description

Emphasizing a proactive approach to preventing crisis situations, Honor Your Aging Parents Wellness Program equips caregivers with the skill and knowledge to positively support the aging process of a family member. The program, which was launched by Jewish Family Services (JFS) in 2008, is unique in that it reaches out to employers, community groups, church groups, or similar venues to locate and educate caregivers.

Population Served

Current or potential caregivers are in their prime working years, juggling expectations of job, family, and an older parent.

Therefore Honor Your Aging Parents is directly targeted to people in the workforce age 35 to 60 who are caring for, or may soon be caring for, an older adult. Most of the program participants live within the Milwaukee metropolitan area and represent diverse ethnic, religious, and socioeconomic backgrounds.



Program Components

Goals of Honor Your Aging Parents include:

- Community outreach to expand agency awareness and services to new populations;
- Support of the aging process; and
- Enhanced wellness for older adults and their caregivers.

JFS markets the program to Milwaukee area businesses, offering to conduct the program on-site for interested employees, typically during the lunch hour. There is no fee to the employer or participants. In some companies, Honor Your Aging Parents is presented as part of the corporate wellness program.

The one-hour program is based on a PowerPoint presentation created by a JFS master's level social worker. It includes real-life situations encountered by caregivers of older adults and offers potential solutions. The program is informal, highly participatory, and flexible, responding to the immediate needs of the specific participants.



Caregivers come away with knowledge about the aging process, accident and injury prevention, health and wellness tips for both the older adult and the caregiver, communication techniques, crisis management skills, suggestions for dealing with the emotional and physical stresses of caregiving, and a list of available community resources. Depending on the specific needs of the audience, the group might discuss issues such as how to talk with your aging parent about difficult topics, maintaining boundaries, writing an advance directive, when to take away the car keys, or how to research assisted living facilities.

Program outreach also introduces JFS to new community and business groups that may not previously have been aware of the agency's extensive programs and services.

Outcomes

Because the agency typically has just one contact with program participants, it is unable to measure behavioral change as a result of the information provided. Surveys distributed at the presentation show an immediate satisfaction rate of 90 percent and higher. JFS currently is revising its program evaluation form to collect more meaningful feedback.

A program goal is to raise awareness about all JFS programs and services and therefore attract new clients to the agency. While several participants have followed up with JFS after attending the program, unless new agency clients self-identify that they heard about JFS as a direct result of the Honor Your Aging Parents outreach program, the agency is unable to ascertain accurate statistics.

Why It Works

This program is effective because it meets the target population in a location that is convenient—the workplace, community group meetings, and other similar venues. Employers support the program because it can potentially reduce lost productivity that occurs when employees are physically and emotionally exhausted from their caregiving duties.

Other success factors include the ability to adjust program content for each individual group, a focus on supporting caregivers, and addressing the community need to support the growing number of caregivers in a metropolitan area.

Funding

Fortunately, the program has little cost. The JFS social worker created the PowerPoint

presentation in about 30 hours. Just one staff person is needed to conduct the programs and contact businesses. The JFS Older Adult Services outreach coordinator also performs other outreach activities. This position is funded through the operations budget.

The Honor Your Aging Parents program is funded through an Alliance for Children and Families New Age of Aging grant. This grant was instrumental in planning the content and launching the program.

Collaborations

The JFS Older Adult Services department works closely with the Milwaukee County Department on Aging, other government and private human service programs, the healthcare community, and interfaith organizations.

Marketing Efforts

Initially, the program was marketed through personal contacts of the JFS Board of Directors. The program now is also promoted at professional networking groups, community presentations offered by the agency's Older Adult Services and Family Life Education departments, and on the JFS web site. A press release earned media attention, and an article ran in the Milwaukee County Department on Aging newsletter.

JFS is about to begin promoting the program through synagogues and churches. This current promotion strategy includes building relationships with organizations and businesses, and reinforcing the agency's role as a community resource for caregiving and older adult issues.

Lessons Learned

Over the course of more than one year, JFS has learned several lessons related to the Honor Your Aging Parents program:

- Mailings and cold calls to area businesses yielded little results. The agency turned to its board of directors for contacts. Directors provided contact information for their own work site and to other local businesses with which they had personal or professional relationships. These direct connections offered the best entry point.

Quick facts about Jewish Family Services:

Jewish Family Services
1300 North Jackson St.
Milwaukee, WI 53202
jfsmilw.org

Honor Your Aging Parents Wellness program contact: Gina Botshtein, Vice President, Older Adult Services, 414-390-5800, gbotshtein@jfsmilw.org

Since 1867, Jewish Family Services (JFS) has provided comprehensive social services for the Milwaukee area Jewish and general community. The mission of JFS is to provide supportive services that will strengthen families, children and individuals throughout the life cycle within the context of their unique needs and traditions. We are guided by our



Jewish values of compassion, kindness and righteousness. In support of this mission, JFS provides

a wide range of programs including family counseling and family education, older adult services including housing for income eligible elderly and disabled individuals, refugee resettlement and support services, exceptional needs services to individuals with chronic disabilities including those with serious mental illness and developmental disabilities, and volunteer services.

- Smaller organizations may be most receptive. The majority of larger companies have an employee assistance program that may already provide this type of information in some format.
- When the program is promoted to a prospective employer, the strongest selling points are statistics about lost workforce productivity and the program's potential to reduce emotional and physical distress among employees who are also caregivers.
- Many businesses plan employee educational and wellness programs far in advance. In addition, some want only entertaining, not informational, programs
- Concise sessions with specific topics have proven to be most valuable.

Guidelines for Replication

JFS has no formal replication guidelines but is willing to offer suggestions to other Alliance member agencies. In addition, the agency will share its PowerPoint presentation, program flyer, evaluation form, and resource materials.

Some of the basic tips for replicating the Honor Your Aging Parents program include:

- Use your existing contacts and natural constituents to promote the program.
- Develop a network of supportive services and other resources to link program participants to; this network can also be a source of referrals.
- Emphasize that this is a wellness program, offering caregivers of older adults the tools they need to better take care of their aging family members as well as themselves.
- Promote the program to employers on the basis of recovering lost productivity.

According to the Administration on Aging, by 2030 there will be about 71.5 million persons age 65 and older, more than twice the number as in 2000. As American older adults increase in numbers, so will the number of caregivers for these older adults. Honor Your Aging Parents helps improve wellness of older adults and caregivers, ease caregiver stress, and improve workplace productivity. ■



Personal and Family Counseling Services of Tuscarawas County, New Philadelphia, Ohio

Senior Outreach Program

Two community residents who benefited from the Senior Outreach Program said the Personal and Family Counseling Services social worker helped them overcome very difficult challenges.

An 81-year-old woman who was recently widowed met the social worker at the senior center and she gained assistance with a significant amount of paperwork, organization of bills and bill paying, numerous questions regarding the Veterans Assistance benefits and services available, even setting up an appointment with a driving instructor.

On a different occasion, another woman and her mother praised the social worker for assisting them in learning how to better care for a family member with Alzheimer's disease.

Program Description

Launched in 2008, the Senior Outreach Program is a collaboration between Personal and Family Counseling Services and the local senior center to offer social services for older adults. The Personal and Family Counseling Services geriatric social worker provides comprehensive intake and assessment, typically in the client's home after contact has been established at the senior center. This is the only program in the county that provides assessment of physical and psychosocial needs of older adults, links them with appropriate services, and collaborates with the client and/or family to develop a service plan. The goals are to improve quality of life and to help the older adult live independently or in the least restrictive community environment as possible.



Population Served

The Senior Outreach Program is targeted to county residents age 60 and older. In this rural community with a population of 90,000, the number of adults age 60 and older is expected to grow from 19 percent to 27 percent by 2020. The Appalachian culture permeates throughout the area, presenting a significant challenge in outreach and service delivery. This culture tends to include people who are close-knit, private, slow to accept outsiders, self-reliant, and reluctant to ask for assistance or talk about personal issues. Not only are some county residents uncomfortable sharing their feelings and experiences, there is a stigma about admitting to or being treated for mental health problems.

When the local senior center moved into a state-of-the-art building, it experienced a huge growth in membership, serving more than 300 older adults daily. Although the center wanted to be a one-stop-shop for older adults, the staff realized a crucial component was missing: social services. Many of the senior center members were



depressed or anxious. Some had been diagnosed with dementia or placed on medication, but had no follow-up or supportive services. Many were living independently in their homes but struggling with physical or mental health issues, or an inability to attend to the tasks of daily living.

Program Components

Personal and Family Counseling Services created a geriatric social worker position to work approximately 20 hours per week. This staff member works on site at the senior center 2-3 hours each week, socializing with the seniors and earning their trust. Personal and Family Counseling Services understands that this reticent older adult population is less fearful of accessing social services if the social worker is viewed as part of the center and contact comes about naturally. Therefore, the social worker maintains specific hours so the center staff and its members know when they are on site. The program has become so integrated with the senior center that most of the seniors consider the social worker a member of the center staff.

Eight-five percent of clients access the Senior Outreach Program through the senior center. Others hear about the program from friends, health care providers, hospitals, nursing homes, and home health care agencies

Nearly all social services are provided in the home of the client, where the older adult is most comfortable and the potential stigma is reduced. The social worker provides comprehensive assessments of social, economic, mental health, physical health, and activities of daily living functioning. They then work with the older adult and/or family to determine needs and develop a service plan. The social worker helps the older adult and family navigate the health and social service systems and links them with other community resources and then performs a follow-up to be certain needs are being met.

As the Senior Outreach Program grew and the social worker learned more about the unmet needs of the older adult community, Personal and Family Counseling Services developed a resource referral network. For example, it quickly became apparent that many older

adults had no family members to help with small household chores. The social worker recruited volunteers through churches and other groups to rake leaves, shovel snow, make minor repairs, and provide other services to help older adults remain living in their homes.

Outcomes

The social worker was quickly integrated into the senior center, allowing ready access to this previously difficult-to-reach population. Although the agency anticipated it would take at least three months for the program to get established, within just a few weeks older adults were requesting social services.

Personal and Family Counseling Services used pre- and post-testing that were in agreement that measure depression, anxiety, and other mental health symptoms. Testing is done upon initial assessment and again about six months later or at the end of treatment. The testing reveals that the program has a positive impact on the older adults and their families and caregivers. Once linked with appropriate resources, more than 85 percent of program clients report a significant decrease or alleviation of symptoms.

In addition, Personal and Family Counseling Services has become known as the primary resource for older adult social services in Tuscarawas County. Referrals have increased tremendously and the number of seniors coming into the agency's counseling center also has grown significantly.

Why It Works

Personal and Family Counseling Services began with a clear understanding of the unique cultural attitudes and behaviors of the population in the area. Therefore it determined that the best place to provide services was in the place where they are most comfortable—their home. The home setting also eliminates transportation barriers and removes the stigma or embarrassment of going to a mental health agency.

The senior center is the primary gathering place for older adults in the county. With more than 3,000 members and a welcoming, non-threatening environment,

Quick facts about Personal and Family Counseling Services:

Personal and Family Counseling Services
of Tuscarawas Valley
1433 Fifth St. NW
New Philadelphia, OH 44663
Personal-family-counseling.com

Senior Outreach Program contact:

Marilyn Henry, President and CEO,
330-343-8171, mhenry@pfcs1.org

Personal and Family Counseling Services of Tuscarawas Valley, Inc. (PFCS) is a private, nonprofit family service agency that assists individuals and families by providing many social services, such as counseling, support, advocacy and education, focusing on prevention as well as treatment. Its services are available to all residents of Tuscarawas and Carroll counties.

PFCS began its mission of repairing relationships and building strong families in Tuscarawas and Carroll counties



more than 35 years ago thanks to the visionary efforts of several community leaders. Over the years, PFCS has helped thousands of children, adults, and their families overcome or prevent serious social and emotional problems and forge stronger, more positive human relationships. PFCS is the community leader for advocacy, service, and collaboration resulting in the empowerment, self-sufficiency, and resourcefulness of families. The agency is committed to providing comprehensive strength-based, individualized services to enhance the lives of residents in the community.

the senior center provides the ideal access point to the Senior Outreach Program. It is a highly effective and efficient way to introduce the program to potential clients.

The senior center recognized the social service needs of its members, but without its own social service staff or the ability to provide professional supervision, it could not offer these services. The collaboration is a win-win-win for the agency, the center, and the older adults in the community.

Funding

The Senior Outreach Program does not charge a fee or bill insurance for services. The program was established with a grant from the Alliance for Children and Families New Age of Aging initiative. Within six weeks of implementing the program, the agency knew it would need more funding to meet the demand. Several community foundations provided grants, and the United Way, the senior center, and another foundation responded to a matching grant challenge. The senior center will provide additional funding in 2010. There currently are no individual donors.

Collaborations

In addition to the close collaboration with the local senior center, the Senior Outreach Program works closely with the counseling and kinship care programs within the agency and with other health and human service

providers. Healthcare professionals and the social worker with the Department of Adult Protective Services are particularly strong referral sources. Church groups provide a steady source of volunteers.

Marketing Efforts

Initially the program was promoted within the senior center through posters, brochures, and word of mouth. Once the agency secured additional funding and was able to do more outreach, it sent a brochure and a letter introducing the Senior Outreach Program and the social worker to hospitals, physicians, home healthcare agencies, nursing homes, church groups, and other organizations that routinely see older adults. Referrals began coming in almost immediately.

Lessons Learned

The older adult population in this area is very hesitant about accessing services for social or emotional needs. Providing services in the home reduces fear and stigma. In addition, the best way to reach these older adults is through a close collaboration with a community center or similar organization where older adults congregate.

The only obstacle encountered was the unforeseen speed with which the program became successful. The agency had to quickly find additional funding to maintain and expand the Senior Outreach Program.

Guidelines for Replication

The key to success is a collaboration with a community organization that is the primary gathering place or provider of services to older adults. Seek out organizations that provide recreation, lunch programs, therapy, day care, and other services to seniors. Don't simply rely on the organization for referrals; have your social worker onsite to meet potential clients, gain their trust, and make appointments for in-home visits. In addition, provide services in-home to eliminate most access barriers.

Hire a social worker with extensive knowledge about older adult issues, the skill to successfully reach out to this population, the ability to enlist a supportive network of resources and volunteers, and a high comfort level with working independently.

This unique collaboration gives Personal and Family Counseling Services ready access to a very difficult to reach population. In providing in-home assessment and linking clients with services and resources, the Senior Outreach Program enables older adults to live as independently as possible. ■



Methodology

In May 2009, the New Age of Aging initiative issued a call to Alliance member agencies with direct service programs and in good membership standing to identify model aging programs and best practices.

Organizations were asked to complete an online application and a total of 18 organizations applied to be selected for further study as a New Age of Aging Case Study.

The programs agencies were interested in submitting as case studies were required to meet the following eligibility guidelines:

1. Targeted adults age 60 and older or their families/caregivers;
2. At least one year of program results/outcomes;
3. In operation at the time of application submission and award; and
4. Replicable.

Applicants were selected for case studies based on the following criteria:

1. **Community need and impact:** What demonstrated need did the program address? What was the impact of the program for older adults and their families/caregivers? What was the impact of the program on the community as a whole?
2. **Innovation:** How was the program unique, especially in how it addressed particular community needs?
3. **Outcomes:** What outcomes has the program achieved?
4. **Potential for replication:** Can the program be replicated elsewhere? Have any outlines or guidelines for replication been developed?
5. **Obstacles:** What obstacles have been encountered and how were they overcome?

6. **Lessons learned:** What has been learned through program implementation that would be helpful to others?

7. **Attention to diverse populations:** Has the program involved diverse aging populations, including in terms of ethnicity, culture, language, religion, sexual orientation, geography, income, and disability?

8. **Collaboration:** How does the program interact with other organizations or divisions/departments within the agency?

A team of evaluators inclusive of Alliance staff and member organization staff, the New Age of Aging National Leadership Advisory Committee, and partner organizations reviewed each application between July and September 2009.

Eight organizations with quality aging programs were then selected as semi-finalists. Staff members from each of the eight organizations were invited

to participate in follow-up telephone interviews to obtain more details about the information provided in the applications and also to gain new information that would assist with developing a robust case study for each.

Based on evaluator comments and the information obtained from the follow-up telephone interviews, by October 2009 an Alliance executive team approved the final eight selections.

In addition to this report, descriptions of the eight programs will be posted to the New Age of Aging website (newageofaging.org), and case study publications will be distributed nationally to the Alliance membership network and New Age of Aging partner agencies.

Agencies highlighted in case studies may use the statement "Recognized by the Alliance for Children and Families' New Age of Aging for innovation and quality" in agency and program literature.



Acknowledgements

This report was created to highlight innovative and exciting aging programs and practices to help further the competency of Alliance member agencies and beyond.

The case studies collected in this report will enable others to adopt successful models that will benefit organizations, older adults, their families, and the individuals that work with them, and society as a whole.

The Alliance's New Age of Aging initiative wishes to express our sincere appreciation to the many member organizations that applied to participate in this case study report.

We especially thank the eight selected organizations who graciously and openly contributed to this publication by sharing their experiences with us. The vision, wisdom, energy, talents, and generosity of the agencies profiled in this publication will help us transform the nonprofit human service sector. We hope that readers will be as inspired by their achievements and challenges as we are.

We wish to also extend our gratitude to Patricia Winsten of Miller Winsten Communications for her technical writing support. Also providing support were members of the Alliance staff that include Nancy Kunkler, project management, writing, and editing; Nicole Klaas, Crystal Thompson, and Ann Koerner, interviewing and editorial support; and Steve Monsen and Emily Scheider, graphic design. Without the contributions and unwavering dedication and skill of these individuals, publication of this report would not have been possible.

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new age
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