

Self-Assessment Tool for Volunteer Ombudsmen

Dear Volunteer Ombudsmen:

In our work with you we have sensed the need for a tool that can help you to answer the question, "How am I doing?" Yours is a sometimes tricky and often challenging role. Most of you interface with a variety of people in a variety of situations (and health conditions). Just when we think we've heard everything, one of you tells us about a new scenario! We want to offer as much support as we can.

The paid staff is hoping that this list of questions will supply some helpful guidance and serve as a bit of a review of the responsibilities and parameters of your position. It may even provide some goals to strive for. Please do not feel bad if you cannot answer "yes" to everything. (This especially applies if you are new to the position). We also recognize that an answer of "no" may be for reasons totally beyond your control.

This assessment is intended to help you individually and the ombudsman program as a whole, and of course, the residents whom we serve. Our aim is to discover areas of strength and areas where more attention or training may be needed. Since we are not asking for you to hand it back in, dialog about your answers is critical. Please feel free to call or write to Nancy Cavicke with your feedback (questions, comments).

Thank you very much for taking the time to answer these questions. We believe you'll find it a worthy investment.

--The Ombudsman Program Staff

My work with the residents

- 1) Do all of the alert and oriented residents (who are living in my facility on a long-term basis) know me and my role?
- 2) Do I know their names? Am I familiar with them?
- 3) Are there some long-term residents whom I have never met? What are the reasons for that?
- 4) Am I familiar with the customary demeanor and social behavior of the more confused residents, so that I might pick up on significant changes in them?
- 5) If there is a section in my facility for those with dementia, do I spend time visiting there?
- 6) Do I manage to visit all areas/units/floors of my facility over the course of a month?
If not, what are the reasons?
- 7) Do I manage to attend a significant number (such as half) of the Resident Council meetings in a year? Am I kept abreast of the content of those meetings by receiving a copy of the minutes?
- 8) Do I go to the meetings of the Family Council (if it exists, and when my schedule allows)?
- 9) Do I try to empower residents (and family members whom I meet) to advocate for themselves?
- 10) Am I up-to-date on the facility's grievance procedure and do I direct complainants to follow that?

My work with my contact person(s) and facility staff

Over time the person serving as your contact may have changed, and the administrator may have changed too. Please reflect on whether an effective system is in place for you to air concerns and get action from the administration. Does the Volunteer Coordinator need to provide a review of your role to any of the staff at your facility? (The introductory handouts describing your role can be given to them.)

- 1) How do I go about having problems addressed? To whom do I turn on the staff?
- 2) Is this the same person designated as my official contact?
- 3) Does he or she (or they) have a clear understanding of my role?
- 4) Is my contact receptive to meeting with me, addressing my questions and taking the concerns I raise seriously? Is follow-up provided when I request it? What needs improvement, if anything?
- 5) Does staff ask me to make a point of visiting particular residents? Do they consult me regarding residents' rights dilemmas? *An answer of "no" here is not meant to reflect badly on you. Several factors might influence whether or not they turn to you.*
- 6) Do the head nurses, social workers, program coordinators and other administrative staff who regularly see me, know me and my function?
- 7) Do the caregiving staff (C.N.As./nurses aides/care managers) who see me regularly know me and my function?
- 8) Do we have a friendly, respectful and professional relationship? (Not a cold, distant one, but not a chummy one either?)
- 9) Do I feel that I have been able to establish a cooperative and trusting relationship with the administrative staff? If not, what are the reasons?
- 10) Do I try to point out positive things that I hear or observe as well as negative?

My Role as an impartial advocate

- 1) Do I make it clear to residents, their friends and family members that I am not an employee of the facility, but rather a volunteer advocate for the residents?
- 2) Am I providing other assistance to residents or the facility that might blur the perception of my impartiality? (for instance, assisting with activities)

Complaint Handling

- 1) How do I try to pay attention to possible problems in a variety of areas?
Do I use the *Tips for Advocates* checklist or some other tool?
- 2) How do I keep track of what occurs each visit and keep on top of active complaint issues?
- 3) How do I flag things for following up with my contact(s)?
- 4) Have I inadvertently slipped into a pattern of spending most of my time with "favorite" residents?
- 5) Do I tend to avoid certain residents or certain floors/units?
- 6) If I work in an assisted living facility, do I regularly get inside residents' rooms so that I can observe odors and cleanliness of the room?
- 7) Do the residents regard me as someone who can get things done? What are the reasons that they do or do not?
- 8) Do I perceive myself as someone who can get things done? What are the reasons that I do or do not?

The Monthly Report Form

- 1) If you regularly hand in reports with few complaints or no complaints listed, please answer the following:
 - a) Are you possibly underreporting the complaint activity you have been involved in? (Unless a problem is minor and rectified on the same day that you bring it to the attention of staff, it should be captured as a complaint.)
 - b) Are you using the *Tips for Advocates* checklist to avoid overlooking any aspect of quality care and service?
 - c) Are you confident that you are covering your facility pretty well, that residents and family and staff are familiar with you and your role, and that your facility is providing good care? (If this is the case, then your blank monthly report form is justifiable!)

April 2006