

VOLUNTEER LONG-TERM CARE OMBUDSMAN PROGRAM REPRESENTATIVE INTAKE TOOLKIT ¹

This intake toolkit is designed to assist Long-Term Care Ombudsman programs with the application and screening process for potential volunteer Ombudsman program representatives. The toolkit includes several templates that Ombudsman programs can adapt to meet their individual program requirements.

Volunteer Ombudsman program representatives are invaluable, but due to the unique role and responsibilities of the Ombudsman program there are potential risks that need to be addressed. These risks should be evaluated prior to making changes to a program's intake and screening process and policies and procedures should be evaluated periodically. The [Volunteer Risk Management Considerations for Long-Term Care Ombudsman Programs](#) worksheet highlights areas of risk and tips for reducing risk to help programs identify potential risk, review current program practices, and develop recommendations for improvements. ²

While it can be challenging to find individuals who are willing to volunteer as Ombudsman program representatives, the purpose of the intake process is to ensure that this is a good fit for both the individual and the program. Through the information received on the application form, interviews, and references, this is the time when both parties can determine whether to proceed. Ombudsman programs should not hesitate to decline a potential volunteer that is not a good fit for this unique position, as it is better to do this upfront than to have a situation arise later when the individual has access to residents.

If the program determines the person would be better placed in another role within the program than as an Ombudsman program representative visiting residents, the individual may be able to use their skills for other valuable tasks. Other tasks or projects may include: creating promotional materials, assisting with content for the program's social media accounts, developing community education materials and training, and participating in community outreach events.

Intake Toolkit Table of Contents

- I. Letter to Prospective Volunteer
- II. Key Points for Minimum Volunteer Requirements
- III. Volunteer Application Form
- IV. Volunteer Reference Interview Form
- V. Ombudsman Program Representative Conflict of Interest Form
- VI. Volunteer Acknowledgement Form
- VII. Interview Questions
- VIII. Additional Resources

¹ Examples of volunteer application and screening tools from State Long-Term Care Ombudsman Programs and local Ombudsman entities were used in the development of this toolkit. Many of those examples are referred to in the "Resources" section of the toolkit and are available on the NORC website: http://ltcombudsman.org/omb_support/volunteer.

² *Volunteer Risk Management Considerations for Long-Term Care Ombudsman Programs* worksheet is available on the NORC website in two forms: <http://ltcombudsman.org/uploads/files/support/risk-management-considerations-for-ltcop-worksheet.pdf> (PDF) <http://ltcombudsman.org/uploads/files/support/risk-management-considerations-for-ltcop-worksheet.docx> (Word). The worksheet is based on information from the *Supporting Volunteer LTC Ombudsmen and Minimizing Risk* webinar (http://ltcombudsman.org/omb_support/volunteer/calls-webinars).

Additional considerations for your intake process:

1. Provide multiple ways to apply to volunteer with your program (e.g., by mail, email, on-line). Ensure easy access to information about volunteering with your program. Consider including the following information on your website: overview of volunteer role and responsibilities, steps in application process, application form, training calendar or information about how training is scheduled, brief examples of volunteer successes and/or quotes about why they volunteer for your program, and name, photo, and contact information for volunteer coordinator.
2. As often as possible use examples of volunteer successes, quotes from your volunteers about why they volunteer with your program, and examples of program advocacy in your recruitment and program promotion materials.
3. The time between receiving and reviewing a volunteer application and conducting initial certification training is an opportunity to provide the potential volunteer basic information about the program. By asking a potential volunteer to review basic information about the program before training they may be more prepared for initial certification training and some individuals may realize it is not the best fit for them before investing time in training. Examples of information to share includes:
 - *Equipping Long-Term Care Ombudsmen for Effective Advocacy: A Basic Curriculum (NORC Curriculum): The History and Role of the Long-Term Care Ombudsman Program (Module One)*
 - Module One of the NORC Curriculum Online Training
<https://sites.google.com/site/historyandroleofltcop/home-1>
 - Module materials are also available as PDF and PPT documents
http://ltcombudsman.org/omb_support/training/norc-curriculum
 - Visit the NORC website (<http://ltcombudsman.org/>), especially these pages:
 - About the Ombudsman Program
<http://ltcombudsman.org/about/about-ombudsman>
 - Welcome to the Ombudsman Program Network
<http://ltcombudsman.org/new-ombudsman>
 - Invite the potential volunteer to explore your program's website and social media accounts.
4. Asking potential volunteers to identify at least two references (non-family members) is an important part of the intake process. As you know, volunteers will be working with vulnerable individuals and will have access to confidential information, so the more information you can gather about the applicant is helpful. Although the references will likely provide favorable responses to your questions, by telling the applicant about the role of the program and the type of situations the potential volunteer may encounter, by listening closely you may learn more about the applicant to help you determine whether he/she is a good fit.
5. Orientation and initial training provides several opportunities to ask questions and really listen to the potential representative's response to identify red flags or areas that need more discussion or training. Take advantage of this time to better understand the trainee, their learning process, their skills and interests, and areas for improvement to ensure they truly understand the unique role and responsibilities of the Ombudsman program.