



The National Long-Term Care Ombudsman Resource Center



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Ombudsman Resource Center

Improving the On-Boarding Experience of Potential LTCOP Volunteers

December 3 | 3:00-4:00pm ET





Important Intake Steps Before Training

- ▶ Explanation of the program and volunteer responsibilities
- ▶ Volunteer application
- ▶ Conflict of Interest screening
- ▶ Background check
- ▶ Interview
- ▶ Confidentiality form

Volunteer LTCOP Representative Intake Toolkit

Toolkit: https://ltcombudsman.org/omb_support/volunteer/program-management

- ▶ Letter to Prospective Volunteer
- ▶ Key Points for Minimum Volunteer Requirements
- ▶ Volunteer Application Form
- ▶ Volunteer Reference Interview Form
- ▶ Conflict of Interest Form
- ▶ Volunteer Acknowledgement Form
- ▶ Interview Questions
- ▶ Additional Resources

LETTER TO PROSPECTIVE VOLUNTEER OMBUDSMAN PROGRAM REPRESENTATIVE

Dear _____,

Thank you for your interest in serving as a volunteer Long-Term Care Ombudsman program representative. Volunteer Ombudsman program representatives provide invaluable advocacy with and for residents in long-term care facilities in their local communities. You would join the over 7,000 designated volunteer Ombudsman program representatives that greatly enhance long-term care resident access to the Ombudsman program's services across the country.

The Long-Term Care Ombudsman Program (LTCOP) was established in the Older Americans Act in 1978, following a demonstration project which began in 1972. Each state has a State Long-Term Care Ombudsman program and most states train and designate volunteers to carry out the duties of the program. Our agency, _____, began its Ombudsman Program in _____ and our program supports _____ residents living in _____ nursing homes and _____ assisted living facilities, (add other settings as appropriate).

Ombudsman program representatives advocate with and for individuals residing in nursing homes, assisted living facilities, and other types of residential facilities. Volunteer Ombudsman program representatives receive training and support to visit residents at an assigned facility, provide information about their rights, assist them (upon their request) with their complaints, and submit reports reflecting their activities and case work. Our volunteers are expected to visit residents in their assigned facility.

After receiving and reviewing your application, background check, and conflict of interest form, we will contact you for an interview. Following a successful interview, you will be invited to attend initial certification training. Training includes _____ hours of training on topics such as the history and role of the Long-Term Care Ombudsman program, residents' rights, effective communication skills, resident-directed advocacy, investigating and resolving complaints, and reporting requirements. Upon completion of these activities, the State Ombudsman will make the final decision on designating you as a representative of the Office of State Long-Term Care Ombudsman. For more information about our program visit our website _____.

We look forward to having you as a valuable addition to our program. Please note that the process of becoming a volunteer may take some time but being an advocate for residents will be worth the investment.

Please contact us if you have any questions. _____ (phone, email)

Thank you for your interest.

Sincerely,

KEY POINTS FOR MINIMUM VOLUNTEER REQUIREMENTS

Volunteer position descriptions help further define the minimum requirements and role for potential volunteers in your program. This document includes key points to consider including in your program's volunteer position description.

NOTE: These examples of minimum requirements are based on general Long-Term Care Ombudsman program practice and are provided as a guide. Modify these requirements to meet your needs and your program's policies and procedures.

Minimum Age: 18

Time Commitment: Volunteers must commit to a minimum of _____ hours of service a week/month and/or one year of service.

Transportation: Must have reliable transportation to participate in required training and conduct facility visits. **NOTE:** May want to mention whether your program reimburses volunteers for their mileage or public transportation costs.

Processing Required: Prospective volunteers must successfully complete a volunteer application which contains at least 2 references (non-relatives), a background check form, a conflict of interest form, and an interview with program staff prior to initial certification training.

Automobile Insurance: Volunteers who drive their own vehicle for Ombudsman program work purposes are required to carry liability coverage, at their own expense, for any vehicle used. Volunteers must show proof of insurance during the initial intake and certification process and annually after certification. Volunteers are to immediately notify their supervisor if their automobile insurance coverage lapses.

Requirements: Volunteers must attend _____ hours of continuing education annually to maintain status as a designated representative of the Office.

NOTE: Insert other requirements, such as required number of visits or hours spent in the assigned facility; completing documentation and turning in reports; annual evaluation; adhering to the code of ethics of the program; following policies and procedures, applicable immunizations, etc. Regarding immunizations, most programs do not require them, such as an annual influenza (flu) vaccine and/or bacille Calmette-Guérin (BCG) vaccination for tuberculosis (TB) disease. If your program does require immunizations the potential volunteer should be informed early in the intake process and be provided information about accessing free or low-cost immunizations.

Reasonable Accommodations: For potential volunteers that need a reasonable accommodation in order to complete the application process and/or perform essential duties of a designated Ombudsman program representative, please speak with the program coordinator, _____.

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LONG-TERM CARE OMBUDSMAN PROGRAM INDIVIDUAL CONFLICT OF INTEREST SCREENING TEMPLATE

This document contains information based on the LTCOP Rule, §1324.21(d), Conflicts of Interest. The content is adapted from similar tools developed by State Ombudsman programs, such as Ohio, Texas, Oklahoma and Iowa. This template is intended for use as a guide when Ombudsman programs develop or revise individual conflict of interest screening tools. States are responsible for adding any state specific requirements, definitions, or processes that may not be included in this document. Additional information on individual conflicts of interest, the provisions in the Rule, and examples of screening tools used by Ombudsman programs can be accessed [here](https://ltcombudsman.org/omb_support/volunteer/program-management).

Name: _____ **Date:** _____

Address: _____ **Phone:** _____

Email Address: _____

Employment and Responsibilities

Have you or any members of your immediate family or household ever been employed by a long-term care provider (facility or by the owner or operator of a facility)? Immediate family means a member of the household or a relative with whom there is a close personal or significant financial relationship. (§712 of the Older Americans Act, §1324.1, Definitions, LTCOP Rule.) Yes ☐ No ☐

Do you, or any members of your immediate family or household, receive or have the right to receive, directly or indirectly remuneration (in cash or in kind) under a compensation arrangement with an owner or operator of a long-term care facility? Yes ☐ No ☐

Are you working for, or have you worked for, an association (or an affiliate of an association) of long-term care facilities or of any other residential facilities for older individuals or individuals with disabilities? Yes ☐ No ☐

Are you providing care, or have you provided care, for residents of long-term care facilities or involved in the provision of personnel for long-term care facilities? Yes ☐ No ☐

Are you currently participating in the licensing, certification, and/or surveying of long-term care facilities, or have you in the past? Yes ☐ No ☐

VI. VOLUNTEER ACKNOWLEDGEMENT FORM

NOTE: This document is intended to be reviewed with the trainee following a discussion of the program's policies and procedures as part of the orientation process.

I. CONFIDENTIALITY

I understand that the Long-Term Care Ombudsman Program provides resident-centered advocacy and has specific and strict federal provisions regarding confidentiality and disclosure of information. These requirements mean that the information shared with or gathered by the program, including the identification of the resident or complainant, is confidential unless consent is obtained as described in the Older Americans Act and Long-Term Care Ombudsman Program (LTCOP) Final Rule. I understand that as a representative of the Office of the State Ombudsman, I will become aware of information regarding residents, complaints, facilities, staff, and program activities related to cases, that must remain confidential. I agree to follow program policies and procedures regarding confidentiality and disclosure.

II. CONFLICT OF INTEREST

After completing the Ombudsman Program Representative Conflict of Interest Form and at the time of this application, I have disclosed all potential conflicts of interest and agree to inform the program if a new conflict of interest should develop.

III. PROGRAM POLICIES AND PROCEDURES

I agree to adhere to the _____ program policies and procedures and Code of Ethics as were reviewed and discussed with me.

By signing this acknowledgement form, I am affirming that I read, understand, and agree to adhere to these requirements.

Signature _____ Date _____

¹ Older Americans Act of 1965, Section 712 (d)(2)(A)

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Speakers

► Speakers

- Stephen Maxwell Stephen.Maxwell@illinois.gov
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- Kaleena Morgan KMorgan@sowegacoa.org

VOLUNTEER CERTIFICATION TIME RESEARCH AND IMPROVEMENTS

Stephen Maxwell

Ombudsman Training Coordinator

State of Illinois



ILLINOIS LTCOP

- ▶ Decentralized
- ▶ 13 regions
- ▶ 17 regional programs
- ▶ Building our volunteer force
- ▶ Hybrid trainings
- ▶ State Office oversees most trainings



Roughly half of volunteer trainees do not become certified

FIELD
OBSERVATIONS

- ▶ Paid staff: 93.3% (n=75)
 - ▶ First year turnover is 20%-30%
- ▶ Volunteers: 60% (n=45)
 - ▶ 15% need to retake training to certify
 - ▶ First year turnover 0%.
 - ▶ Turnover seems to peak after 6 years.

CERTIFICATION RATES 2021-PRESENT

- ▶ Paid

- ▶ 29 days (average)
- ▶ Min: 5 days
- ▶ Max: 98 days

- ▶ Volunteers

- ▶ 108 days (average)
- ▶ Min: 24 days
- ▶ Max: 185 days

TIME TO CERTIFICATION

- ▶ Some are trying to improve chances of getting a job with the agency
- ▶ Difficulty in scheduling shadowing
- ▶ Program is not the right fit for them
- ▶ Confusion about the certification process
- ▶ Delayed response from State Office

WHY THE DROP OFF?

- ▶ Explained certification process
- ▶ Optional pre-training informational meeting by the State Office
- ▶ Post-training follow-up with trainees
- ▶ Follow up with coordinators

COMPLETED STEPS TOWARD
IMPROVEMENT

A series of white diagonal lines of varying lengths and thicknesses, located in the bottom right corner of the slide, creating a modern, abstract graphic element.

- ▶ Reminding Regional Ombudsmen to send requests to entire State Office.
- ▶ Encouraging pre-training shadowing
- ▶ Train more trainers
- ▶ Refocusing our volunteer recruiting brochure

COMING STEPS TOWARD IMPROVEMENT

What does a volunteer Ombudsman do?

- Visits residents on a regular basis;
- Listens to residents' concerns and problems
- Reports to an Ombudsman Supervisor who will guide and direct volunteers while they respond to residents.

What does a volunteer Ombudsman do?

As a volunteer, you will work to improve the lives of long-term care residents by making unannounced visits to care communities, talking with residents to identify concerns, and then advocating at their direction. Volunteers report their activities to their designated ombudsman supervisor.

"The Ombudsman Program gives me the opportunity to continue to serve others.

-Angel, Volunteer Ombudsman

Ombudsmen make a difference!

Here are examples of ways ombudsmen have helped residents live their lives in the ways that they want to.

- Advocated to add a resident's morning routine into his care plan.
- Improved the Resident Council by sharing best practices.
- Helped a resident who had experienced abuse file a formal complaint.
- Helped residents when they had disagreements with their loved ones.
- Advocated to legislators to increase the Personal Needs Allowance in Nursing homes.

- ▶ Does it tell WHY they should be ombudsmen?
- ▶ What do volunteers get out of it?
- ▶ How can you make a difference?

QUESTIONS?



Improving the On-Boarding Experience of Potential LTCOP Volunteers

Lin Chao, Ombudsman Services Coordinator

Kaleena Morgan, South Program Coordinator



Introduction

- The Ombudsman program plays a vital role in advocating for long-term care residents.
- Recruiting great volunteers is not enough – effective onboarding ensures they stay, learn, and excel.
- Goal: Build a clear, supportive, and motivating onboarding journey.

Why Onboarding Matters

-
- Shapes the volunteer's first impression of the program
-
- Increases confidence and preparedness
-
- Reduces early dropout rates
-
- Strengthens commitment to resident advocacy
-
- Ensures compliance and competence

Current Onboarding Challenges

- Information overload or unclear expectations
- Long wait times between steps
- Inconsistent communication
- Limited opportunities to ask questions or connect
- Training feels overwhelming for newcomers
- Uncertainty about program structure or roles



What Volunteers Need



- Clear, simple steps from application to certification



- Personal connection and encouragement



- Consistent communication



- Structured training with hands-on practice



- Mentoring and shadowing opportunities



- Feedback and check-ins after placement

Pre-Onboarding Best Practices



- Send welcome email package



- Provide role descriptions and expectations



- Supply required documents (applications, background check forms, confidentiality agreements)



- Offer an overview of training schedule and certification requirements

Pre-Onboarding Communication

- Assign a primary point of contact
- Provide FAQ sheet and program overview video
- Give volunteers a chance to ask questions in advance
- Encourage them to share schedule preferences and interests

Enhanced On-Boarding Framework

1. Awareness & Recruitment
2. Application & Screening
3. Welcome & Orientation
4. Role-Specific Training
5. Shadowing & Field Support
6. Competency Assessment
7. Certification & Placement
8. Ongoing Engagement & Retention

On-Boarding: How does it work?

Phases:

- First Day
- First Weeks
- First Months
- Assimilation

Sample Onboarding Timeline

Day 0–3: Acknowledgment & Welcome

Week 1: Orientation + Access to materials

Weeks 2–3: Core Training

Weeks 4–6: Shadowing & On-Site Visits

Week 6+: Certification & Facility Placement

Ongoing: Support, CEUs, Recognition

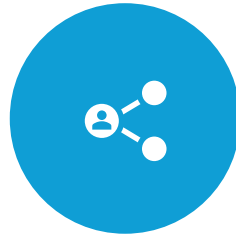
Measuring Success



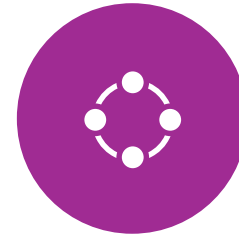
- VOLUNTEER
SATISFACTION
SURVEYS



- COMPLETION
RATES OF TRAINING



- RETENTION AT
6 AND 12 MONTHS



- VOLUNTEER-
TO-STAFF FEEDBACK
LOOPS



- RESIDENT
ADVOCACY
OUTCOMES

Final Takeaways

- Prepare volunteers before they start
- Provide structured training & shadowing/mentorship
- Support integration through strong communication
- Recognize contributions and offer ongoing learning
- Continuously refine based on feedback







Questions &
Open Discussion



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Connect with us!

-  ltcombudsman.org
-  ombudcenter@theconsumervoice.org
-  The National LTC Ombudsman Resource Center
-  @LTCombudcenter

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