Connecting Generations, Strengthening Communities

A TOOLKIT FOR INTERGENERATIONAL PROGRAM PLANNERS

HANDBOOK

TEMPLE UNIVERSITY
CENTER FOR INTERGENERATIONAL LEARNING

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Acknowledgments

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Preface

Try to imagine:

- A society in which young people and older adults are appreciated for the resources they bring to their communities, rather than viewed as problems to be solved
- Communities in which people of all ages come together to serve, learn, and have fun
- Public policies that support families caring for vulnerable children and adults, encourage and foster lifelong learning, and ensure that people at all stages of life have access to quality health care and social services

This vision is a far cry from the reality that exists in our 21st century society. Although today's teens volunteer in greater numbers than ever before, reports about teen violence, pregnancy, and drug abuse permeate the media and influence our perceptions of the young. Older adults, many of whom want to contribute to their communities, often have limited opportunities to engage in compelling volunteer roles. Clearly, there is a gap between the promise and the practice of volunteerism by these two age groups. In addition, such institutions as child day care centers, senior centers, schools, and recreation facilities tend to segregate people by age, thus limiting interaction across ages. Policies, too, often discourage the sharing of resources and creative problem-solving among organizations that serve different age groups.

Connecting generations can reframe the way that we view youth and elders, organize institutions, and approach public policy.

Somehow we have to get older people back close to growing children if we are to restore a sense of community, a knowledge of the past, and a sense of the future.
—Margaret Mead

Why is it so important to connect generations now?

- *Our aging society.* Today, there are 34 million people age 65+ in the United States; by 2030, this number will almost double due to the aging of the baby boomers. Many older adults are seeking ways to remain productive and to live a life that matters. Others need assistance as they deal with some of the challenges of later life. Creative strategies are needed to ensure that opportunities and services exist to enhance the quality of life for this rapidly growing segment of our population.

- *Fraying of the social compact.* As children, we expect our parents to care for us and invest in our future; as adults, we expect to give back—caring for our aging parents and passing on our gifts to our children and grandchildren. This is the social compact—the obligations that different generations have to one another over time. However, high divorce rates, a rise in single-parent families, and geographic mobility have put a strain on the ability of different generations to maintain the social compact. In both our families and our communities, we need to redefine the roles and responsibilities of people at each stage of life and create ways to strengthen the ties that bind us.

- *Unmet needs.* Insufficient resources are available to address the many problems that face individuals, families, and neighborhoods. Many young people lack caring adults to help them navigate the treacherous path to adulthood. Many older people experience a sense of isolation. Families, too, need support as they try to care for their children, parents, spouses, and extended family throughout the life cycle.

Intergenerational strategies—programs and policies that involve the transfer of resources and care across generations—have become effective vehicles for meeting individual needs and strengthening communities. Over the past 35 years, thousands of programs have been developed that mobilize youth and older adults to serve as resources to one another and to their communities. In the 1970s, these activities focused primarily on dispelling age-related myths and stereotypes. The 1980s and 1990s saw the emergence of programs that were designed to address specific community needs, such as literacy, drug abuse, and social isolation. Today, not only are cross-age programs continuing to address societal concerns, they are also increasingly becoming part of more comprehensive community-building strategies. People of all ages come together to address local and global environmental concerns, to ensure that cultural traditions are transmitted from generation to generation, and to participate in coalitions to encourage social and political change. Through intergenerational programs, people of different ages are contributing to one another's growth and development while at the same time forming bonds and enhancing their own lives.

This handbook is designed to help educators, health and human service providers, and community leaders effectively plan and implement a wide range of intergenerational programs. It is our hope that these programs will nurture, support, and strengthen individuals, families, and communities. The survival of our society depends on people of different ages, races, and ethnicities recognizing that all of us are interdependent—that our lives are inextricably linked. By systematically connecting generations, we can create caring communities where all of us can grow, contribute, and learn from one another.

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How to Use This Toolkit

Information in *Connecting Generations, Strengthening Communities* is relevant to a wide range of people who are interested in mobilizing all age groups to strengthen their communities. The Toolkit helps people who have no experience in intergenerational programming to explore options and get new initiatives off the ground. It also provides information to those people who want to enhance existing intergenerational programs. Organizations that may be interested in using *Connecting Generations, Strengthening Communities* include the following:

- Educational institutions
- Community-based organizations serving youth, older adults, and/or families
- Faith-based institutions
- Neighborhood associations
- Government agencies (such as Area Agencies on Aging and Children and Family Services Departments)
- Arts and cultural institutions
- Housing departments or developments
- Health promotion agencies

Whether you are a program planner, teacher, volunteer coordinator, social service provider, or community organizer, the information contained in this Toolkit will help you better understand how to effectively use intergenerational strategies to address individual and community concerns.

Connecting Generations, Strengthening Communities includes a 13-chapter handbook, a CD-ROM Toolbox, and a 15-minute video/DVD.

The Handbook can be read cover to cover or consulted as an ad hoc resource. If you are thinking about launching an intergenerational program, read the handbook from start to finish to review the knowledge and tools you'll need. The handbook chapters are organized to take you through the sequence of planning, implementing, and sustaining an intergenerational program. If you are already managing a successful program, you may want to consult selected chapters to help expand or enhance your efforts. Every chapter concludes with a list of additional resources. All materials can be adapted to fit a variety of programs and organizations.

The CD-ROM Toolbox includes a variety of downloadable forms that you can use to help plan a program, examples of training curricula and other materials from successful intergenerational programs, links to resources and suggestions for group activities and training exercises you can do in your own program. The CD-ROM has its own Table of Contents.

The *Connecting Generations, Strengthening Communities* Video/DVD demonstrates a range of intergenerational programs and some of the many benefits of such programs for children, older adults, families, and communities. Use this video to motivate your colleagues, potential organizational partners, and program participants.

We hope that *Connecting Generations, Strengthening Communities* helps you in your endeavors to begin or enhance an intergenerational program. However, given the expansiveness of the intergenerational field, this Toolkit is not an exhaustive resource. Further resources are continually posted on the Center for Intergenerational Learning's Web site: www.TempleCIL.org

Chapter 1

Using Intergenerational Approaches to Meet Individual, Family, and Community Needs

I think it's the desire of every human being to feel that they are contributing something in life. We have helped somebody along the way — some child to learn to read.
—Older adult tutor

You learn things that you never thought you'd learn from them. It's not a boring thing. You find a lot of enjoyment in it too. When you go home, you feel like, "Yo, I actually had a good conversation with somebody. I made them happy. They made me happy." It's sort of like a give-give situation.
—High school student in reading group with retirees

Over the past 30 years, the United States has witnessed the development of a growing number of programs dedicated to fostering collaboration, learning, and service across generations. In schools, senior centers, long-term care facilities, child care centers, libraries, and recreation centers across the country, thousands of older adults and youth are engaged in cross-age activities. These intergenerational programs create opportunities for older and younger generations not only to recognize and share their skills, needs, and experiences with one another, but to address critical community needs as well. This handbook is designed to help you develop and implement any kind of intergenerational program that meets the needs of your community.

What defines an intergenerational program? Although intergenerational relationships exist between people of all ages, what makes an intergenerational program unique is the intentional involvement of older adults with people from younger generations. The International Consortium of Intergenerational Programs describes intergenerational programs as "social vehicles that create purposeful and ongoing exchange of resources and learning among older and younger generations" (Kaplan, Henkin, & Kusano, 2002). In addition to structured programs, intergenerational exchange can be fostered through policies, services, and education.

Just as there are a variety of intergenerational program models, there are many reasons to do this kind of work. Some initiatives may grow out of a desire to promote cultural continuity or cross-cultural awareness, whereas others are intended to foster the healthy growth and development of individuals, increase civic engagement, and enhance the ability of families to care for a member with special needs. Ultimately, the goal of these structured initiatives is to promote interdependence across generations and help us move toward an age-integrated society.

A survey of the many different kinds of programs that exist may help you envision how an intergenerational approach could work in your community.

EXAMPLES OF PROGRAM MODELS

There is not a fixed set of intergenerational program models. On the contrary, you can enhance almost any service or program by using an intergenerational approach. The intergenerational programs that work best are developed in response to identified social needs.

Both general ideas and concrete examples of how intergenerational strategies can be used to strengthen individuals, families, and communities in a number of different areas are provided below. But keep in mind that this is only a sample of the range of intergenerational programs across the country. You can also create a new program model in response to other needs your community may have. There is no limit to the possibilities!

Education

Poor literacy among children and adults is a significant concern throughout the United States and many other parts of the world. Helping children learn to read or improve their reading skills is a common intergenerational activity. In many communities, older adults go into schools to read with children in their classrooms. Children also visit senior housing and long-term care facilities to read with the residents there.

- *Experience Corps®*, a national child literacy initiative operating in 14 cities, mobilizes older adults to devote 15 hours per week to enhancing the reading and writing skills of students in elementary schools. Participants receive training and support, work in teams, and receive stipends based on the number of hours served.

Programs that help people learn to read and write in their native language, or that help immigrants learn to communicate in the language of their new country, provide an essential service by teaching a basic skill.

- *Project SHINE* (Students Helping in the Naturalization of Elders) recruits and trains students at 22 colleges and universities across the country to teach English to older immigrants and refugees to prepare them to become U.S. citizens and to help them access health care services.

Tapping into the unique skills of different age groups is an effective strategy for building cross-age relationships and expanding the abilities of all generations. Retired tradespeople (e.g., electricians, painters, carpenters) have helped young people in vocational schools enhance specific skills and learn the "tricks of the trade." Youth with technology skills can be particularly helpful to older adults who may lack opportunities to work with computers.

- *STACK* (Students Teach Adults Computer Knowledge) is a program in Yonkers, New York, in which older adults go to local high schools and work one-on-one with high school students for six weeks to learn computer skills. The opportunity to be a teacher results in increased confidence and social skills among the students, and also reinforces their computer knowledge.

Positive Youth Development

Growing recognition that the presence of a caring adult in the lives of children—particularly those most at risk of engaging in unhealthy behaviors—has led to a proliferation of programs matching older adults in one-to-one relationships with youth.

- *Across Ages*, a drug prevention program replicated nationally, matches older adult mentors with middle school children, teaches life skills, and engages children in community service activities.

- Maryland's *Bridges* program matches English-speaking older adults with immigrant children to ease their transition to American society.

- Chicago's *Grandma Please* links latchkey children with older volunteers by phone. Volunteers reassure children who are lonely, mediate arguments between siblings, help with homework, and listen to the children's news of the day.

- *The San Pasqual Academy*, a residential facility for foster youth, engages older adults in mentoring the students in independent living skills and helping them transition out of the foster care system.

Family Support

Intergenerational initiatives can address a variety of family caregiving needs.

- *Family Friends*, coordinated by the National Council on Aging, is a network of programs that enlist older adults to provide respite and emotional support to parents who are raising children with special needs.

- *Kin Net* (Kin Nurturing, Educating, and Teaching), spearheaded by Generations United, is a national network of support groups and online assistance for grandparents and other relatives raising children within the foster care system.

- *Mentoring Matters* in Worcester, Massachusetts, pairs older adults with single teen parents or women with substance abuse problems and their children. Mentors, who receive free tuition and participate in a college course on intergenerational service, help their partners find employment, attend school, work through relationship issues, and deal with financial problems.

In addition, several intergenerational housing initiatives have been designed to support kinship caregivers and children in foster care.

- *Grandfamilies*, in Massachusetts, is a specially designed housing development for grandparent-headed families that includes 26 apartments, an on-site preschool, an after-school and computer learning center, and on-site support for caregivers.

- *Hope Meadows*, a planned community in Illinois, offers rent-free housing to families who parent three to four foster children. The families and children receive extensive support from older adult volunteers who also live at Hope Meadows for reduced rent. The result is an extended family network in which children have many "grandparents" to whom they can turn.

Elder Care

Throughout the country, young people provide companionship and concrete assistance to isolated older persons by performing chores or services for disabled elders, visiting residents of long-term care facilities, and conducting oral histories.

- In New York City, *DOROT*—the Hebrew word for "generations"—recruits and trains young volunteers and matches them with homebound elders for weekly visits that enhance the lives of both groups.

- In Philadelphia, the *Time Out* program recruits college students to provide low-cost respite care to families caring for elderly members.

Child Care

An increasing number of older people are serving as paid and volunteer caregivers in both pre- and after-school programs. Older workers can bring stability to day care centers, which are often plagued by high staff turnover. Many older workers also have experience in raising children.

- *Side by Side*, run by Generations Together in Pittsburgh, is an intergenerational child care program that involves teams of older and younger caregivers providing day care services.

- *The Rainbow Intergenerational Child Care Center* in Miami, Florida, hires older Cuban-born women as part-time teachers for more than 100 young children, who are mostly from working-class families.

- *The First Five Commission of San Diego County* funds child care agencies to hire older adults to serve as mentors for young children (from infancy through age 5) and their families, so that every child in the county receives the support he or she needs to enter kindergarten "ready to learn."

Shared Sites

The emergence of shared sites, places that intentionally offer services to both children and older adults, is another exciting new development on the intergenerational landscape. Nursing homes with on-site child care centers, senior centers offering after-school programs, and senior centers within schools are all examples of this growing phenomenon. However, the most common shared-site model is one in which adult day services for frail elders and child day care services are located in the same building. Typically in this model, the child day care and adult day care operate both independently and jointly, with the children and adults receiving expert age-appropriate care. In addition, there are multiple opportunities, through formal programming and informal contact, for children and adults to interact.

For years in Westchester County, New York, children from the Mount Kisco Day Care Center (MKDCC) visited with adults at My Second Home, a nearby adult day services program. These visits were so successful that MKDCC and My Second Home became partners and relocated to a state-of-the-art shared facility. At the new MKDCC, children and adults have some separate programming but also have opportunities to interact throughout the day.

"For some of the children, these are surrogate grandparents," says a classroom teacher at MKDCC. "This gives children opportunities to build their self-esteem, to increase their language development, to increase their social skills, and to be tolerant of older people and the differences in their abilities."

The adult day staff also note benefits for their clients. "The seniors change a lot," says one caregiver. "When they see the kids, they're much calmer. They forget their aches and pains. It's all love and affection for the kids."

The classroom ambience changes when the senior volunteers are around. It is surprising that one single senior volunteer can make a major difference in how the teacher is able to more effectively manage a class full of preschoolers. The children . . . seem to make an effort to be on their best behavior, to be more interested and excited about the activities.
—Evaluator, Senior-Kupuna in the Preschools Project, Honolulu, Hawaii

Building Communities

Initiatives that involve youth and elders working together to build healthy, inclusive communities are becoming increasingly popular.

- In Florida, the *Miami-Dade County Public Schools* have developed a wide range of intergenerational initiatives, such as the Intergenerational Citizens Action Forums, which are organized jointly by youth and older adults. These initiatives focus on such issues as social security reform, the impact of violence on youth, health care reform, and environmental protection.

- *The Habitat Intergenerational Program* in Belmont, Massachusetts, brings together older adults and youth to provide environmental community services. Most recently, the program convened an intergenerational women's group to design and plan a large herb garden. The program also sponsors a number of service-learning projects with local middle-schoolers.

- *Elders Share the Arts* in New York City has conducted a wide range of intergenerational projects designed to build connections between schools and senior centers or long-term care facilities. Projects have included mapping a neighborhood's history and using theater to highlight social and political issues.

Workforce Development

The long-established practice of professional mentoring has been adapted to prepare older adults for new careers and to help young people struggling with career decisions.

- *Howe-To Industries*, an entrepreneurial project developed by Clemson University in 1993, brought long-time residents and new retirees in South Carolina together with at-risk youth to operate their own country market.

- *Health Careers Partnership*, a career development program for younger persons created by the Isabella Geriatric Center in New York City, provides high school students at high risk of dropping out with the formal training required to become a New York State-certified nursing assistant.

- *Workforce Wisdom*, a project developed by the Illinois Intergenerational Initiative, has created materials designed to encourage older retirees throughout the state to participate in school career days and career fairs.

- *The San Diego County Health and Human Services Agency* developed a mentoring program in which older adults work with families, employers, courts, and health clinics to help high-risk families sustain employment and support their children in school.

Transmission of History and Culture

Through extensive dialogue, older adults and young people can gain much insight into both their own lives and cultural traditions and those of others. These exchanges help the past come alive. They allow participants to reflect on which values are permanent and which are transitory, and ensure the continuity of one's people and one's traditions. Bringing individuals from different backgrounds together to explore the past can also foster cross-cultural understanding and strengthen communities.

- *Oral history projects* are perhaps the most common way in which culture and history are shared. In these, younger people learn about older people's lives and create a product—such as an essay, a mural, or a play. Oral histories can either be the centerpiece of a program or can be a tool for older adults and young people who are working together, such as mentors and mentees, to get to know one another better. At Elmira Jeffries nursing home in Philadelphia, a class of sixth-graders visited residents over the school year. Teams of two or three students first interviewed a resident to learn his or her life story. The students then collaborated with their residents to create paintings on canvas that illustrated the residents' lives. The residents were given the paintings at an end-of project celebration in which the students gave speeches about each resident.

- *Healing History* offered Holocaust survivors the opportunity to visit their former German communities and engage in a structured dialogue with German youth in order to promote mutual understanding. Participating youth reported increased empathy and respect for the elderly survivors, a more vivid understanding of the past, and recognition of the role that youth can play in contributing to a better future. The older adult participants, who were otherwise ambivalent about their visit to Hamburg, unanimously said that it was easier to talk with the young people in Hamburg than with the adults.

Health and Legal Issues

Over the past few years, several intergenerational program models have been developed in which retired professionals in the health care and legal fields use their skills to continue helping their community. Intergenerational approaches are also being used for health education.

- At *Samaritan House* in San Jose, California, a group of retired physicians, nurses, and social workers provide free care to more than 500 patients a month.

- At *Legal Services for Children*, a new initiative in New York, retired lawyers serve young, low-income clients free of charge.

- Philadelphia's *Full Circle Intergenerational Theatre Troupe* engages audiences of all ages in workshops designed to raise awareness of public health issues, such as secondhand smoke pollution and obesity.

WHO BENEFITS FROM INTERGENERATIONAL PROGRAMS?

Now that you've had a glimpse of the many ways that communities can bring together different generations to address a variety of concerns, you may wonder about the unique benefits of intergenerational programs. Both formal evaluations and anecdotal information point to many benefits. In addition to alleviating target concerns, such as low literacy and caregiver stress, there are broad implications in terms of feeling supported, reducing isolation, and increasing understanding between people from different generations.

Older Adults

Studies have shown that older adults participating in intergenerational programs enjoy the following benefits:

- *They describe enhanced life satisfaction.* Older adults volunteering with the Ozarks Area Foster Grandparent Program reported that foster grandparenting contributed to their definitions of successful aging and life satisfaction. Interviews suggested that the volunteers were "looking toward the future as an opportunity for reaching out and helping others" (Fisher, 1995, pp. 248-249).

- *They experience decreased isolation.* Long-term care residents, who would previously rarely leave their rooms, became more active in general facility activities after participating in an intergenerational program (Bressler, 2001).

- *They express fulfillment and a sense of meaning* in having something to contribute. Older adults are usually very enthusiastic about the impact they see that they have on youth (Larkin, 2002).

- *They believe that their knowledge and experiences are valued by others.* In addition to the positive feedback they receive from the youth and families they work with, older volunteers report that their own families and friends express admiration of their accomplishments (Bressler, Henkin, & Jackson, 2004).

- *They develop meaningful relationships.* Depending on the type of program, participants can develop significant one-to-one relationships. Some of these are short-term but with a lasting impact. Other relationships last for years, and grow and change over time (Taylor & Bressler, 2000).

- *They learn new skills and gain insights about young people* (Rinck, Naragon, & St. Clair, 1995).

- *They report appreciation* for the instrumental help provided by young volunteers and the feeling of being involved again in their communities (Osborne & Bullock, 2000).

Fostering Successful Aging

Older adults tutoring elementary school children through Experience Corps in Baltimore, Maryland demonstrated statistically significant improvements in health, overall life satisfaction, mood, motivation, feelings of self-esteem, productivity, energy, and reports of the number of people they felt that they could turn to for help compared with a similar group who did not participate in the program (Fried, Carlson, Feedman, et al., 2004).

Children and Youth

Young people also have much to gain from participating in intergenerational programs. Research has shown that children and teens experience the following outcomes:

- *They report improved self-esteem and self-worth.* At a time when peer pressure dictates most of what a young adult does and says, time spent under the non-judgmental gaze of an older adult can be like a breath of fresh air. Youth participating in intergenerational programs benefit both from the increased nurturing and personal attention they receive, and from the opportunity to nurture and attend to others (LoSciuto, Townsend, Rajala, & Taylor, 1996).

- *They demonstrate improved behavior.* Students who are restless or have behavior problems in the classroom are respectful and calmer when they are with older adults, and their behavior at school and with others improves (Newman, Morris, & Streetman, 1999).

- *They show increased involvement in schoolwork.* Children in school-based intergenerational programs are motivated to learn; they want their older partners to be proud of them, and they are inspired by the resiliency of older adults. Students demonstrate improvement on important school indicators, such as decreased truancy (Brabazon, 1999) and academic performance (Turnbull & Smith, 2004).

- *They have a sense of continuity.* Through in-person accounts of history, young people have a context for their own lives, which encourages them to reflect on their backgrounds and behavior (Perlstein, 1998–1999).

Families

Families participating in intergenerational programs have also been shown to reap significant benefits:

- *They are connected to dependable support systems.* Although families have always been the major providers of support for individuals over the life course, increased involvement of women in the workforce, high rates of divorce, and geographic mobility have made family life more difficult. Caregivers who have received emotional support, respite, and companionship from older adult and youth volunteers have reported reduced feelings of stress and isolation and an improved sense of security and self-esteem (Osborne & Bullock, 2000; Power & Maluccio, 1998–1999; Rinck & Hunt, 1997).

In high school I had rough times, but my mentor stuck with me and I stayed out of trouble because of him.
—Teen mentee

Time Out offers me a break from everyday routines of caring for my frail, elderly mother who lives with me and my husband. It helps so that I don't feel so confined or in a rut. It offers my mom and me a change.
—Adult child of an older parent

- *They are more likely to stay together.* The evaluation of Homefriends, a child-neglect prevention program in which older adults mentor families who are at risk of or have been reported for child abuse and neglect, revealed an important finding concerning the program's impact on family preservation—a statistically significant difference between families with and without Homefriends mentors in terms of the number of children being placed in foster care (Coughey, 2001). Of families participating in Time Out, a program in which college students provide respite services for families caring for a frail older adult, 96% attributed their ability to keep their relative at home to program participation (Campbell, 2002).

Neighborhoods and Communities

The benefits of intergenerational programs extend beyond individual participants to the communities in which they are based. Research shows the following positive outcomes for neighborhoods and communities that have intergenerational programs:

- *Residents who tend to be aware of* and appreciate local cultural heritage, traditions, and histories. In the Netherlands, a program bringing together seniors and youth for neighborhood reminiscence resulted in "new bonds, mutual respect and even friendships . . . between age- and cultural-groups who until recently had little or no contact with each other" (Mercken, 2002, p. 82).

- *Greater collaboration* regarding neighborhood and community issues among public and private organizations and corporations that previously tended to address only the concerns of separate constituencies (Ponzetti & Ponzetti, 1999).

- *Heightened commitment to citizenship* and community among the young and the old (Groundwork Yonkers, 2004). In Neighborhoods 2000, groups of older adults work with classes of fourth- through sixth-graders to assess and then address community needs. Outcomes for the participants included the eradication of age-related stereotypes, the emergence of intergenerational camaraderie, a heightened commitment to citizenship and community activism, and follow-up involvement in community improvement projects (Kaplan, 1997).

In Closing

People all over the world are creative in their use of intergenerational programming as a vehicle for strengthening communities. Looking at your own community and/or organization through an "intergenerational lens" will expand your vision and help you better meet your goals. The chapters to follow describe how intergenerational programs are designed, and provide practical information for creating and strengthening programs that bring together generations in your community.

It's really interesting to see older white adults dealing with kids from the "hood." We give them a common ground by dealing with simple things, like plants and nature.
—Outreach coordinator, Groundwork Yonkers, an intergenerational community-building program

IN THE **CD-ROM Toolbox**
- **Intergenerational Links:**
  I. General Resources
  II. Publications
  III. Intergenerational programs and organizations named in the Connecting Generations, Strengthening Communities handbook.

RESOURCES

I. ORGANIZATIONS

Generations United, a national intergenerational advocacy organization, maintains a comprehensive Web site, with support from Verizon. The site includes *i-PATH*, an on-line resource center that connects and encourages intergenerational programs and strategies. GU's i-PATH is the gateway to the most comprehensive online library of knowledge regarding *Intergenerational Programs, Actions, Technologies, and How-To*. Find intergenerational programs nationwide through a free, searchable directory. Discover information about resources and upcoming events, model programs, training, and links. www.gu.org.

Penn State University Cooperative Extension System – Intergenerational Programs and Aging has a Web site full of rich resources: downloadable manuals on intergenerational topics such as shared sites, kinship care, environmental projects, and activities. There are research articles and links, newsletters, and information about international intergenerational activities. http://intergenerational.cas.psu.edu

Civic Ventures, a nonprofit organization that works to expand the contributions of older adults to society, is the parent organization for Experience Corps. Civic Ventures' research and publications emphasize the desire of Baby Boomers and older adults to creatively contribute to their communities. Visit Civic Ventures' Web site for informative research, essays, descriptions of innovative programs and profiles featuring people 50 and older in service. www.civicventures.org.

The Corporation for National and Community Service (CNCS), the federal agency responsible for promoting civic engagement, is the country's repository of service opportunities. CNCS oversees Senior Corps, AmeriCorps, VISTA, RSVP, and Learn and Serve — national programs that mobilize older adults, young adults, and students in service. Visit the CNCS Web site to learn about these programs, as well as funding opportunities, and to find state offices. www.nationalservice.org.

The National Council on the Aging (NCOA) runs several programs that provide resources for programs that engage older adults as volunteers: *RespectAbility* is a national effort to increase civic engagement among older people. The National Center for Family Friends has on-line training and program development materials that can be adapted to a variety of programs. BenefitsCheckUp is an online screening tool for federal, state and private benefits for older people. www.ncoa.org.

Temple University's Center for Intergenerational Learning has free downloadable resources on program planning and evaluation reports. Replication manuals, training materials, and videos on a wide variety of intergenerational programs are available for purchase. The Center provides individualized training and technical assistance to organizations that want to start or strengthen intergenerational programs or implement strategies to engage older adults as volunteers. Visit the Center at www.TempleCIL.org.

II. PUBLICATIONS

The *Journal of Intergenerational Relationships*, founded in 2003 and published by the Hayworth Press, is a peer-reviewed journal with articles on intergenerational programs, policy, and research. The journal frequently features articles that provide an international perspective on cross-age programs and relationships. To see tables of contents, order articles, and receive subscription information, visit www.haworthpress.com/store/product.asp?sku=J194.

Intergenerational Resource List by Abigail Lawrence-Jacobson, Ph.D. This comprehensive annotated bibliography lists more than 1,200 references on intergenerational topics. The bibliography is organized by sections so that you can find background materials of interest to you. Available on line at http://intergenerational.cas.psu.edu/IGResourceList.

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Chapter 2

What Do Intergenerational Programs Look Like?

Mobilizing younger and older people to serve as resources to each other and to their communities is one strategy for meeting some of the problems facing individuals, families, and communities today. Intergenerational programs not only address a variety of specific needs, they also foster enriching relationships across generations.

There is enormous variety in the types of intergenerational programs that exist, the forms they take, and the needs they meet. Despite the inherent flexibility of the intergenerational approach, there are certain characteristics that successful intergenerational programs share. These essential elements are a good place to start when envisioning a new program or working to improve an existing one.

This chapter also lays out a set of dimensions that define how different intergenerational programs may be structured according to the intentions and needs of program planners. Thinking about these factors will help you begin to define your project and understand how it compares with other intergenerational programs.

Essential Elements of Intergenerational Programs

While many activities can be planned that bring together older adults and young people, programs that are most effective at achieving their goals and are most fulfilling to participants include five essential elements:

- *Roles* that are clear and meaningful for all participants. Though younger and older people may have different capabilities and levels of experience, they all have something to contribute. Roles should be developed that are connected to the overall mission of your organization and build on existing skills or provide opportunities to learn new ones.

- *Relationships* that are intentionally fostered between youth and older adults. Programs are about more than service. They should help participants establish personal bonds and feelings of affection, support, trust, and companionship.

- *Reciprocity* between older adults and youth. Participants in successful intergenerational programs have the experience of both giving to and receiving from others outside their age group.

- *Recognition* of the contributions made by all generations. Ongoing acknowledgment of each program participant and opportunities to foster respect and appreciation across ages are important for long-term retention.

- *Responsiveness* to community needs. Intergenerational programs that are developed to address clearly identified needs have a greater likelihood of sustainability.

Ensuring that programs include all of these elements requires thorough planning and close attention to detail. The basic steps in planning and implementation are laid out in the chapters ahead.

What Forms Do Programs Take?

It is helpful to think about program "form" in terms of five dimensions: Focus, Direction of Service, Level of Engagement, Degree of Innovation, and Scope.

Focus

Focus refers to the area of interest or concern that a program addresses. Chapter 1 described a variety of social issues, any one of which could be the focus of your program. Your program should relate to your organization's mission. However, you should also use the data collected through an assessment of your community's needs and resources (discussed in Chapter 3) to guide your decision-making. Keep in mind that the most successful programs are those that respond to interests or needs identified by the community and for which there are adequate resources.

Direction of Service

Most intergenerational programs harness the skills of one age group to meet the needs of another or engage mixed-age groups to provide service to the community. When considering the direction of service, four options are typically described (Lyons, 1992, p. 10):

- *Young serving old.* Examples include elementary school children visiting nursing home residents, high school students doing chores for homebound elderly people, and college students tutoring elders to improve their language and literacy skills.

- *Old serving young.* Older people can mentor teens at risk of drug use, counsel college students who are exploring options for future professions, provide child care, and lend support to vulnerable families.

- *Old and young serving together.* Generations can work together to educate communities about public health issues, coordinate voter registration drives, support vulnerable populations (such as homeless people), and engage in environmental projects.

- *Joint dependent care.* When children and elders with needs come together to receive services, this is considered joint dependent care. Two examples are shared-site day care programs for preschool children and frail elders, and programs that provide support to families in which grandparents are raising grandchildren.

Regardless of the direction of service, intergenerational programs that are most effective are reciprocal: both older and younger partners learn and gain from one another. When thinking about the direction of service, you need to contemplate what roles would be most fulfilling, mutually satisfying, and helpful to participants of all ages. Consider finding opportunities for people who typically receive services to engage in a "giving" role. For example, residents of a nursing home might serve as mentors to teen parents, or teens with autism might deliver meals to homebound elders.

I know they didn't have a childhood as good as mine. Since I started going there, I have been acting better. And every time I do something wrong, I think about them and what they went through, and I look back and I see what I did wrong.
—Sixth grade student in an oral history nursing home project

Level of Engagement

There is substantial variation in the degree to which programs build relationships between older adults and young people. In general, one-shot intergenerational events are less likely to produce the long-lasting relationships developed during longer, more intensive programs. However, even long-term programming cannot guarantee that all participants will connect: Creating an environment that supports relationship-building requires extensive and thoughtful planning.

In his Scale of Intergenerational Engagement, presented in Table 2.1, Kaplan (2004) presents one way to think about how relationships between program participants may vary depending on the program model. He uses a scale in which Level 1 is the lowest amount of contact between youth and older adults, and Level 7 is the highest.

TABLE 2.1

Kaplan's Scale of Intergenerational Engagement

Level 1: Participants learn about another age group but have no individual contact, such as during a classroom lesson on aging or a senior center presentation about teens.

Level 2: Old and young experience contact at a distance, such as when a young person and an older adult become pen pals.

Level 3: Generations have face-to-face contact but only for one meeting, for example, if students and senior center members went on a field trip together.

Level 4: Activities are held annually or periodically. Despite their infrequency, these events symbolize openness and unity between generations and may influence youth and older adults to become more involved in ongoing activities.

Level 5: Older adults and youth jointly participate in regular activities over a fixed period of time, such as a school-based service-learning project that meets regularly throughout the school year. These fixed-length projects are among the most popular type of intergenerational program.

Level 6: Programs are ongoing, structured, and well-integrated into an organization's operations, such as with Experience Corps, in which teams of older tutors are regular fixtures in the program's schools. Institutions are more likely to integrate ongoing programs after they've had success with demonstration projects.

Level 7: Intergenerational contact is natural and ongoing, as exemplified by an age-integrated community or shared site. For example, Grandfamilies in the Boston community offers housing to multiple generations in order to provide support to grandparents who are caring for grandchildren or to involve non-related older adults in the ongoing care of children at risk.

Programs that involve lower levels of engagement are useful for piquing interest between the generations and laying the groundwork for partnerships. However, research has shown that programs involving higher levels of contact (i.e., Level 5 and higher) have greater potential to do the following:

- Change participants' attitudes toward other age groups

- Build a sense of community

- Enhance participants' self-esteem

- Establish nurturing and intimate relationships between unrelated individuals (Kaplan, 2001, p. 14)

As Kaplan puts it, "A relationship cannot flourish without interaction opportunities that enable people to get to know and trust each other. It is questionable to speak of meeting people's social and emotional needs through providing them with 'abbreviated' opportunities for intergenerational interaction" (2001, p. 13). However, keep in mind that activities involving higher levels of intergenerational engagement usually require more resources for both planning and implementation.

Degree of Innovation

With hundreds of intergenerational programs in place, there is a good chance that some version of the program you want to develop already exists somewhere else. You can replicate a program designed by others, adapt an existing model, or integrate an intergenerational approach into an existing service. Each approach is described below.

Replication

Replication requires that you implement a program in strict accordance with guidelines laid out by the program's developers. Many programs sell or distribute guides and materials to facilitate replication. Organizations that copyright or trademark their program name and materials may also require users to adhere to certain conditions prior to using their name, such as completing a certain level of training.

Replication of small programs can be fairly simple. Replication of programs on a larger scale may be more complicated. For example, some national programs, such as Experience Corps, Family Friends, and SHINE, have a discrete number of replication sites that they usually identify through an application process. These sites receive technical assistance and training, program materials, and funding from a lead agency to support program expenses. In exchange, the replication sites are expected to follow program guidelines, submit reports, and participate in centralized evaluations.

ALEX HARRIS
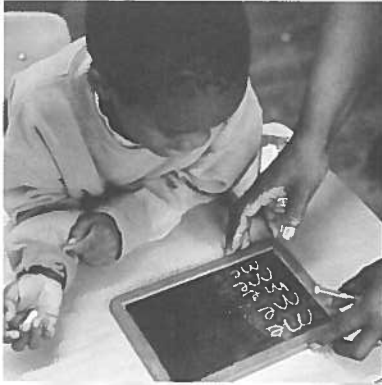
Adaptation

Adaptation means that you alter the original program model to achieve a better "fit" with your community or organization. In many cases, program adaptation allows you to tailor a program to meet your needs and thus maximize your program's effectiveness. For example, Homefriends is an adaptation of Family Friends, in which older adults work intensively with families who have a child with special needs. In Homefriends, volunteers work with families at risk of child abuse or neglect. Volunteers in both programs provide respite and emotional support, but Homefriends volunteers receive additional training in parenting and dealing with domestic violence.

Adaptation may also be driven by resource constraints—when you simply don't have the money, personnel, space, etc. to do everything. If this is the case, be careful about what you leave out. All programs have certain "core elements" that must be maintained without alteration to ensure program effectiveness.

Integration

Integration refers to the process of incorporating an intergenerational approach into an existing service. For example, a school in a rural area typically trains parents to provide classroom-based tutoring but is unable to recruit enough parents to help all of the students in need. To improve its tutoring capacity, the school recruits older adults to fill the role. Transportation is provided via an unused school bus, and tutors are invited to accompany students to lunch—thus providing additional lunchtime supervision. Another example of integration might be a Meals on Wheels program that expands its volunteer base to include mobile high school seniors who need to fulfill a community service requirement to graduate.

Starting from Scratch

Sometimes your idea has never been tried before. Even though you may create a totally new program, be sure to learn what you can from existing programs. There are many resources available to help you conceptualize and implement your program, some of which are listed in the Resources section of this chapter.

Your decision to replicate, adapt, integrate, or create an intergenerational program will be based on a variety of factors, such as funders' requirements, resources available, and prior experience with intergenerational programming. Table 2.2 summarizes the advantages and disadvantages of each approach.

TABLE 2.2
Comparing Degrees of Innovation

DEGREE OF INNOVATION	ADVANTAGES	DISADVANTAGES
Replication	Community buy-in may be easier The project has already been recognized for its success Materials and tools are provided Some existing programs may help fund replication Replication of successful models is attractive to some funders	There is little room for flexibility Funding may be competitive or infrequent Required trainings and program materials may be expensive The program, as is, may not be culturally appropriate
Adaptation	Modified programs may better address identified needs and social issues Programs can be adapted so that they are culturally appropriate Modified programs may be more affordable to implement	Poor adaptation may compromise program effectiveness There is no obvious funding stream
Integration	There is no need to build new infrastructure It maximizes use of existing resources	You must have an existing infrastructure It may be difficult to overcome resistance to change
Starting from Scratch	It presents an exciting opportunity to try something new and be creative Many resources are available to provide guidance	You may be re-inventing the wheel It may be harder to justify funding and/or use of resources

Scope

"Scope" is typically described in terms of three variables: the number of participants, the size and number of communities involved, and program length or duration. Intergenerational programs vary considerably in scope. Some programs, such as short-term, school-based service-learning projects, are very contained. Others, such as multi-year, multi-site mentoring programs, are more ambitious.

Having a sense of how big your program will be can help you determine the resources you will need to get it up and running and to sustain it over time. When thinking about the scope of your program, consider the following:

- How many people do you want to reach?
- How many communities do you want to involve?
- How long will the program run?

Each question is discussed below.

How Many People Do You Want to Reach?

In some cases, this decision is straightforward. Let's say, for example, that one elementary school teacher expresses an interest in having her class participate in an oral history project with elders from a nearby senior center. Knowing that a one-to-one or two-to-one child-to-adult ratio is ideal, you will want to recruit 10 to 20 seniors to match the 20 students in the classroom. Over time, you may want to involve additional classrooms and more adults. But for right now, the scope of your program is small. In contrast, Experience Corp's Philadelphia site had more than 250 volunteers tutoring more than 1,600 children at schools throughout the city in school year 2003–04. Running the program at this scale required six full-time and eight part-time staff.

You want to serve a large enough group so that you make a difference in your community and so that the efforts that you put forward have adequate return. However, you also want to serve a manageable and achievable number of people.

TIPS ON CHOOSING THE NUMBER OF PARTICIPANTS

There is no magical number of program participants. Experience suggests that programs requiring a higher level of engagement, such as mentoring programs, are more effective when they have a critical mass of people (a minimum of 8 to 10 representatives from each age group). This size allows group members to build on one another's energies.

Realize that it takes time for programs to grow—you might want to start small and grow from there.

How Many Communities Do You Want to Involve?

Programs can be neighborhood-based, serve large segments of a municipality, or include individuals from multiple counties or states. When defining your geographic area, consider both the benefits and drawbacks of working with small versus large catchment areas. Community stakeholders may be more likely to support a localized effort, and managing program logistics is more straightforward. However, programs that involve multiple communities may be more attractive to state and national funders, or allow you to tap into existing supports. Remember, you can always start small, then add communities to your program after you have tested the waters.

How Long Will the Program Run?

Programs can also vary considerably in terms of duration. Sometimes an intergenerational program is a single event. More often, programs extend over a set amount of time, such as a term or school year. Programs that are designed to produce strong and lasting relationships among participants sometimes last even longer. For example, mentoring relationships should last for at least one year to be of help to the child. When establishing a time frame, consider how long it will take to see and sustain results. Also, keep in mind that longer programs tend to require a greater investment of resources, both in the planning and the implementation stages.

In Closing

This chapter has provided you with a glimpse of the many ways that intergenerational strategies can be used to address community needs, and the multiple forms that such programs can take. Use this information as a springboard for discussions within your organization, and with future collaborators, on the kinds of programs that will work best in your environment and will maximize the resources available to you.

IN THE **CD-ROM Toolbox**

• **Links to Chapter 2 Resources**

Resources

Generations Together at the University of Pittsburgh publishes program and training materials on a variety of topics, including materials for integrating older adult workers into child day care settings. Visit them online at www.gt.pitt.edu.

Generations United's Web site provides a thorough list of materials related to adapting or replicating intergenerational programs at www.gu.org.

National Service-Learning Clearinghouse provides information on using intergenerational programs to meet schools' service-learning requirements. Visit the Clearinghouse at www.servicelearning.org/.

Penn State Intergenerational Program's Web site provides extensive information about and tools for planning intergenerational programs: intergenerational.cas.psu.edu/.

Temple University's *Center for Intergenerational Learning* has free downloadable resources on program planning and evaluation reports. Replication manuals, training materials, and videos on a wide variety of intergenerational programs are available for purchase. The Center provides individualized training and technical assistance to organizations that want to start or strengthen intergenerational programs or implement strategies to engage older adults as volunteers. Visit the Center at www.TempleCIL.org.

Under One Roof: A Guide to Starting and Strengthening Intergenerational Shared Site Programs. Generations United. (March 2005). This how-to guide is for individuals and groups who are, or will be, involved in the development of intergenerational shared sites. This guide, authored by a national group of experts from various disciplines with practical knowledge on intergenerational shared sites, provides general information on program development, highlights tips from different programs, shares relevant resources, and summarizes varied perspectives on shared sites. Go to www.gu.org to order a hard copy or download the 118 page guide for free.

Open Doors, Open Hearts: A Guide to Bringing Long-Term Care Residents and Young People Together. Center for Intergenerational Learning. (2002) This easy-to-read practical 118 page guide designed to help long-term care facilities, schools and youth organizations form partnerships and create intergenerational programs or enhance existing programs, with accompanying video. Available from the Temple University Center for Intergenerational Learning, www.templeCIL.org.

Across Ages Program Development and Training Manual. Center for Intergenerational Learning. This manual provides step-by-step direction for developing each component of Across Ages: intergenerational mentoring; community service; a life skill program; and family activities. Although designed as a comprehensive multi-intervention project, each component can be implemented separately or in combination. Program forms, evaluation materials and training designs are included. (84 pages of text; 56 pages of training tips and forms). Available from the Temple University Center for Intergenerational Learning, www.templeCIL.org.

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Assessing Your Needs and Resources

I heard that "friendly visiting programs" with the elderly were a good way to introduce students to community service. I hooked up with a senior housing complex up the street from school. We trained the students to visit the elderly in their apartments. But when we were ready to start the program, none of the seniors signed up to have visitors. I didn't realize how active the seniors were; they like to get out of the house and weren't interested in waiting around for a student. If we had learned more about the seniors before we started the program, we would have developed a different project based on their interests.

—High school teacher

ntergenerational programs are always developed with the best intentions. Yet all too often, program planners initiate projects based on "gut" feelings or because they like a program idea, rather than in response to a documented need. In doing so, they run the risk of creating programs that miss the mark—people aren't interested in attending, volunteers can't be recruited, or the speculated "need" is not as pressing as predicted.

Finding out about the people who will participate in your program, as well as the setting in which it will be implemented, will increase your chances for program success. The extent of your assessment efforts will vary, based on the size of your program and the resources available. Depending on the scope of your program, you may be well-served by having an experienced researcher help you with all or part of your assessment. However, even people without research experience can use the techniques described in this chapter to collect important information that can guide good program design.

WHY CONDUCT AN ASSESSMENT?

You may not be sure whether a formal needs assessment of the community that your program will target is worth the time and resources it would take to gather and analyze the necessary data. However, a thorough assessment is the foundation of a strong program. With intergenerational programs, assessment is particularly important in ensuring that there is a complementary fit between the needs and resources of different age groups. And there are other good reasons for conducting an assessment:

- *To distinguish between real and perceived needs.* Intergenerational programs are most effective when they respond to real problems. Assessment can reveal the nature and extent of problems in your community. It can also help you prioritize the identified needs.

- *To identify available resources.* Assessment can yield rich information about the programs and people present in your community that can help you address identified problems.

- *To mobilize the community around intergenerational issues.* Intergenerational programs both drive—and are driven by—a commitment to look at communities across ages and issues. Carefully presented data can be used to heighten awareness of the need for intergenerational strategies and to highlight ways for organizations to work together.

- *To identify potential barriers to intergenerational programs.* For example, assessment may reveal transportation issues that you would want to address before launching a new program.

- *To identify potential partners.* The community members you meet and connect with throughout the assessment process may end up being future collaborators. The more you learn about one another, the easier it will be to identify areas where you may be able to work together.

Focus groups we did with older people in our community revealed that those who didn't volunteer would in fact do so if they had a selection of volunteer opportunities to choose from and there was flexible scheduling. So we "repackaged" our volunteer program to attract people who were interested in just putting their toe in the water.
—Program director

🐦 *To achieve "buy in."* When the public understands that you have developed a program in response to their feedback, they will be excited about participating in and helping to market your program.

🐦 *To secure funding.* Most grant applications require organizations to document evidence of community need and to describe how their program will meet this need. This information can come straight out of your assessment.

🐦 *To provide a baseline for evaluation.* By comparing the data you collect during the assessment with program evaluation data, you will deepen your understanding of the degree to which your program worked or didn't work and how it might be improved.

What Does an Assessment Entail?

For the purposes of planning an intergenerational program, an assessment is a process by which planners come to understand their targeted community, the needs that should be addressed, and the assets that community members of all ages can bring to any new venture.

Community

Community is most often defined by geography—a housing development, a neighborhood, a town, a state, a country. Community may also relate to characteristics that people have in common, such as grandparents raising grandchildren, students at a state university, retired scientists, and persons with mental illness. The community or communities that you assess will be determined by the mission of your organization and by what is driving you to explore the use of intergenerational approaches for meeting your goals.

Before developing your assessment, think about how large a geographic area you want to target as well as how much information you want to collect about specific populations.

Needs

Needs are the problems or issues facing your community. They can be defined as the "gap between what a situation is and what it should be" (KU Work Group on Health Promotion and Community Development, 2000). Communities with the same problems may experience their problems with different levels of intensity. Needs assessments provide information about which needs are of greatest concern in a community. Examples of needs include inadequate transportation, high rates of domestic violence and/or teenage pregnancy, and insufficient day care.

A needs assessment can help you decide which specific neighborhood in a town can most benefit from an intergenerational intervention. It can also reveal previously unknown concerns that may become a priority to address.

Assets

A community's assets fall into three major categories: capacities of individuals, strengths of voluntary associations, and resources of institutions. Examples of assets might include older residents of a retirement community interested in finding meaningful ways to spend their time, members of a high school Environmental Club who want to make their community a cleaner place to live, and a senior center with available space for a day care center.

A resource assessment can help you gauge your community's capacity to meet identified needs. For example, perhaps your needs assessment reveals large numbers of older immigrants in need of help navigating the health care system. A resource assessment might reveal a pool of college students in health-related studies who are available and willing to provide this service. By looking at both the needs and resources of your community, you will develop a more complete understanding of how your community functions, and be better able to help residents—both young and old—find ways to work together and support one another.

Assessments, Small and Large

In a predominantly Hispanic neighborhood in Arizona, a group of young people conducted door-to-door interviews with older residents to assess their needs and talents. This process was part of the exchange that was necessary to engage older people in a community planning process. Planners learned that face-to-face interviews were much more effective than surveys for building trust with and gathering information from limited-English-speaking elders. Results of the assessment were included in a proposal that resulted in a three-year grant to support local individuals and families across the lifespan.

Driven by concerns about the future dramatic growth in the aging population, more than 150 Charlottesville, Virginia-area organizations embarked on the process of developing a long-range community plan to help local residents, the local government, and the for-profit, nonprofit, and faith-based sectors identify ways to work together to create "an active, caring and welcoming community that promotes respect, diversity, and inclusion of all ages and cultures" (Jefferson Area Board for Aging, 2003, p. 3). A comprehensive assessment completed for the plan included an evaluation of youth perspectives. During student forums, surveys, and discussions, planners solicited input from young people about their interests and concerns and about how these might interface with those of older residents. This input resulted in a chapter within the 2020 Plan titled "Strengthening Intergenerational Connections," that was written with input from two high school students who were motivated by their participation in the assessment process.

How Do You Conduct an Assessment?

Pre-program assessment can be conceptualized as a seven-step process, described below.

> **INTERGENERATIONAL NEEDS/ASSETS ASSESSMENT AT A GLANCE**
> **STEP 1:** Clarify your purpose
> **STEP 2:** Review existing information
> **STEP 3:** Identify information gaps
> **STEP 4:** Decide who you want to talk to
> **STEP 5:** Develop your plan for data collection
> **STEP 6:** Proceed with data collection
> **STEP 7:** See what the data tell you

Step 1: Clarify Your Purpose

Before beginning your assessment, determine what it is you want to find out. Are you interested in learning more about the transportation needs of older adults? The tutoring needs of students? The number of organizations that provide respite services? Are you interested in the needs of particular populations—such as older immigrants or children raised by grandparents—or of obtaining a general "snapshot" of your community?

Once you have a general idea of what you want to find out, you can develop a list of overarching questions that you want answered. Questions should be closely related to your topic of interest, but not so narrow in scope that you miss seeing the big picture. The questions below are quite general; as you complete the first stages of your assessment, you may want to develop questions that are more focused.

Questions for Pre-Program Assessment

- What are the most critical needs of youth, families, and/or older adults in this community?
- What services/programs exist to meet these needs?
- Are there gaps in these services? If so, what are they?
- What other existing community resources (e.g., agencies, universities, networks of friends or businesses) can be tapped to fill these gaps?
- How can youth and older adults be enlisted to address the identified needs?
- Are there currently any intergenerational programs in your community? If so, who do they target and what are their goals?

Step 2: Review Existing Information

Before collecting new data, take the time to review existing data that have already been collected by others. Many local agencies collect data and maintain records to better understand their clientele and to document and evaluate the services the agencies provide. State and federal departments also routinely conduct assessments of the well-being of their residents and the general population. Finding out what information has already been collected by others will put you in contact with potential partners, prevent duplication of efforts, and maximize limited time and resources.

Most of the information you collect will appear in one of two forms: as a report or as indicator data.

Reports

Reports typically present and summarize data on a specific topic and make recommendations for action. Obtaining quality reports on national issues is fairly easy; most can be downloaded from the Internet at no cost or purchased for a nominal fee.

Finding reliable reports on local or state concerns may be more difficult. Here are some suggestions for moving forward:

- Start by contacting organizations and agencies that you know provide a particular service, and find out what kinds of information they collect.

- Scour the Web sites of local organizations, which may list publications that you can purchase or download.

- If you live in a community with colleges and/or universities, contact faculty and graduate students who may be doing research on issues of interest to you.

When reviewing reports, note the perspective of the author or organization presenting the data. Their biases may impact what they include in the report, how they present their data, and what conclusions they draw from them.

Indicators

Indicators are numeric data that are tracked over time. Indicator data reveal characteristics of a population (e.g., attendance rates for middle school students), a community (e.g., the number of senior centers within city limits), or a program (e.g., the number of older adults who receive food stamps).

In recent years, the number and types of indicators available on the Internet has increased. When reviewing indicator data, however, note that the quality of reporting may be uneven between agencies or across communities.
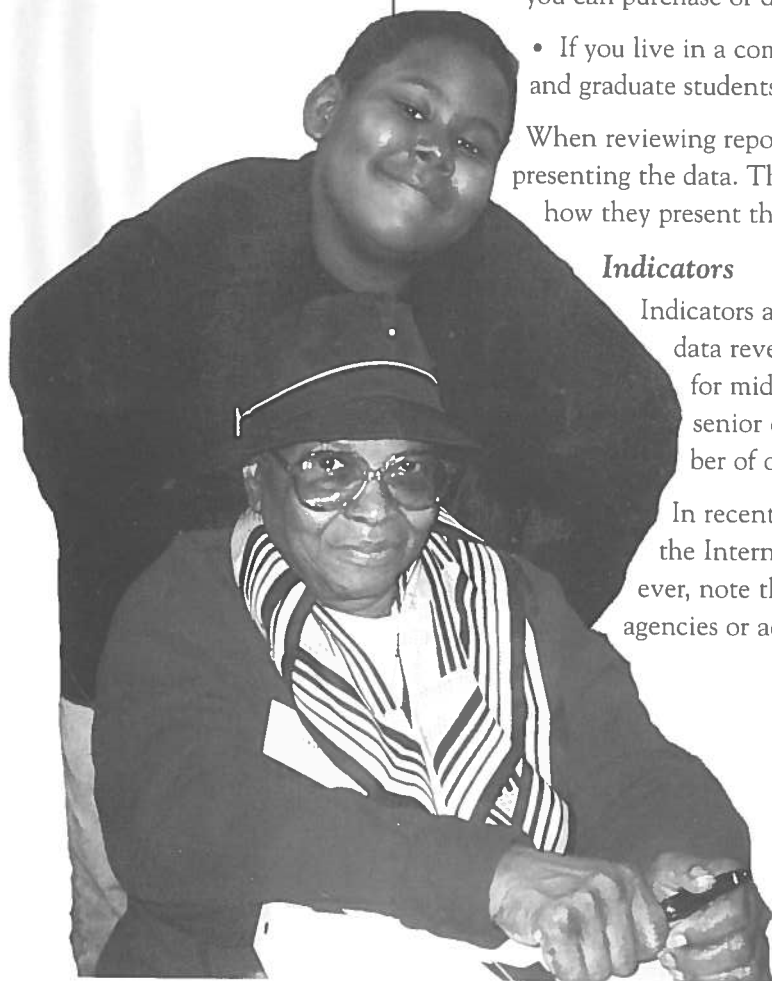
Client Records

You know in your heart that your clients are not receiving a particular service but do you have the data to prove it? If your organization's client records are automated, then you can easily produce the evidence you are looking for. However, if your records are not computerized, you will need to review client records one by one. How many records you read will depend on the size of your client base (i.e., if you have a large group, you will only need to review a random sample), staff availability, and your estimate of how frequently the problem is occurring.

Step 3: Identify Information Gaps

Once you have collected information from multiple sources at the local, state, and national levels, you may find that you have enough information to shape your intergenerational program. You may also discover that some of your original research questions remain unanswered. For example, you may have identified schools with low reading scores, but you were unable to find out if these schools have any programs designed specifically to bolster reading ability. Review the information you have in hand, and identify any gaps in your understanding of community needs and resources. This will help you determine what information you will need to generate yourself.

Step 4: Decide Who You Want to Talk To

Again, where you go for information will largely be determined by your assessment questions. However, keep in mind that talking to a variety of organizations and individuals will provide a more complete picture of your community than contacting only a few. Community data can be collected from the following sources:

- *Associations*. These are groups of people who have come together to solve problems or share common interests, such as religious congregations, civic associations, neighborhood clubs, the "regular" patrons of the neighborhood café, or even street gangs. Associations often have resources they can share with your project, such as volunteers, expertise, or supplies. An assessment of associations may also reveal unanticipated challenges to your endeavor, such as turf conflicts between groups or philosophical differences among members.

- *Institutions*. These are organizations with a more formal structure, such as police departments, child care centers, schools, businesses, government agencies, and social service organizations. If your target "community" and project are very specific, you won't need to assess all of the institutions in your area. However, if you are planning a large-scale initiative designed to address significant problems, it is important that you know about the primary institutions in your community and the potential challenges to working with them.

- *Individuals*. Most assessments focus on potential clients—the individuals or groups who will be receiving services. Yet, it is also important to assess potential volunteers. Most intergenerational programs depend on the efforts of volunteers. If you know what community members are interested in, you can craft volunteer opportunities that are both appealing and rewarding.

Step 5: Develop Your Plan for Data Collection

The most compelling assessments are based on information from multiple sources, and include both quantitative (numeric) and qualitative (narrative) data. Since it is impossible to do everything, you will need to look closely at the pros and cons of varied data collection methods in order to develop a plan that will provide you with the information you need. Make sure that you tailor your methods to the specific population or community you are assessing. Do most people in your target area have telephones? Are people more comfortable speaking than writing? Do cultural norms inhibit the sharing of personal information in groups?

Some common data collection options are interviews, focus groups, surveys, and mapping, each of which is described below.

Key Informant Interviews

Key informants are people in the community with expertise on the topic(s) you are interested in assessing. Key informant interviews are guided conversations, conducted in person or by phone, that encourage the respondent to fully explore all aspects of an issue. When selecting key informants, choose individuals with diverse perspectives (e.g., formal community leaders, direct care workers, potential program participants, and potential volunteers). In many ethnic communities, there are also informal leaders who can provide the most insight into the needs and resources of residents. Ask the people you interview to suggest other informants who can provide different perspectives.

Topics covered during a key informant interview might include the following:

- Needs and capacities of a given population
- Potential receptiveness to a program idea
- Potential challenges to implementation
- Recommendations for overcoming challenges
- Cultural norms and values that could impact the effectiveness of an intervention
- Suggestions for community partners

It is important to be well-prepared for key informant interviews; the more you know about your informant and the topic on the table, the meatier the conversation. Write out specific questions in advance. Sometimes the people you interview will bring up unexpected issues that you may be interested in exploring. Other times, you will want to keep them on track. Remember, the relationships you develop as a result of these interviews may continue to be valuable over the course of the project.

Focus Groups

Focus groups are semi-structured discussions designed to elicit opinions from a group of people. Ideally, focus groups create synergy—by working through issues together, participants are better able to articulate their ideas. To be most productive, groups should consist of 8–10 participants who are alike in some fundamental ways (e.g., residents of a long-term care facility, college students looking for volunteer opportunities). A skilled facilitator guides the group through a prepared set of questions, only deviating from the script when necessary. Responses are usually audio- or video-taped, then transcribed and analyzed. If this is not possible, make sure that you have a recorder who takes detailed notes. A frequent challenge to conducting focus groups is recruiting participants. To boost attendance, consider providing incentives, such as stipends or refreshments, child care, and transportation. Also, make sure to schedule the group at a convenient time.

Surveys

Surveying is one of the most common methods of collecting assessment and evaluation data. Surveys may consist of closed-ended questions (e.g., yes/no, multiple choice), open-ended questions (e.g., What do you like best about going to the Senior Center?), or a combination of the two. Closed-ended questions are helpful because they can be counted or measured. Open-ended questions can elucidate themes and may produce unexpected information, which can be particularly valuable when you are first learning about an issue. Surveying can be an effective tool for collecting "pilot data"—a "snapshot" of what you want to learn from a sample of the people you want to learn about. It's important to select a representative sample of the population so that you can generalize your results to the larger community. Be careful with the language you use and the literacy level of the survey. Try out the survey with a small sample to see if it is developmentally and culturally appropriate.

Mapping

Mapping involves laying out—either visually, in a map or chart, or in writing—the institutional resources available in a community. To map your community, begin by listing all existing associations and organizations (e.g., houses of worship, schools, senior centers, social service organizations, long-term care facilities, hospitals, institutes of higher learning). These can usually be found in the phone book or from "central offices," such as county offices or school boards. Then reorganize this information by zip code or neighborhood. The resulting "map" will show you who is doing what, as well as what is not getting done. It can also be used by organizations to identify potential partners in their own neighborhoods. Geographic information system (GIS) software can help you with this process. (For more information about GIS, see the Resources section of this chapter.)

There are many other data collection methods you might try. Innovative, participatory methods include teams of youth and older adults going door to door interviewing neighbors, house meetings, writing projects, murals, poetry workshops, and community dialogues.

TABLE 3.1

Comparing Data Collection Methods

DATA SOURCE	ADVANTAGES	DISADVANTAGES
Available data	Is low-cost Does not require new data collection from individuals Can be highly accurate Is valid Allows for historical comparisons and trend analysis Provides an excellent baseline for comparisons	May be difficult to access Is often incomplete or out of date May not make it possible to do year-to-year comparisons because of changing rules for record-keeping May not provide information on how records were compiled Rarely provides information on values or attitudes May provide an incomplete picture of what is going on
Client records	Is low-cost Does not require new data collection from individuals Provides an opportunity to check out gut feelings	Provides limited information—can only summarize information that has already been collected Gives rise to confidentiality concerns that must be addressed Is limited to current clients
Surveys	Provides moderately accurate information Can be well-designed, simple, and clear Allows rapid data collection Can be reliable and valid if using a previously tested instrument the way it was designed, with appropriate methodology	Only taps willing and reachable respondents Is highly dependent, in terms of accuracy, on who and how many people are sampled and on survey design Requires resources for survey design and distribution, as well as data entry and analysis
Key informant interviews	Is low cost Allows rapid data collection Offers the possibility of exploring many topics in depth Offers access to key informants, who may lead to other informants and to other sources of relevant information	Can be time-consuming to set up interviews Produces limited quantitative data Is less accurate than other research methods Requires carefully trained interviewers Results in data that must be analyzed, which may be labor-intensive
Focus groups	Is more participant-centered, as participants define what is important Provides a chance for moderators to probe for more information Allows rapid data collection	Can be time-consuming to assemble group Produces limited quantitative data Requires carefully trained facilitators Allows less control over process than individual interviews do May be difficult to collect confidential information Analysis and summary are labor intensive
Mapping	Results in directories that can be used by the community Does not require research, training, or skill to compile data Provides a quick overview of assets Fosters the formation of partnerships	Can be time-consuming to assemble data Needs constant updating Results in directories that can become outdated quickly Provides little information about needs Provides only general information

Step 6: Proceed with Data Collection

Collecting data—whatever your method—is more likely to go smoothly if you do the following:

- *Respect participants' confidentiality.* To protect an individual's identity, make sure that everyone involved in the data collection process has a shared definition of what "confidentiality" means. A good working definition is that only those who collect and analyze the data will have access to individual identifiers, and that this information will not be shared with others.

- *Set a time frame.* Evaluators are often frustrated by the challenge of collecting enough data. However, at some point you will have to stop collecting and start analyzing what you've got.

- *Be consistent.* If more than one person is collecting data, train them together on how to use the data collection tool.

- *Circumvent disaster.* Save and back up all computer files. This is especially critical if there is no paper copy of your information.

Step 7: See What the Data Tell You

The final, and perhaps most important, step is to take all of the information you have collected and make sense of it. What is it telling you? Where are the gaps? How can you use the information to establish priorities, and then select and refine intergenerational strategies and programs based on those priorities?

Organize

To answer these questions, you will first need to organize the data in a way that is meaningful not only to those of you who have been immersed in data collection, but also to those who might be new to the process. You may choose to sort your findings by type of indicator (e.g., elder safety, child health), by population (e.g., elder immigrants, middle school students), or by data source (e.g., Department of Education, Office of Disabilities). With qualitative data, it is important to accurately reflect themes that emerge in group or individual discussions. Ethnographic software programs that organize qualitative data can be helpful; however, these are time-consuming to learn and to use and are most effectively utilized by experienced researchers. A low-tech approach is to use a paper transcript. List key words for participants' quotes in the transcript's margin, then count the number of themes that arise in response to a question and the frequency with which speakers agree and disagree with one another.

Analyze

Once your data are organized according to the categories that are most meaningful for your project, you are ready to analyze them and see what conclusions they point toward.

Go back to the list of reasons to do an assessment described at the beginning of this chapter and to the list of overarching questions you developed in Step 1. Now, in the context of these questions, document those findings that seem particularly compelling. Critically review the data you've collected, checking for information that seems illogical or inconsistent. Compare information obtained from different sources. Consider, for example, how client survey data relate to what you learned from key informants. How can their responses, taken together, help you shape your future project? Try to be as objective as possible and allow the data to contradict your preconceived ideas. By reviewing your data and being objective, you increase the likelihood that the intergenerational strategy you choose truly reflects the needs and resources identified by your assessment—rather than the "problem of the moment" or someone's pet concern.

In Closing

With pre-program assessment, you will be better equipped to identify priorities, as well as resources. Then think about how to describe the issues that have emerged from the data so that they are clearly stated, fully justified, and likely to attract support throughout your organization or community. Once people understand and buy in to your priorities, you can move forward with program planning.

IN THE **CD-ROM Toolbox**

- **Gifts I Can Give My Community**
- **Focus Group Topic Guide for Older Adults**
- **Links to Chapter 3 Resources**

Resources

AARP has many on-line resources that provide information about a variety of topics affecting people 50 and older. AARP also houses the *AgeLine®* *Database*, a search engine for research, professional and lay literature on aging topics. www.AARP.org.

The Administration on Aging, a federal agency that is part of the Department of Health and Human Services, provides extensive statistical data, easy-to-read fact sheets, and narrative reports on a wide variety of issues affecting older people. Among the dozens of topics covered, you can find reports on preventive health and specific health conditions, financial issues, housing, volunteerism, and caregiving. Materials can be easily downloaded and printed from the agency's Web site, www.aoa.gov.

The Asset-Based Community Development Institute (ABCD) at Northwestern University has published and sells workbooks and guides to asset-based assessment. ABCD's workbooks are geared to specific topics, such as assessment of rural communities, businesses, and associations. A copy of the "Capacity Inventory," developed by John Kretzmann and John L. McKnight to assess individuals' assets, can be printed for free from ABCD's Web site, www.northwestern.edu/ipr/abcd.html.

The Child Welfare League of America has extensive on-line data and reports on the needs of children, youth and families. www.cwla.org.

The Children's Defense Fund (CDF) is a private organization that tracks and conducts advocacy on national issues affecting children. Issues covered in downloadable reports include child care, child health, violence prevention, child poverty and child welfare, and mental health. CDF also publishes an annual yearbook that summarizes many national issues affecting children. To download or purchase materials or to see current demographic data, visit the CDF Web site at www.childrensdefense.org/.

The Department of Elder Affairs for the State of Florida has developed tools to help communities asses if they are "elder ready." You can download and print "report card" forms to help you determine if your community is "well elder ready," "rural elder ready," and "frail elder ready." Visit the department's Web site at http://elderaffairs.state.fl.us/doea.

The Federal Interagency Forum on Aging Related Statistics' publication *Older Americans 2004: Key Indicators of Well-Being* includes data on demographics, economics, health status, health risks and behaviors, and health care. This valuable publication can be downloaded at http://www.agingstats.gov/chartbook2004/default.htm.

Geographic information system (GIS) software can help you map a community. You enter the data, then GIS gives you a visual map of information for that geographic area. For more information about GIS, go to www.GIS.com.

Healthy People 2010, a federal health initiative, has selected leading health indicators that need improvement and has developed specific objectives to be achieved through public health efforts over the first decade of the 21st century. These objectives can help you determine what to measure in your own community. For a detailed description of the objectives, go to the "Publications" section of the Web site (www.health.gov/healthypeople/) and select "Healthy People in Healthy Communities: A Community Planning Guide Using Healthy People 2010." Appendices A and B contain the objectives, and the rest of the Web site offers interesting information on health.

The National Center for Health Statistics is a clearinghouse for health data in the United States. The "Fast Stats A to Z" section of the Web site (www.cdc.gov/nchs/) presents brief downloadable reports on topics ranging from "Accidents," "AIDS/HIV," and "Alabama" to "Work-loss Days" and "Wyoming." You can also find in-depth reports on health, download databases, and generate your own reports on health.

The *Search Institute* has identified 40 critical factors that contribute to young people's healthy growth and development. When drawn together, these assets offer a set of benchmarks for positive child and adolescent development. You can purchase the Institute's pre-tested surveys or develop your own questions based on the Institute's ideas. Visit the Web site at www.search-institute.org/.

The *Social Capital Community Benchmark Survey* was used by the Saguaro Seminar, a project about civic engagement run out of the Kennedy School of Government at Harvard University. The survey asks individuals questions about their communities and their involvement in and attitudes about civic activities. The full survey can be found at www.cfsv.org/communitysurvey/docs/survey_instrument.pdf.

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Chapter 4

Creating and Sustaining Outside Partnerships

There's a commitment from the principal and the teachers involved. And, you know, they're able to arrange what they need to get here, whether it's transportation or the time. But it's our joint commitment to bringing the kids and residents together that makes the program work.
—Nursing home
   activities director

Almost all intergenerational programs are built on partnerships between two or more organizations. This is due to the simple fact that services that are provided to older adults and to youth are typically segregated, with organizations serving these populations working separately. However, organizations that reach out and make connections have many more options than those that do not. With the right partner, you will be able to do things together that you never would have been able to do on your own.

Developing a productive community partnership takes work. It requires a basic understanding of how the other organization functions, adequate time for planning, the willingness and ability to compromise, clarity about each participant's role, and a commitment to ongoing nurturing of the institutional relationship. Yet, the potential benefits of forming these relationships are significant. In fact, the success of your intergenerational program may, to a large degree, hinge on your ability to establish and maintain positive collaborations with individuals and organizations in your community. In this chapter, we look at why collaboration is so important, and outline steps you can take to nurture these connections.

Why Form Partnerships?

Forming a relationship with the right partner will enhance your capacity to create and deliver unique and exciting programs tailored to the needs of your organization and community. A good partnership brings other benefits as well:

- *Partnerships connect you to program participants and volunteers.* When unaffiliated organizations collaborate, they can bring together older adults and young people who might otherwise not have a chance to meet, let alone provide services to and with one another.

- *They introduce new and varied perspectives.* Community partners can provide a context for understanding and prioritizing the information you collected during your needs assessment. They can also help you determine whether community members are ready to address a given problem or are likely to support a particular type of program.

- *They increase your capacity to get the work done.* Well-selected partners help you access the systems, resources, or volunteers you need to move your program forward. They also broaden the pool from which you draw expertise— knowledge of child development, issues in aging, research and evaluation, the arts, how children learn, how adults learn, and so much more.

- *They reduce duplication of efforts.* By working together, organizations create a more comprehensive, systematic approach to solving problems. Partners can see how and where their needs overlap and develop strategies that build on one another's strengths.

- *They strengthen community involvement in and commitment to intergenerational programming.* People who are directly engaged in the planning and implementation of a program will be more invested in having it succeed. They will also be motivated and better prepared to incorporate intergenerational strategies into future endeavors.

R *They increase opportunities for fundraising.* Well-selected partners can provide you with knowledge of and the ability to obtain funds from a variety of sources. Other organizations also round out your team by providing missing areas of expertise or skills.

An Innovative Three-Way Partnership

The need was for Latina teen mothers to feel supported, learn parenting skills, and learn how to prevent further pregnancies and avoid drug use. The resource was Latina women who had already raised their families. The idea was to use a mentoring approach—pairing older women with teen mothers. Putting it all together required a unique partnership of three organizations: one experienced in working with older adult mentors, one—a family planning agency—to provide resources on teen parenting and pregnancy prevention and to conduct the outcome evaluation, and one—a community-based organization serving Latinos—to enroll mentors and teens and to provide case management. Together, these organizations applied for and received a three-year grant from the Center for Substance Abuse Prevention to establish Abuelas Y Jovenes, Grandmothers and Grandchildren.

HOW ARE PARTNERSHIPS STRUCTURED?

There are several models for how organizations can work together toward a common goal. Organizations typically work together by cooperating, coordinating, or collaborating with one another.

Cooperation

Cooperation tends to involve short-term, informal relationships. Cooperative partners may share information about the subject at hand, but each organization retains its authority and keeps its resources separate (Winer & Ray, 1994, p. 22). For example, the Time Out Respite Program links families caring for frail older adults to college students who provide low-cost respite services. The program requires cooperation from professors at several local colleges to recruit students and from agencies serving older adults to get referrals for families needing respite.

Sometimes a partnership may occur within an organization, such as when a church's youth group and senior group develop a project together.

Coordination

Coordination is characterized by more formal relationships focused on longer-term interaction around a specific effort or program. Coordination requires some planning, division of roles and frequent communication between organizations. Authority still rests with individual organizations, but resources are made available to participants, and rewards are shared (Winer & Ray, p. 22). Discovering Our Past/ Connecting With Our Future in Westchester County, New York, is an example of agency coordination. In this local history project, the intergenerational coordinator at the White Plains Youth Bureau recruits and trains students to conduct interviews, while the White Plains Senior Center coordinator conducts extensive outreach to recruit older adults. Finally, the White Plains cable station airs the videotaped interviews for the full community to enjoy.

Collaboration

Collaboration can be described as a mutually beneficial and well-defined relationship between two or more organizations that produces a "greater" product than either could produce alone. Collaborative relationships require more planning and communication than cooperative or coordinated relationships do. Partners usually pool or jointly secure the resources and share the results and rewards. These partnerships require structure; two significant components of collaborations are authority and accountability. The First Nations Partnership Program is a collaboration between the University of Victoria and community groups from seven native tribes in Western Canada. Tribal elders worked with university faculty to develop the "Generative Curriculum Model," a child care training program that transmits tribal culture and values to native child care workers and, consequently, to the children with whom they work (Ball, Pence, Pierre, & Kuehne, 2002).

As your program grows and expands, you may find that the nature of your connections with other organizations may change. For example, the casual partnership that produced a one-time holiday celebration may become more formal when you and your partner embark on a year-long service-learning project.

Creative Partnerships

Your project can be enhanced by participation from organizations with specific programmatic expertise. Go beyond cross-age partnerships, and consider contacting horticultural societies, museums, art and music schools, theater troupes, and animal shelters. For example, a high school and a long-term care facility received funding and training from a history museum to help support the development and publication of a book documenting the life stories of the facility's residents.

How Do You Establish Effective Partnerships?

There is no one way to create a successful partnership. Circumstances and the people involved determine how connections are made, who is invited to participate, what participants will do, and how they will do it. You may have an idea for a program but not know whom to approach as a partner. As discussed in Chapter 3, it is advisable to begin your project with a needs and resources assessment. An additional advantage of the assessment process is that it often reveals a number of potential partners. Then again, you might begin your project already knowing what organization you want to work with, in which case this potential partner may have helped you with the assessment.

While the way we work with others seems at times to be an iterative and intuitive process, there are systematic ways to think about establishing connections. The following section presents an eight-step process for forging partnerships that can help make your ideas a reality.

> *What worked was how the teacher and I prepared for the project together. We came together like two magnets.*
> —Senior center
>   activities director

ESTABLISHING PARTNERSHIPS AT A GLANCE

STEP 1: Articulate a vision
STEP 2: Determine your capacity to achieve this vision
STEP 3: Identify potential partners
STEP 4: Do some research
STEP 5: Make contact
STEP 6: Meet face to face
STEP 7: Decide if you want to move forward
STEP 8: Formalize your relationship

Step 1: Articulate a Vision

Your pre-program assessment and your understanding of the intergenerational model or strategy you have selected will give you the information you need to express with conviction what you expect to do and to achieve.

Step 2: Determine Your Capacity to Achieve This Vision

What resources (e.g., access to volunteers, access to service recipients, supplies, eligibility for funding sources) do you need to make your idea happen? Figure out which of these resources your organization can bring to the project and which ones you can't. You will want to select a partner who can provide the resources your own organization lacks.

A Neighborhood Partnership

To meet their community service requirement, middle school students from Friends Central School, in Wynnewood, Pennsylvania, started visiting residents at Saunders House, a long-term care facility located a few blocks away, for a weekly visitation program. The teachers and facility staff worked together to develop creative programming. To orient students to the safety rules and the layout of the facility, the staff wrote up a scavenger hunt for the students to play at the beginning of the school term (e.g., "Find out the color of the button on the stairwell that will unlock a closed door"). Each year, the staff developed a different project for the students and residents to do together. These included creating a tile mural that was permanently mounted at Saunders House, oral history projects, and varied musical projects. The programs were so successful that students encouraged their peers to sign up. The partnership has lasted for more than 18 years and has become part of the routine programming for both the school and the residential facility. Students enjoy their experiences so much that they come back in high school to volunteer on their own.

Step 3: Identify Potential Partners

Ideally, you will want to choose a partner (or partners) who can fill some of your resource gaps. The scope of your program (neighborhood, city, state) and the proposed target population(s) will greatly influence your selection. Realistically, it may be difficult to find a partner that meets all your needs, particularly in a smaller community with fewer agencies. Compile a list of potential partners, noting the ways in which each might enhance your project.

Schools and youth organizations, as well as organizations focusing on the aging, exist in most communities. Familiarizing yourself with the range of organizations catering to these two populations is a good way to start identifying potential partners for your list.

Schools and Youth Organization Partners

Schools and school districts are increasingly involving students in programs with older adults. Intergenerational programs are compatible with schools' goals relating to community service, citizenship, and the involvement of more caring adults in the lives of children. Older adult volunteers have been shown to be effective mentors and tutors in school settings.

Schools vary in their level of interest in intergenerational programs. You may need to shop around before you find a school that is responsive to your idea. Whether you contact the school directly or go through your school district will depend on what you have in mind. If there are several schools in your vicinity—elementary, middle, and high—you may want to call the school district. Ask to speak to someone who links schools with community organizations. This person can help guide you to the school with the greatest interest in working with an organization that serves older adults. On the other hand, if the elementary school is just down the street, and the older adults you serve want to work with young children, then contact the school directly. Ask to speak with the assistant principal, principal, or person in charge of working with community organizations.

Bear in mind that many schools and school systems have a shortage of teachers and other staff. Teachers' schedules are tight, and they often have no access to phones during the day. You need to be persistent, understanding, and flexible when communicating with teachers.

◯◑ Service-Learning

A dominant impetus to schools' openness to intergenerational projects is the increased popularity of "service-learning," a teaching method in which students integrate their experiences doing community service into their academic studies. According to a 1999 survey, one-third of all U.S. schools and half of public high schools have service-learning programs (Compact for Learning and Citizenship, 2001, p. 7). The growth in service-learning provides an opportunity for aging service organizations to form sustained partnerships with schools and teachers and to have more young people involved in structured activities with the organizations.

Intergenerational projects provide an ideal forum for service-learning. Service-learning projects can be designed for elementary school- through college-age students. Developing a successful project, however, requires close collaboration between the school and the community organization. Faculty must ensure that the service experience is tied to the curriculum, and program staff must provide the service opportunities and necessary guidance. For more information on service-learning, visit the National Service-Learning Clearinghouse, www.servicelearning.org.

In addition to schools, there are many potential partners in organizations that work with youth:

Youth service organizations. To locate young volunteers, consider partnering with traditional youth service organizations, such as the Boy Scouts/Girl Scouts, Boys and Girls Clubs, 4-H, and YMCA/YWCA.

Faith-based institutions. Churches, synagogues, and mosques often have youth groups, host after-school and child day care centers, and attract young people who want to be involved in education and service.

◎ *Programs funded by the Corporation for National and Community Service are ideal partners because they involve volunteers of all all ages. These programs include: AmeriCorps, Learn and Serve, and Senior Corps (Foster Grandparents, RSVP, and Senior Companions).*
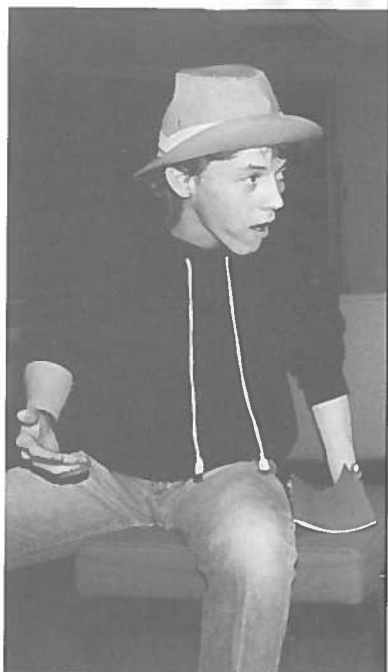
Organizations serving youth and families with special needs. There are local and state government and private organizations that serve children and families, such as the Department of Health and Human Services (or Social Services— the names vary by municipality and state), the Department of Health, the Department of Mental Health/Mental Retardation, the March of Dimes, and Easter Seals. In your community, look at recreation centers, summer camps, residential group homes, foster care agencies, health-related support groups, diocesan-related social service organizations, and independent social service agencies as potential partners in intergenerational programs.

Child day care. Child care centers serve preschoolers and often provide infant care. Older people can serve as volunteers or paid workers in day care settings, with such responsibilities as supervising activities; reading to, feeding, and holding children; and helping to put them to sleep. Phone directories have listings of child day care centers, early childhood education centers, and preschools. State offices maintain publicly available records about outstanding complaints and inspection findings as well as listings of those centers that are accredited by the National Association for the Education of Young Children (this list is online at www.NAEYC.org).

After-school programs. With more parents working outside the home than ever before, the need for structured activities for children during after-school hours is growing all the time. After-school programs may be school-based extended-day programs with an academic focus, or may be recreation or enrichment programs run by any category of organization—faith-based institutions, social service organizations, child day care centers, etc. While after-school programs are not as uniformly regulated as child day care centers, if an after-school program receives public funding, it may need to comply with some set of standards. To identify after-school programs, contact local school districts, faith-based organizations, and United Ways.

Partners in the Aging Network

There are various kinds of organizations for older adults that you should consider as potential partners for your project.

In most communities, older adults receive social and health services in group settings and in their own homes. Community-based aging services include the following:

Area Agencies on Aging (AAA). Every county in the United States has an AAA that provides central information and support for older adult services. It may be possible to partner with either the AAA or one of its sub-contractors.

Senior centers. Senior centers promote social activity among older adults by holding a variety of recreational activities. They sponsor health promotion programs, host health screenings, and serve inexpensive or free nutritious lunches. Most senior center members are able to live independently in the community. Senior center members participate in intergenerational arts and oral history projects, volunteer at schools, and work with youth on environmental preservation.

Adult day services. Adult day services are community-based group programs designed for functionally and/or cognitively impaired adults. These programs are structured; they provide a variety of health, social, and other related sup-

port services in a protective setting during the day. They do not provide 24-hour care. Frequently, adult day services and child day care programs hold joint intergenerational programs in which children and adults provide stimulation and affection to one another.

In-home services. Older adults with short-term or chronic health conditions may receive services in their homes. These adults can serve as volunteers, placing regular phone calls to young people who are home alone after school. They may also benefit from the services of friendly young visitors, respite workers, or household helpers. Try partnering with a private home health agency.

A number of volunteer organizations cater specifically to seniors:

Retired and Senior Volunteer Program (RSVP). RSVP is a federally sponsored program that is part of the Corporation for National and Community Service. Operating in every state, RSVP places older adult volunteers in a variety of community settings. You can become an RSVP "station" to which older volunteers are referred. For contact information, see the RSVP Web site at www.seniorcorps.org/joining/rsvp.

American Association for Retired Persons (AARP). AARP is a national organization with more than 34 million members age 50 or older. AARP has branch offices in all states; many of these sponsor and/or endorse volunteer activities. For contact information, see the AARP Web site at www.aarp.org/statepages/home.html.

Faith-based institutions. Creating partnerships between schools or youth organizations and religious institutions in your area can be an effective strategy for strengthening intergenerational ties in your neighborhood, as well as addressing specific community concerns.

Community voluntary organizations. Local service organizations, such as Rotary International, Kiwanis International, or the Masons, can serve as partners in a variety of service projects.

Retiree organizations. Members of retiree associations from different professions are often particularly interested in sharing their experience and knowledge with younger generations. Consider contacting groups of retired teachers, lawyers, scientists, law enforcement officers, builders, etc. Many large corporations offer organized retiree groups as well.

Senior housing and retirement communities. Many communities have "housing projects" specifically for seniors—federally funded housing that was built for older adults and people with disabilities. Locations of senior housing projects can be found on the Web site of the Department of Housing and Urban Development: www.hud.gov. In addition, there may be unofficial senior housing where you live—apartment complexes or communities where the vast majority of residents are older people. (These are referred to as "NORCs"— Naturally Occurring Retirement Communities.)

Continuing care retirement communities. Also called "life care," these are retirement communities where some people live in apartments on their own, others require a moderate level of support, and still others require more intensive sup-

port due to physical disabilities or cognitive declines. These communities can be excellent partners because they afford young people the opportunity to interact with both healthy and frail older adults.

Long-term care facilities that are particularly well-suited for intergenerational programs include the following:

Nursing homes. These are residences for people who find it difficult or are unable to live on their own. Residents usually have physical disabilities and/or problems with memory and cognition, and often have fewer family supports than other older people have.

Assisted living facilities. In these, residents have their own apartments with access to supportive services, such as personal care aides and housekeeping. The availability of formal programs varies, but such facilities lend themselves easily to intergenerational projects.

Step 4: Do Some Research

Before approaching the organizations on your list, find out all you can about them. What is their reputation? Do they have a lot of staff turnover? Do they tend to be innovative? Do they have a good history of collaborating with others? The answers to these questions can be extremely revealing and will help you decide which potential partner is ultimately best-suited for the project.

There are other significant advantages to collecting this information. Knowing your partners' strengths and weaknesses better prepares you to:

- develop a work plan that maximizes the potential benefits of the partnership and minimizes the potential drawbacks

- make your initial "pitch" more compelling and on target

- avoid entering into partnerships with little promise of success.

Step 5: Make Contact

Once you have selected a potential partner, contact the person from that organization who is in the best position to make the partnership happen. Use your initial phone call to describe who you are and the type of project you have in mind. In marketing your project, emphasize how the project can help meet that organization's priorities, especially in relation to its goals for the people it serves (e.g., visits from students can relieve the isolation of nursing home residents). In addition to listing the multiple ways that working together will benefit them (for example, by providing money, access to other resources, or public recognition for their contributions), articulate why their participation in the project is critical to its success. Be clear that you are flexible—leave room for planning together.

Step 6: Meet Face to Face

Once you have sparked their interest, it is time to meet your potential partners face to face to discuss whether a partnership might help both organizations meet their goals. In planning this first meeting, determine who from each organization must attend (e.g., staff who will be responsible for facilitating the project, senior management). Discuss in advance what information each organization should bring with it. It is also a nice gesture to let your potential partner choose the site for the meeting.

TIPS FOR MEETING WITH A POTENTIAL PARTNER

From the beginning, give both partners a voice to promote buy-in and instill a sense of ownership.

Frame your discussion in terms of how the intergenerational strategy fits into the potential partner's mission and structure. Often, intergenerational programs can easily be incorporated into existing services (e.g., an oral history project with neighborhood youth could be built into the weekly activity plan at a nursing home or senior center).

Provide an opportunity for each agency to describe its programs and services and discuss how the organizations might work together.

Paint a vivid picture of the intergenerational strategy or program you are considering. Talk about where and how it has been used in the past, and the positive outcomes it has produced.

Review how the project would benefit the partner. Have something to "put on the table" for your potential partner. Even a small amount of funding can be a strong incentive for collaboration. Other benefits include access to resources or public recognition for the partner's contributions.

Have an honest discussion about the strengths of each organization, how they might complement each other, and possible roles and responsibilities in the partnership. Whenever possible, be flexible!

Be clear about your time frame. Are you expecting a six-month or a two-year time commitment? The time frame needs to make sense for that organization— schools have proscribed schedules; child day care centers and senior centers are more open. Keep in mind that ambitious projects may take a year or more to get up and running smoothly.

Avoid using acronyms or other field-related jargon. People from different organizations do not always share the same language. A teacher, for example, may think that AAA refers to the American Automobile Association, rather than the Area Agency on Aging.

Step 7: Decide If You Want to Move Forward

With the initial meeting behind you, take some time to process how it went. Did the two groups seem compatible? Do you share a similar philosophy of service? Are there potential turf issues? Are there other possible areas of concern, such as conflicting work styles, priorities, or organizational values? How might these be resolved? Most importantly, is there someone at the other organization who is committed to making the collaboration work, and will that person have the organizational support to make it happen?

Trust your instincts! If you feel excited about embarking on a journey with the people involved, fantastic. But pay attention to any reservations or concerns you may have, and don't move forward until you find a way to address them. If problems seem insurmountable, look for a different partner.

Step 8: Formalize the Relationship

Whatever you decide, make sure to put it in writing. If you decide to move ahead with the partnership, send a thank-you note that includes minutes of the initial meeting and suggestions for next steps. If you decide not to proceed, share this information with your contact at the other organization either in person or by phone, followed up with a thank-you letter.

Once all participating organizations have verbally agreed to partner, create a written memorandum of understanding, signed by the executive directors of the agencies, that clearly defines the responsibilities and expectations of all partners. Oral agreements can be misunderstood when they are made, and they are easily re-interpreted later by one partner or the other. The signatures of the executives commit the organizations to the partnership. Maintaining commitment over the course of a long-term project can be especially difficult. Often, key players change jobs or take leaves of absence, and programs get derailed. A signed agreement obligating all organizations to maintain their commitments is crucial for getting or keeping the project on track.

What is in a Memorandum of Understanding?

- A brief description of the project
- The project timeline
- The contributions of participating organizations (time, money, space)
- A stated commitment to participate in project meetings, implement the action plan, and participate in the program evaluation
- Appended materials, such as the project's logic model or action plan (see Chapter 5), or a grant proposal

How Do You Keep a Partnership Going?

Keeping your partnerships running smoothly isn't always easy—particularly once the initial excitement dies down and the real work begins. For every step forward, you seem to take two steps back: Competition arises, partners don't follow through as expected, hidden agendas surface, progress slows down, or individuals become disillusioned.

Here are some of the challenges you should anticipate as part of an intergenerational partnership:

- *Extra work*. Staff may see intergenerational programming as "extra" work that is not part of their regular job responsibilities.

- *Fear*. Sometimes teachers resist becoming involved in intergenerational programs because they are concerned that the older people will become sick or die. Staff who work with older adults are sometimes reluctant to develop programs involving "at risk" youth.

- *Turf issues*. Sharing resources can be viewed as "losing ground" and losing money by organizations representing different age groups.

- *Age-segregated funding streams*. It is sometimes difficult to fit intergenerational programs into existing funding initiatives for youth or aging populations.

- *Lack of knowledge*. Organizations serving different age groups are often unaware of one another's resources, needs, limitations, and logistical challenges (e.g., transportation, timing of activities, scheduling of meetings).

- *Accountability*. It can be challenging to hold staff partners accountable for their roles without the authority of a common supervisor.

- *Division of labor*. Often, one partner is more invested in the intergenerational program than the other and puts disproportionate effort into the program.

No partnership is immune to these challenges, but they needn't be devastating. Below are 11 guidelines for building a partnership that has the fortitude to withstand challenges as they arise.

1. Decide Together How to Provide Leadership

Most intergenerational projects are led by the individual(s) who initiated the partnership. However, leadership can be determined in a variety of ways: key staff members may rotate leadership or elect project facilitators, staff members may volunteer, or a board of directors may appoint a leader. Some projects also have joint leaders; this can be particularly effective when representatives from each partnering organization agree to serve together.

2. Establish Clear Goals

Expect that to some extent your initial vision will change with your new partner's input. Take time to discuss the kind of program you want to develop and what you hope to achieve. This will increase the likelihood that all partners stay headed in the same direction. Be realistic: Develop goals that you can reasonably expect to accomplish. Revisit your goals periodically and assess the extent to which you are meeting them.

Good partnerships withstand questions, conflicts, debates, and disagreements; provide structures and processes to solve problems; and are maintained—even strengthened—after differences have been resolved (Epstein, 1995).

3. Clarify Roles and Responsibilities

Determining the roles and responsibilities of each partnering organization, and the key individuals within each organization, is an important element of program planning. One critical role to fill is that of project liaison—someone who will be the point person for all communication between organizations. Having an available liaison is critical for effective troubleshooting after your program begins. Appoint a back-up person in case the liaison is unavailable for an extended period of time.

Specific responsibilities will, of course, vary by project and will change over time. Set task deadlines and decide how you will handle uncompleted tasks. Throughout your partnership, prepare lists of agreed-on project tasks, specifying the person and agency that will be responsible for completing them and the expected date for completion. Try to ensure that no one person is unfairly burdened with program responsibilities.

Problem-Solving with a Partner

The Jewish Council of Yonkers (JCY) partnered with the local school district to establish SMART, a program in which older adults provide one-to-one literacy tutoring for students from elementary through high school. In order to evaluate the program's effectiveness, school reading specialists needed to test students in the district and submit their pre- and post-test scores to SMART. In the program's first year, reporting was erratic, and JCY was not able to document the improvements that were happening through the program. JCY approached the school district, and together they decided that one person would be assigned to oversee the collection of evaluation data. As a result of joint problem-solving, SMART was able to document its statistically significant impact on reading scores among Yonkers' students.

4. Recognize that Effective Partnerships Function at Multiple Levels

In order for your program to succeed, you will need the support of both executives and line staff. Executives must give their "stamp of approval" not only to the program itself, but also to the allocation of requisite financial and personnel resources. Yet, staff members also play a critical role in program success. For example, programs held in long-term care facilities depend on the commitment of nurse aides to make sure that residents are ready to participate on time. These individuals will be more invested in making sure that the program runs smoothly if they understand the value of the program, know what to expect, and are explicitly and openly thanked for their assistance. An invested staff is also more likely to carry on with project activities during periods of administrative turnover.

After issues about money, accountability is probably the single greatest threat to successful partnering. To avoid misunderstandings, document everything in writing and try to foresee where accountability problems might arise.

Collaboration occurs among people—not among institutions. Workers must be supported at each level of the organization where collaboration is expected to take place (Bruner, 1991, p. 26).

5. Communicate

It is very important to develop a procedure for ensuring that regular communication takes place. This can be particularly difficult when key staff members (e.g., teachers and activities directors) have very different work schedules. Decide how often you should meet to discuss progress, identify and resolve problems, explore new opportunities, or simply check in. Establish formal communication channels, such as weekly memos, e-mails, online discussion lists, or phone calls, and, when meetings occur, send out meeting notes to keep those unable to attend updated on activities. In addition, make sure to inform your partner of any project-related activities you think your partner would want to know about. For example, if your agency has primary responsibility for creating recruitment materials, make sure that your partner has an opportunity to provide feedback on drafts and approve the final design.

Snow Day Snafu

On a day when a class of fifth graders was scheduled to visit a nearby retirement community for their weekly oral history project, school was canceled because of snow. Staff at the retirement community, unaware that school was closed, brought the residents to the social hall to meet their young partners, none of whom showed up. The elders were disappointed, and the staff members were angry that no one from the school had called to let them know about the cancellation.

6. Address Problems as They Arise

Listen closely, and respect the validity of your partner's experiences and points of view. Be aware, for example, of the multiple demands on teachers, the shortage of material resources at schools, and the frequent staff shortages and staff turnover at long-term care facilities. Be flexible and willing to re-negotiate roles and responsibilities, if necessary. Make sure to periodically assess the "health" of your partnership and how you two are working together. One way to do this is to incorporate an informal evaluation into a meeting where other things are being discussed.

7. Discuss Financial Matters Openly and Honestly

If your partnership involves shared funding, make sure that the financial agreement is clear and acceptable to everyone. Specify in writing who will handle fiscal oversight and how much money each agency will receive in return for its level of effort. Be clear about in-kind contributions—acknowledge staff time and other non-covered costs that either partner bears. Realize that even if your organization receives compensation for its part in the project, staff members may spend additional time in order to realize project goals.

8. Address Concerns About Liability

Be sure to discuss the topic of liability, both for property damage and for injury to program participants. Determine how liability will be divided between partners and how you will report and track incidents. Know what your insurer covers and does not cover, and talk with your attorney and/or insurance carrier for advice that applies to your locality and state.

9. Respect People's Time

Don't schedule more meetings than are absolutely necessary, and keep them to a reasonable length. Always begin on time. Set an agenda and stick to it. Have copies of all needed information available. Make sure that partners know what is expected of them—otherwise, important tasks may go undone, and time will be wasted. Always end a task-oriented meeting by identifying "next steps" and asking, "Who is going to do what by when?"

10. Get Things Done

Avoid getting bogged down in lengthy planning and abstract discussions. Keep moving toward action and accomplishment. Long-lasting partnerships keep on acting—visibly, energetically, and effectively.

11. Share the Limelight

Be sure to give your partner organization public recognition for its contributions. Include representatives of the partner organization in all events and media coverage and acknowledge them in the materials you produce.

In Closing

Collaboration between organizations that serve different populations is one of the most important, challenging, and exciting aspects of intergenerational programming. Partners have the infrastructure to gather people from different age groups and the expertise to ensure that a program is developmentally and culturally appropriate. As partnerships gel and grow, creativity flourishes. Human services and educational professionals as well as older and younger participants can develop a broader vision of what can be achieved in a community where institutions collaborate.

IN THE **CD-ROM Toolbox**

- **Sample Agenda for Introductory Meeting with Potential Partner**
- **Tasks Form for Interagency Projects**
- **Sample Community Partner Agreement**
- **Sample Memorandum of Understanding**
- **Checklist – Building Partnerships**
- **Links to Chapter 4 Resources**

RESOURCES

The Amherst H. Wilder Foundation has a number of publications with concrete advice relevant to organizations that are entering or continuing organizational partnerships. *The Collaboration Handbook: Creating, Sustaining and Enjoying the Journey* by Michael Winer and Karen Ray (1994) is a particularly thorough resource for complex or long-term collaborations. See the Wilder Web site at www.wilder.org for more information.

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Connecting Generations, Strengthening Communities

Chapter 5

Planning Your Intergenerational Program

There's a lot involved in having older adults tutor school children. It's important to envision the experience of the participants, as well as come up with a list of what the children and adults will be doing. Then you can stand back and say, "These are the things we need to do to make those experiences happen."
—Program director

Simply bringing together young and old does not always result in instant inter-generational "magic." Rather, this "magic" requires lots of behind-the-scenes planning and attention to detail. While it may be impossible to anticipate every potential challenge, preparation and planning will help you create a program that meets your identified needs and circumvents obstacles that could compromise your program's success.

Planning lets you map out what lies ahead and build support for your initiative. It provides a basis for negotiating roles, determining accountability, and avoiding misunderstandings. All parties are more likely to feel committed to a plan that they have had a hand in producing. Indeed, some of the best programs are the result of conscientious and coordinated planning between collaborating agencies.

The time and resources you devote to planning will depend on the scope of your program. As programs grow in size and complexity, more in-depth planning will be needed. Yet, even the most basic and seemingly straightforward program can benefit from a thoughtful planning process. This chapter lays out key steps involved in program planning; you may want to follow the steps in order or to choose only those steps that make the most sense for your endeavor. The chapter also highlights some special planning issues that are relevant to intergenerational programs.

Planning Makes All the Difference

Two programs involving a long-term care facility and a local high school produced very different results. The first, an oral history program, began with a meeting between long-term care staff and one of the teachers, a written plan, and clear expectations for both teens and the residents regarding their roles. By all accounts, the project was very successful. The residents were particularly impressed with the students' courtesy and respect. In contrast, plans to hold a year-end prom at the nursing home were last-minute and hasty. The event was chaotic, and residents commented that the teens were rude and unruly. The residents did not realize that the exact same group of students had participated in the oral history program.
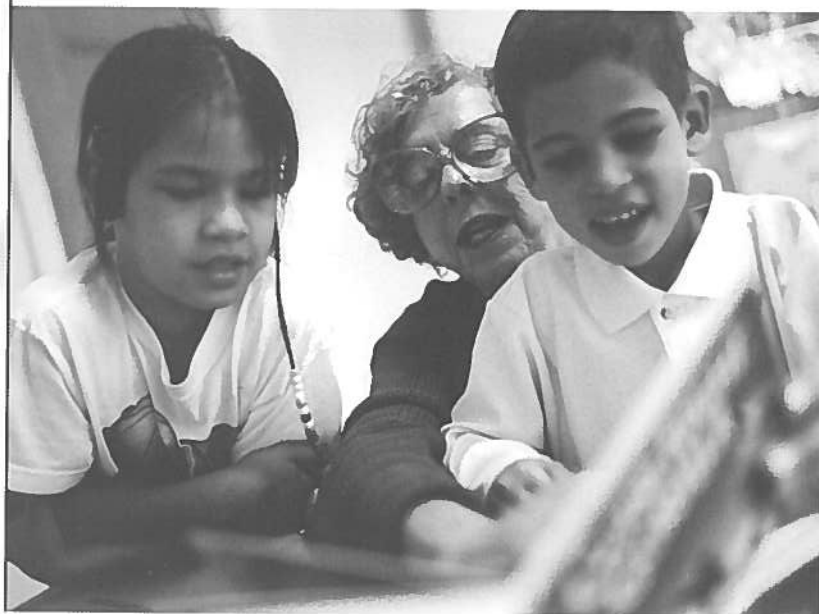
KEY STEPS IN PROGRAM PLANNING

Program planning is a sequential process involving seven key steps. Following these steps helps program planners ensure that there is a relationship between what they want to achieve and the activities they plan to implement. To illustrate the steps, we have used a hypothetical intergenerational tutoring program called Reading Partners.

PROGRAM PLANNING AT A GLANCE

1. Clarify your mission and goals
2. Develop a logic model
3. Establish a timeline
4. Create an action plan
5. Develop a budget
6. Build internal support and prepare staff
7. Structure participants' roles
8. Design your evaluation

Step 1: Clarify Your Mission and Goals

The first step in program planning is to articulate what you want to achieve. One way to do this is to develop a mission statement. A mission statement is a short narrative that describes the general focus of your program. It typically includes what you want to accomplish and a general description of how you will get there.

State Your Mission

This template can be used to create a mission statement for any program:

The mission of [your program] is to [address a situation] for [your target population] through [program description].

Once you have your mission statement, you can lay out program goals specifying who will be affected and what will change as a result of your program. Your mission and goals will continue to have great importance throughout the implementation and evaluation process. Whenever there is uncertainty as to what to do or what to evaluate, a safe rule of thumb is to look again at your mission and goals to refocus and get back on track.

A program's mission and goals should be consistent with the mission and goals of the sponsoring organizations. This fit will help you garner ongoing support for your program and help it function effectively over time.

Mission and Goals of Reading Partners

A senior center director is interested in promoting volunteerism among her members. After conducting a small needs assessment, she shares with the older adults that a large percentage of the town's elementary students are reading below grade level—and that this problem may worsen, due to a growing teacher shortage. To address this issue, the group decides to develop Reading Partners. The director then writes the following mission statement and program goals:

The **mission** *of Reading Partners is to improve the reading skills of elementary school children in our community by having older adult volunteers provide regular one-to-one tutoring.*

The **goals** of Reading Partners are as follows:

1. To improve the reading skills of children who are reading below grade level.

2. To provide sustainable, meaningful volunteer experiences for older adults in the community.

3. To develop a system for tutoring children that can be integrated into the ongoing operations of elementary schools.

Step 2: Develop a Logic Model

Once you know where you want to be, you need to figure out how you are going to get there. One useful tool for doing so is a logic model—a flow chart that lays out the sequence of events a program will follow to reach its goals. It is a visual display of the connections and relationships among program activities and intended outcomes. If prepared properly, a logic model should not only give the necessary direction to a program, but also provide the groundwork for the eventual program evaluation.

A typical logic model includes six components.

- *Situation* describes the issues or needs that your program will address. Your situation should be based closely on the findings of your needs and resource assessment.

- *Input* represents the resources you must invest in the program in order to meet your goals. Some examples of resources include staff time, money, space, community partners, supplies, and media support. Keep in mind that the longer it takes to produce long-term results, the more resources you will need.

- *Activities* are what the project will do to reach its goals. Logic models tend to describe broad, rather than specific, activities. For example, a model might include the activity "recruiting volunteers" but would not list the many steps that comprise recruitment, such as sending out flyers and developing an interview protocol. (Rather, these will be part of your action plan, discussed later in this chapter.)

- *Desired results* are the outcomes you want your program to achieve. A fleshed-out logic model will list short-term, intermediate, and long-term results. Short-term and intermediate results may also be called objectives; these are the measurable steps that cumulatively lead to your long-term results, or overall goals.

- *Assumptions* are the beliefs and/or theory that inform your program planning decisions and provide "logic" to your logic model. They often consist of a series of "if-then" statements: If you invest particular resources, then you will be able to conduct the planned activities; if you implement the activity as planned, then you will meet your short-term objectives; if you meet all your short-term objectives, then you will achieve your long-term goals. It is important to revisit your assumptions throughout the planning process, so that you can go back and revise your model, as needed. Results from your pre-program assessment can help inform the Assumptions and Environment/Influences sections of your logic model.

- *Environment/Influences* describes the context in which your program will be implemented. It includes extraneous factors that might influence a program's effectiveness or interfere with program flow. Awareness of these factors may alert you to actions that need to be taken to make sure that the environment supports, rather than undermines, your program. You will want to include both current and potential environmental influences.

A logic model is best written by starting with the mission, goals, and long-term results, then moving backward. What are the intermediate and short-term results and the activities that need to happen to get your program to fulfill its mission? What resources are needed, and what are the assumptions and environmental influences that link the activities to the results? Remember to include representatives from all partnering organizations in the development of your logic model. If possible, also include your program evaluator or evaluation consultant.

The following diagrams provide a template for a logic model and an example of a logic model for Reading Partners, the hypothetical tutoring program described above.

Plan Logically

This template can be used to create a logic model for any program.

Situation | Input → Activities → Desired Results (short-term, intermediate, and long-term)

Assumptions · Environment/Influences

Logic Model for Reading Partners

Situation	Input	Desired Results		
		Short-Term	**Intermediate** (2–4 years)	**Long-Term** (5 years)
Children in community are reading below grade level

Older adults are seeking fulfilling volunteer experiences

There is a teacher shortage | Staff time

Volunteer time

Money (including volunteer stipends)

Space

Supplies

Consultants

Travel | Fifteen volunteers are recruited

One hour of one-to-one tutoring per week is provided to 50 children at one school | Forty older adults per year serve as tutors

One-to-one tutoring is provided to 200 children at four schools

Surveys of tutors show increases in life satisfaction and measures of well-being

Children's reading scores increase after being tutored | A cadre of 60 older adults provide weekly tutoring to children in six schools

Schools provide funds to help sustain the program

Children who are tutored have higher reading scores and continue to read at or above grade level |

Environment/Influences

1. Support from teachers and principals
2. Parental enthusiasm
3. School district leadership is eager to improve students' standardized test results.
4. Availability of transportation for tutors

Assumptions

1. If recruitment efforts are implemented, then the program will attract tutors.
2. If volunteers tutor, then they will feel fulfilled by the work.
3. If children receive tutoring, then their reading abilities will improve.
4. If the program is effective at helping children, then the school district will financially support its continuation.

Step 3: Establish a Timeline

Once you have completed your logic model, you are ready to establish a project timeline. The purpose of a timeline is to map out how much time each activity will take to complete. This process will help you see how activities relate to one another over time, and can be a useful jumping-off point for more detailed planning. Timelines may extend over months or years. For multiyear projects, separate timelines are usually completed for each year.

The following is an example of a timeline for the tasks that Reading Partners plans to accomplish in its first year, drawn from the activities listed in the logic model.

Timeline for Reading Partners

Activities: Year 1 (March–February)	M	A	M	J	J	A	S	O	N	D	J	F
Identify school partners	X	X	X									
Conduct planning with school administration	X	X	X		X							
Prepare teachers				X		X	X					
Recruit volunteers					X	X	X	X		X	X	
Train volunteers						X	X	X			X	X
Match volunteers with children							X	X			X	
Tutor children								X	X	X	X	X
Apply for ongoing funding from school district												X
Evaluate program							X	X	X	X	X	X

Integrating Theory into Program Design

When making decisions about your program, consider what has already been learned about the populations you work with. Social scientists who have studied human behavior may have developed theories that are relevant to what you want to achieve. These theories may provide you with the underlying assumptions to guide your program design. Kuehne described more than 15 theories that relate to intergenerational practice. The first example can help explain why intergenerational programs can benefit vulnerable youth. The second has implications for how program activities are designed:

- Attachment theory (e.g., Ainsworth, 1989) acknowledges the importance of parent surrogates with whom children may become attached, and who may play an important role in their lives, especially when relationships with parents do not provide security.

- Social identity theory suggests that to avoid stereotypical behavior among intergenerational program participants, it is important to focus less on the age differentials between participants (and thus, stereotypes) and more on the individual qualities of participants, regardless of their group differences (age). (Kuehne, 2003, pp. 149-150)

Step 4: Create an Action Plan

An action plan describes, in detail, how you will accomplish the activities included in your logic model. It lays out all of the tasks involved in conducting the activities and the individuals responsible for completing them. It also specifies deadlines, the resources needed, and a communication/accountability plan. You will want to complete a separate action plan for each of the main activities or strategies in your model. Make sure that all involved parties have their own copies of the completed plans.

When Is the Best Time to Develop an Action Plan?

Action plans should be completed before a program begins, but revisited and revised throughout implementation. For a multiyear program, it may be easiest to develop a detailed plan for the first 6–12 months and a more general plan for subsequent years. New action plans should be created for each program year and/or if the program changes significantly.

Who Should Be Involved in the Process?

Key participants from each organization should collaborate on the action plan. It is best to create the plan with all major players in one room; this gives everyone the opportunity to say what he or she will contribute to the project, and by when, in the presence of others, which is vital for documenting people's commitments and enhancing their accountability. Involving colleagues at the planning stage also increases buy-in and the likelihood that the program will be permanently woven into the fabric of the organization.

Participant Involvement

Young people and older adults will be more motivated if they have a voice in planning the program. Involve them in an intergenerational committee. Have them participate in your needs and resources assessment. Evaluate your program and integrate their feedback into future planning. If participants cannot be part of the formal planning process, give them a voice in substantive matters over the course of the project; for example, let them choose what books they want to read for a discussion group, what subjects they want to discuss for an oral history project, or where they want to go on a field trip.

What Should an Action Plan Include?

An action plan should include the following:

Tasks. Have your planning team brainstorm all tasks related to the activity.

Person(s) responsible. Identify at least one person who will be responsible for each identified task. Make sure that the designated person is aware of, and agrees to, the assignment. Try not to overburden any one person and to match, whenever possible, people's tasks to their skills.

Deadlines. It is important that everyone knows when each task should be completed, and that the person accepting responsibility for the task agrees to the proposed time frame. In setting deadlines, be realistic. Take into account competing demands and deadlines.

Resources. Write down all of the resources, in-kind and financial, needed to complete each task. (The financial resources commonly required for intergenerational programs are discussed below in Step 5: Develop a Budget.)

Communication plan. This maps out where people should go to report their progress. It also lays out how people should communicate (e.g., monthly check-ins, weekly e-mails, face-to-face meetings). Good communication is key to accountability. It also lays the foundation for effective program evaluation.

Action plans can be written as a narrative or put into a table format. The following is an action plan in table form for Reading Partners' first activity—identifying a school partner.

Action Plan for Reading Partners

Activity 1: Identify a School Partner

Tasks	Person(s) Responsible	Deadlines	Resources	Communication Plan	
Read school district Web site to identify schools with low reading scores.	Social work student intern	By March 9	Computer with Internet connection	E-mail report to activities director	✓
Contact school and district leaders to determine which schools are amenable to program, and set up meetings.	Senior center activities director	Meeting dates set by March 25.	Time—playing phone tag may be time-consuming	Report results of contacts at March 29 senior center team meeting. Attach memo to minutes.	✓
Hold meetings at schools. Include principals and/or assistant principals, a lead teacher selected by the school, and the senior center executive director and activities director.	Senior center activities director	Complete meetings by April 19	Printed materials to share at meetings	Report results at April 25 team meeting. Distribute written summary.	✓
Determine what school to invite to become a partner.	Senior center team	At April 25 team meeting			✓
Develop written agreement to collaborate, signed by principal and senior center executive director.	Senior center activities director	Signed by May 14	Fiscal officer's time to review agreement prior to signing	Distribute copies of signed agreement at May team meeting	✓

Date plan prepared: March 4

Names, titles, and signatures of persons preparing plan:

_____

_____

Step 5: Develop a Budget

Intergenerational programs cost money to run, in terms of both concrete budget items and staff time. Have a frank discussion of financial needs during the planning process. Participating organizations should consider how much financial support they can contribute.

Non-Staff Expenses

Some examples of non-staff expenses associated with intergenerational programs include the following:

- *Stipends*. Providing a nominal stipend can help a program attract volunteers and bolster volunteer buy-in and commitment. However, stipends will also create a significant expense for your program.

Volunteer Stipends

Stipends are not an hourly wage or a salary. Rather, they are a fixed payment—per encounter, per month, etc. If calculated on a per hour basis, most stipends would come to less than minimum wage. There are labor laws—as well as tax laws—that govern their use. Therefore, people who receive stipends cannot have an employee-employer relationship with the program. Talk to your human resources advisor about the rules relating to labor law. While laws may change, there were two important laws as of March 2005:

Americorps volunteers are exempt from minimum wage.

Many college students qualify for the federal work-study program, which covers 75 percent of a student's wages for work performed in the public interest. (The work site is responsible for contributing the rest.) Work-study students receive at least the minimum wage. Some states may also pick up the non-federal part of a work-study student's wage if the student is a resident.

- *Transportation.* Transportation is a common expense because intergenerational programs typically bring together groups from different locations. Many of the challenges associated with transportation can be circumvented by realistically estimating transportation costs in advance. If volunteers drive, plan to reimburse them for mileage, tolls, and parking. If participants do not drive, plan to either cover the cost of public transportation or provide the transportation yourself.

- *Celebrations, refreshments, and recognition.* Intergenerational programs frequently include special events—parties to help generations connect, end-of-project celebrations, and volunteer recognition events. Make sure to include in your budget the costs associated with these celebrations (e.g., food, entertainment, transportation, awards, prizes). Also, keep in mind that you will want to provide refreshments at your trainings and at most group activities.

- *Participant recruitment.* These costs include printed materials, mailings, and advertisements. Keep in mind that there may be expenses associated with recruiting both volunteers and people receiving program services.

- *Consultants.* If you don't have staff with the expertise to implement a particular program, you may need to hire a consultant. Common roles for consultants include training staff and volunteers, facilitating groups, planning and leading arts projects, designing and writing marketing materials, writing grant proposals, and evaluating programs.

- *Program supplies.* These might include books, art supplies, sporting equipment, and theater, concert, and amusement park tickets.

- *Program evaluation.* There is always some expense associated with program evaluation. See Chapter 11: Evaluating Your Program for a discussion of low-, medium-, and high-cost evaluations.

- *Miscellaneous expenses.* Don't forget to budget for those expenses that arise with any program, such as phones, postage, and photocopying.

Staffing Expenses

Generally, running small or short-term intergenerational activities can be integrated into staff members' existing job responsibilities. Administrators will be more likely to approve this use of time as they come to value the impact of intergenerational activities. More ambitious programs may require some half-time or several full-time staff, whose positions will need direct funding. The following table lays out the staff time required to run Reading Partners, as well as three other hypothetical programs. Note that staffing levels increase as the level of engagement between older adults and youth becomes higher.

TABLE 4.1
Staffing for Four Intergenerational Programs

PROGRAM	STAFF TIME
Reading Partners In Year 1, 15 volunteers will be recruited from one senior center and trained to work with 30 children at one school. Staffing levels will increase over time as the program expands to additional schools and senior centers. Level of engagement: medium	Initial tasks of establishing a partnership between the senior center and the school will be implemented by the senior center director, activities director, and social work student. One full-time staff person will be hired to run the program; a part-time retired teacher will be hired to recruit, train, and assist with supervising volunteers. This two-person team will work together to complete the following tasks: • Establish relationships with teachers • Recruit and select volunteers • Develop training materials for volunteers • Provide initial pre-service training to volunteers • Provide ongoing in-service training to volunteers • Prepare teachers to work with volunteers • Develop written materials (brochures, letters, etc.) to be sent by the school to the parents • Periodically monitor volunteers on-site • Plan holiday party and annual volunteer recognition event In addition to the two full-time staff, an evaluation consultant will be hired, and the senior center director will assist with writing grant proposals for program expansion.
Reading Discussion Group at Long-Term Care Facility Ten high school students and 10 retirees meet for a total of seven sessions, including one icebreaker/partnering meeting, five sessions to discuss a book, and a final celebration. Level of engagement: low	One teacher and one social worker will incorporate the following tasks into their other work commitments: • Participate in three planning meetings, multiple phone calls, and one post-project evaluation meeting • Read book and develop discussion questions • Recruit older adults • Orient youth • Supervise sessions • Plan and set up final celebration Altogether, the teacher and social worker will spend approximately 17 hours each—10 hours doing program planning, and 7 attending sessions.

PROGRAM	STAFF TIME
Intergenerational Respite Program	
College students provide respite care to caregivers of frail elders. Approximately 60 students serve 80 families per year.	A program director and a social worker or social work student will be hired to do the following:
Level of engagement: high, with each match lasting one school term	• Recruit student respite workers
	• Establish referral relationships with social service and health care organizations
	• Provide three student trainings per year
	• Do telephone intake
	• Conduct two home visits per family to match students and monitor
	The director will work full-time, and the social worker will work two days a week.
Mentoring Program	
A drug prevention program in which older adult mentors work with at-risk middle school children. Approximately 30 children are served by 15–20 mentors per year.	Two people will be hired to do the following:
Level of engagement: high, with each match lasting at least one year	• Write grant proposals for initial and ongoing funding
	• Establish partnerships (if a program is located in a school or after-school program or if mentors are recruited from specific organizations)
	• Recruit participants (can be labor-intensive and time-consuming—may take months)
	• Provide mentor training and youth orientation
	• Match youth and mentors
	• Monitor relationships
	• Plan and implement special events
	• Provide weekly life-skills training to youth
	• Write reports to funder
	Two full-time staff to work directly with youth and mentors will be required; one of these serves as program director.

When organizations run multiple intergenerational programs or are implementing a large-scale intergenerational program, they may hire a full-or part-time intergenerational coordinator. This is often the case with shared-site child and adult day care centers and with long-term care facilities. Coordinators do not run programs by themselves; rather, they oversee the process of planning and implementation. The coordinator's role comprises a variety of tasks (adapted from Penn State College of Agricultural Sciences, 2003):

- Getting projects started—planning and attending meetings with staff, parents, and partnering organizations to learn about their ideas

- Helping develop and launch the volunteer recruitment plan

- Working with staff from partnering organizations or departments to develop project plans, activities, and curriculum materials

- Organizing training for staff and volunteers

- Developing and maintaining systems for recording information on volunteer assignments, schedules, and activities

- Developing and chairing a team of staff and volunteers who implement intergenerational activities

- Overseeing team meetings

- Assisting with volunteer supervision

- Conducting outreach tasks (e.g., taking photos and developing articles for newsletters, writing press releases)

- Developing training and public relations materials to assist with staff and volunteer presentations

Step 6: Build Internal Support and Prepare Staff

As your colleagues come to see that intergenerational programs help further their goals for clients and the organization, their enthusiasm will increase along with their willingness to make a contribution to the effort. Involving colleagues at the planning stage enhances your initial creativity and increases the likelihood that the programs will be permanently woven into the fabric of the organization. Providing orientation and training will ensure that everyone involved is on the same page.

Albert Snook

Connecting Generations, Strengthening Communities

TIPS FOR ACHIEVING AND SUSTAINING INTERNAL SUPPORT

Include the director of your organization in the initial partnership meeting.

Talk informally to your colleagues about the impact of the program on older and younger participants.

Get your intergenerational program on the agenda for a staff meeting; show the *Connecting Generations, Strengthening Communities* video.

Have participants do a presentation on the intergenerational program at an organizational meeting, such as a school assembly or long-term care residents' council meeting.

Orient staff to the program, including program policies and procedures.

Provide cross-training to ensure that staff who usually work with older adults or youth feel comfortable working with a new population. For example, provide child day care staff with training on how to communicate with elders who have hearing or visual impairments.

Invite members of your organization to special intergenerational events, such as end-of-the-year celebrations.

Invite local media, including representatives of internal publications (such as newsletters and Web sites), to attend program events and write about your program.

Display program results, such as artwork, photos, essays, and poetry, on your organization's bulletin board.

Let Everyone Know About Your Program

At a high school in Tennessee, a group of older adults served as mentors to pregnant and parenting teens. One day, as several mentors were walking down the hallway, they heard some teachers make disparaging remarks about "all these old people in the school." The mentors were very upset and felt disrespected. Because there had been no teacher orientation or discussion about the program at teacher meetings, most teachers were unaware that the older adults were providing important support services to their students.

Step 7: Structure Participants' Roles

Whether participants are giving or receiving services, it is a good idea to write up a description of their roles when you are planning your program. This will help participants understand what is expected of them and of their cross-age partners. Also, seeing participants' roles in writing will help you assess whether you have the infrastructure needed to support the program.

In cases where a volunteer has a significant amount of responsibility—whether this means a long-term commitment or a degree of responsibility for someone else's well-being—you will want to draft a job description that formalizes that volunteer's role. In some cases, you will know before recruitment exactly what you need from volunteers. Other times, you may work with the volunteers to refine their job descriptions.

To develop a job description, begin by brainstorming all of the skills you think volunteers will need to get the job done. Create two lists: one for skills that can be developed through training, and the other for skills that volunteers will need to possess on arrival. Differentiate between those skills and attributes that are "must haves" and those that are simply desirable. It is important to know what you are looking for, but you don't want to be so specific that you rule out most of the potential volunteers you meet. Also, list any other attributes you would like volunteers to have, such as patience and warmth, or certain physical abilities.

In making your lists, consider the goals of your project, your target population, and the tasks you need volunteers to do. For example, if you are looking for volunteers to serve as mentors or respite care workers, necessary characteristics might include patience, open-mindedness, and the ability to listen well. If you believe that volunteers should share a common bond with the people they serve, you will want volunteers who speak the same language as your target population, or who share a cultural identity. Gender may also matter, especially if you are recruiting mentors for special populations, such as pregnant teenage girls or adjudicated teenage boys.

You will have many opportunities to use a volunteer job description as you move from planning to implementing your program:

- During the recruitment process, a job description will help you market the volunteer opportunity.

- During the screening process, it will help you ensure that the volunteer and organization have shared expectations.

- Throughout the program, it will help staff members supervise volunteers by clarifying what is expected of them and demonstrating to volunteers that the organization values their role.

Elements of a Job Description

Job descriptions should provide the following information:
- Job title
- Program description
- Purpose of the assignment
- Specific responsibilities
- Detailed description of tasks
- Expectations for training and supervision
- Reporting/paperwork requirements
- Time commitment
- Qualifications

A sample job description is included in the CD-ROM Toolbox.

Step 8: Design Your Evaluation

The most effective program evaluations are designed before a program even begins. Having your evaluation in place at the start will enable you to assess the changes that take place over the course of the program. You also want to be able to document program implementation. See Chapter 11: Evaluating Your Program for more information.

SPECIAL CONSIDERATIONS IN PLANNING INTERGENERATIONAL PROGRAMS

As you go through the general program planning steps discussed above, you should also consider some special issues that often affect intergenerational projects in particular. These include cultural awareness, staff qualifications, liability concerns, transportation, scheduling, and staff turnover and leaves of absence.

Planning a Culturally Appropriate Program

If you are interested in developing an intergenerational program that addresses the needs of a specific ethnic group or seeks to foster understanding among culturally diverse groups, the following guidelines will help you frame your planning process.

Examine Your Own and Your Agency's Level of Cultural Sensitivity

Understanding how your cultural beliefs and values influence your attitudes and behavior will help you develop programs that are appropriate for the groups you'll be working with.

Learn About the Structure and Characteristics of the Communities You Want to Work With

It is important to remember that no cultural group is homogeneous; each is characterized by great diversity, based on differences in socio-economic status, age, gender, education, language, length of time in the United States, whether urban or rural, immigration status, country of origin, and degree of assimilation and acculturation. Talk to both informal and formal leaders in order to better understand a community's dynamics.

Questions to ask include the following:

- How comfortable would older family members feel receiving care from someone outside their family?
- What kinds of rules exist regarding children's participation in after-school or evening activities?
- What are the norms of interaction between adults and children?
- How does one show respect for authority figures?
- What are people's beliefs concerning the prevention, diagnosis, and treatment of disease (both physical and mental)?
- What kinds of helping activities occur naturally within this community (e.g., caring for grandchildren)?

Recognize Differences in Verbal and Non-verbal Communication Patterns

Individuals may feel more comfortable expressing their emotions openly in some communities than in others. The level of formality and one's own comfort with self-disclosure are other issues that vary across cultures.

Questions to ask include the following:

- What are the norms related to social distance and body space?
- What topics are taboo or inappropriate to discuss with strangers?
- Is direct questioning of leaders appropriate?
- How important is "small talk" at the beginning of a conversation?
- How is silence viewed and/or used in this community?

Planning for a Qualified Staff

Because intergenerational programs are designed to bring together diverse populations, they are most effective when implemented by people who have collective expertise with all involved populations. Staff members should also be able to model the qualities you want program participants—both young and old—to exhibit. They should be respectful, caring, nurturing, and able to demonstrate that they value, and will preserve, confidential information.

According to researchers at the University of Findlay (Larkin & Rosebrook, 2002), staff running intergenerational programs should be able to do the following:

- Draw on the knowledge of human development across the lifespan

- Recognize the need for and employ effective communication to support the development of intergenerational relationships

- Understand and demonstrate a commitment to collaboration and partnership

- Integrate subject matter from a variety of relevant fields, including psychology, sociology, history, literature, and the arts, into programs

- Employ appropriate evaluation techniques to inform program development

- Be reflective, caring professionals who bring young people and older adults together for their mutual benefit

It may be difficult to identify one person who has all of the knowledge, skills, and attitudes described above. Instead, try to develop a team that encompasses these qualities collectively. Individual members who lack expertise in a particular area should be willing to seek help from others and receive training, as needed.
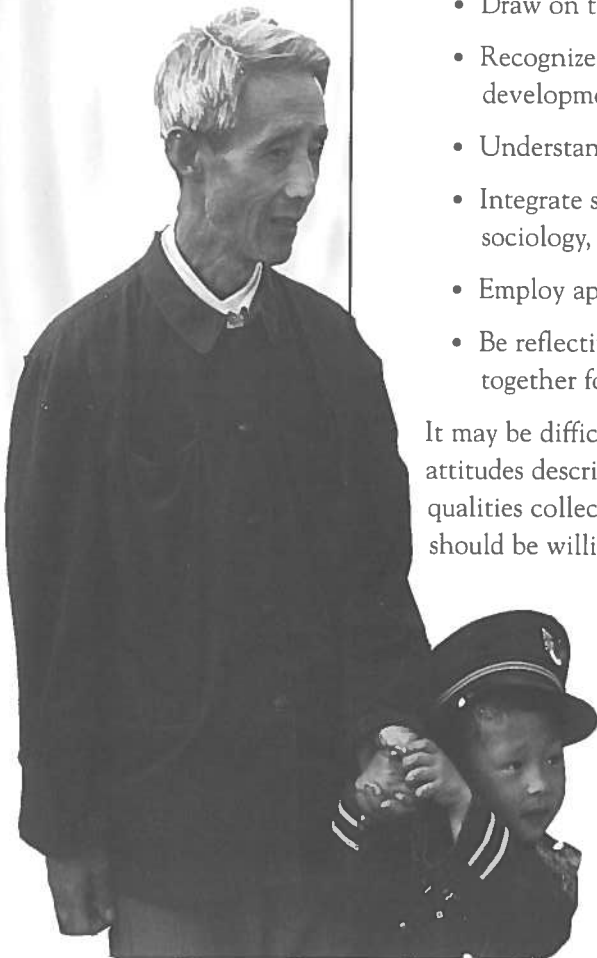
Planning to Avoid Liability Problems

When organizations begin program planning, the subject of liability invariably comes up. Organizations want to know whether they will be held responsible and accountable for injuries to participants or for actions of volunteers. Most nonprofit organizations have risk management advisors; don't hesitate to consult with them if needed. If your organization doesn't have a risk management specialist, consult with the organization's attorney or insurance agent. Two common concerns are identifying who will be responsible for which categories of risk, and volunteer liability, both of which are briefly discussed below. (The Resources section at the end of this chapter includes Web sites with more in-depth information regarding nonprofit risk management and volunteer insurance.)

Determining Responsibility

Your collaborating partner organization may already have liability coverage that can be applied to your program. For example, most schools, long-term care facilities, senior centers, and universities have insurance to cover injuries to visitors. Consult with the risk management advisors from both organizations to explore possible areas for risk, what coverage you both have, and what you need.

Volunteer Insurance

Volunteer insurance addresses three circumstances:

- The volunteer is injured in the course of doing volunteer work.

- The volunteer is named in a lawsuit against the program.

- The volunteer is in an automobile accident while transporting program participants.

To protect volunteers, you can see whether their personal car insurance provides any coverage, include them on the organization's insurance policy (as staff), or purchase separate policies that cover volunteers. One commonly used insurance is CIMA's Volunteer Insurance Service, which provides low-cost supplemental medical insurance, personal liability insurance, and excess automobile insurance for volunteers. Volunteers recruited through RSVP (the Retired and Senior Volunteer Program) are covered through CIMA.

Transportation Planning

Managing transportation is a frequent challenge for intergenerational programs, since children don't drive, and many older adults do not own cars or prefer to limit the amount of driving they do. If possible, try to bring together groups who live, work, or go to school within walking distance of one another, or who have easy access to public transportation. If this is not feasible, it is easiest—though more costly—to provide your own transportation. Again, remember to consult with your liability advisor about relevant insurance issues. Here are some tips for dealing with transportation challenges:

- Find out if one of the youth partner organizations owns buses or vans that can be used for field trips or to transport volunteers.

- Use long-term care, retirement community, or senior center vans to transport children. Make sure that you have proper insurance coverage and written parental permission. Consider what to do when these vehicles are being used for other purposes, such as when they're needed to take people to medical appointments.

- Ask older teens, college students, and adult participants to drive themselves to programs. Reimburse them for mileage and parking.

- Encourage older students to take public transportation. Some communities give discount fares to students. If you have groups of students using public transportation, make sure to provide adequate supervision and written information for each child about the route they are taking. Also, make sure that each child knows how to get in touch with group leaders in the event that any of them get separated from the group.

- If your program involves long-term care residents, consider transporting residents to where the young people are. While this may be logistically complicated, residents often enjoy a change of scenery.

Planning Workable Schedules

Scheduling challenges arise when you bring together two groups with fixed schedules, such as school children and senior center members. Students usually have to fit intergenerational activities into a class period; older adults often have regular programs that they attend. The following strategies may help you overcome scheduling roadblocks:

- Ask school and senior organization administrators for help in modifying schedules. For example, teachers who work in teams may, with permission from their principals and the consent of colleagues, schedule activities that span two class periods.

- If fixed mealtimes make scheduling difficult, have youth and older adults eat together.

- Encourage older adults to avoid scheduling other activities during program time. Remind them that they are important to the children.

Planning for Staff Turnover and Leaves of Absence

Staff turnover can be disruptive, and it sometimes causes programs to end altogether. In addition to being problematic for the organization, it can be very upsetting to participants, who are left without an infrastructure to facilitate their interactions. Here are some suggestions for helping your program endure these changes:

- Build your partnerships between organizations, not individuals. This is one of the most important reasons for having a written contract or letter of agreement, signed by administrators from all participating organizations.

- Designate a back-up liaison.

- Get buy-in from multiple staff members from all participating organizations. The more people who are involved, informed, and enthusiastic, the less vulnerable your program will be to the loss of a key person.

- Incorporate program responsibilities into staff members' job descriptions and allocate enough time for them to complete their designated assignments.

In Closing

Planning an intergenerational program can be a fun, creative process. While harnessing that creative energy, use the planning processes laid out in this chapter to help you focus on designing activities that meet your program goals and that have an adequate structure in place for successful implementation. Realize, though, that your plan is just a starting point. The one thing you can predict is that unpredictable events will happen. Flexibility is key when the time actually comes to implement your program.

IN THE **CD-ROM Toolbox**

- **Blank Logic Model with Instructions**
- **Budget Worksheet**
- **Sample Volunteer Job Description**
- **Program Planning Tools**
- **Pre-recruitment Volunteer Characteristic Checklist**
- **Links to Chapter 5 Resources**

Resources

The online *Community Toolbox*, a project of the Kansas University Work Group on Health Promotion and Community Development, offers extensive materials related to program planning. There are almost 50 chapters on a wide variety of topics. Most chapters include informative essays, checklists, summaries, and tools. Given the variety and usefulness of the materials, we recommend that you browse the Web site for topics of special interest to you. http://ctb.ku.edu/.

The *CIMA Web site* includes information about and applications for CIMA Volunteers Insurance Service. www.cimaworld.com.

The *Nonprofit Risk Management Center* has a variety of informative materials about risk management available for free and for purchase on its Web site, www.nonprofitrisk.org.

The *University of Wisconsin–Extension Web site* provides detailed information on how to use logic models for program planning. The Web site is located at: www.uwex.edu/ces/pdande/Evaluation.

National Service-Learning Clearinghouse (NSLC) has resources to help you plan a service-learning project; some resources can be downloaded for free; others can be purchased. The NSLC is a project of ETR Associates and is funded by the Corporation for National and Community Service. Visit the NSLC at: www.servicelearning.org.

Developing an Intergenerational Program in Your Early Childhood Care and Education Center: A Guidebook for Early Childhood Practitioners. This 46-page guidebook, developed by Matt Kaplan's team at the Penn State Intergenerational Program, gives specific information about planning intergenerational activities and using older adult volunteers in early childhood settings. The full publication can be downloaded for free or a spiral-bound copy purchased at www.intergenerational.cas.psu.edu.

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Chapter 6

Recruiting and Selecting Volunteers

We are retired, vigorous adults wanting to stay involved, to help others, and to stay relevant. I think that's what we all want. And we like to do it on our own terms.
—Older adult

I feel really good after I leave the nursing home, because I feel like I've done something to change somebody else's life. I sometimes even call them on the weekend or on vacation. If I have more time, I just come by and say hi. I request the nursing home for my community service at school every time because it makes me feel really good to help somebody.
—Middle school student

B ecause volunteering is at the heart of intergenerational programs, knowing how to attract and retain quality volunteers is key to the success of such programs. Although growing interest in civic engagement has led to increased numbers of volunteers in recent years, competition among worthwhile organizations for dedicated and qualified volunteers has also intensified. Attracting and retaining quality volunteers, therefore, depends not only on your ability to create meaningful and rewarding volunteer experiences, but also on your ability to "sell" your program—and the benefits of intergenerational volunteering—to others.

This chapter describes a variety of strategies for developing compelling volunteer opportunities and recruiting volunteers, including tactics that have proven to be successful in attracting members of hard-to-reach populations. It also presents some helpful guidelines for screening potential candidates.

Civic Engagement Across Generations

Intergenerational programs usually focus on engaging one or two specific age groups as volunteers, most often older adults and/or youth. Data show that people of different ages participate in different forms of civic engagement at different rates. Keep these data in mind when designing and marketing volunteer roles to different generations:

- **Older adults,** born before 1946, are about 49 million strong in this country. While they vote in high numbers, this generation does less regular volunteering than other adults and teens do.

- **Baby Boomers,** born between 1946 and 1964, constitute the largest age cohort—slightly more than 71 million. Among all generations, Baby Boomers have the highest rate of regular volunteerism and participation in groups.

- **Young working adults,** often called Generation X, were born between 1964 and 1976, and there are 44 million of them. These adults are not quite so active in their communities as their predecessors are.

- **Teens and young adults** born after 1976 are the smallest group. There are currently almost 40 million young adults between the ages of 15 and 25. This generation has the highest rate of volunteerism, though they are more likely to volunteer episodically—for special events or over a summer—rather than taking on regularly scheduled, ongoing volunteer responsibilities.

Civic Involvement by Generations
(Keeter, Zukin, Andolina, & Jenkins, 2002)

Legend: Teens- Young Adults, Young Working Adults, Baby Boomers, Older Adults

Categories: Active in Groups, Any Volunteering, Regularly Volunteers, Always Votes
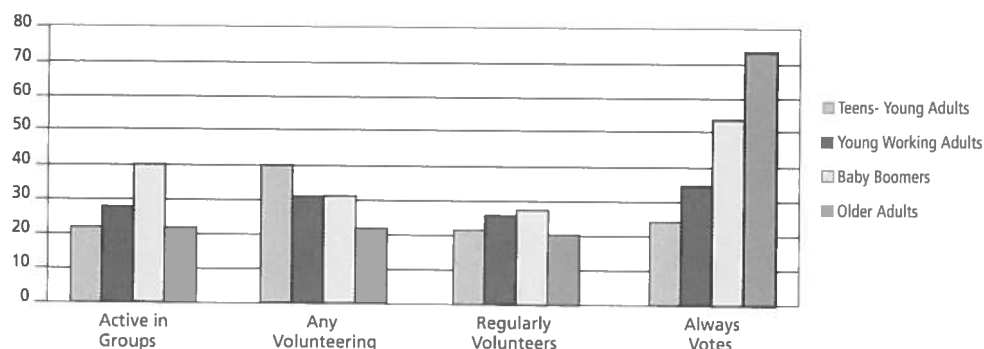
Understanding What Volunteers Want

What do intergenerational programs have to do to capture the time, experience, and interest of older adults, Baby Boomers, and young people to motivate them to serve as volunteers? Understanding what motivates people to volunteer and what different age groups want from a volunteer experience will help you design roles that both address the needs of your program and attract the population you wish to recruit.

Volunteers Want to Make a Difference. The most commonly stated motivation for volunteering is altruism: People want to feel like the work they are doing helps others, is useful, and gives something back to their community. Try to create assignments that have a clear purpose and societal value. Young people are especially interested in helping individuals on a one-to-one level. Many older adults are particularly attracted to serving youth; mentors and tutors are the most popular organization-based volunteer roles for older persons (as cited in Prisuta, 2003). Intergenerational group projects, such as neighborhood clean-ups or policy advocacy, are appealing to all age groups.

Volunteers Want Choice in What Roles and Schedules They Take On. If you are dealing with teens and college students, realize that their schedules are frequently very full with school, after-school, and social activities. Teens may also feel like other people control too much of their lives, and they are eager for some autonomy. Retirees, particularly those who recently left the work force, cherish their newfound freedom and may be reluctant to make significant time commitments. They are also coming to you with a great deal of experience and may want to have a say in how they spend their volunteer time. You can appeal to them by offering the following:

- *Flexible roles.* For many intergenerational programs, it is essential to have very specific volunteer roles, some of which involve a lengthy or regular commitment. However, you will be more likely to attract a broader base of volunteers by creating a menu of volunteer opportunities to choose from. For example, if you have a literacy program, some potential volunteers may want to do individual tutoring, while others would prefer to read aloud to groups of children. Still others may prefer to work on the program's newsletter or assist with office functions. Sometimes a volunteer will come along with great skills, though not the ones you need for the jobs you are looking to fill. Before turning that person away, see if there are other ways for that volunteer to contribute to your program.

- *Flexible schedules.* Even those volunteers who want to have a regularly scheduled volunteer position are more likely to select your program if they can choose the hours they will commit to. Many potential volunteers express interest in episodic or project-based volunteering—becoming involved with a project (sometimes intensively) for a defined period of time, anywhere from one day to several months. Others are clear that they want a regularly scheduled volunteer assignment. If a volunteer plans to travel for an extended period of time, try to find a role that would utilize that person's skills within a shorter time frame.

Think of your potential volunteers as consumers. To attract volunteers to your organization and keep them, make sure to provide great customer service!

Volunteers Want Some Ownership of Their Roles. While some people want to step into volunteer roles that are already structured, others are more motivated when they have a voice in planning their volunteer responsibilities and designing program elements. Asking volunteers for feedback on a regular basis increases their level of investment.

Volunteers Want to Feel Challenged But Not Overwhelmed. Motivated people won't stick around if assignments are boring; they'll prefer to try new things. So, if your organization receives few phone calls or visitors, you may not want to offer "receptionist" as a volunteer role—unless you can build other responsibilities into the assignment. Some assignments, such as writing for a newsletter, teaching computer skills, or developing materials in a foreign language, are suited for volunteers with specialized skills or a particular knowledge base. Other assignments, such as tutoring, mentoring, or providing respite care, require skills that are more readily taught. Some volunteers may be wary of assignments that appear daunting. Make sure that volunteers know they'll have professional support for challenging assignments.

Volunteers Want Opportunities to Have Fun and to Socialize. Volunteers are looking for opportunities that will be enjoyable, stimulating, and productive. Both youth and older adults may be looking for ways to socialize and make new friends. Be sure to build in celebrations, trips, etc. so that the volunteers and the people they work with can enjoy good times together.

Volunteers Want to Feel Appreciated. New volunteers will be attracted to your program if they see that experienced volunteers are publicly recognized. Include volunteer profiles in newsletters and on Web sites. Concrete acknowledgments, such as awards and thank-you letters, promote volunteer retention and increase the chance that your volunteers will recruit their friends to volunteer with them.

Special Considerations for Baby Boomers and Older Adults

Volunteers of all ages share some things in common when they donate their time to an organization or a cause. But research on the populations that come together in intergenerational programs shows that older adults and young people have some specific motivations for volunteering and some particular issues holding them back. Understanding these motivations and issues lays the foundation for a successful recruitment effort.

Why Do Older Adults Volunteer?

The 2003 AARP state volunteer surveys (as cited in Prisuta, 2003) asked people age 50 or older about their motivations for volunteering. Three reasons were given most often:

- The general desire to help people (67%)
- The desire to make one's community a better place (56%)
- A personal commitment to a cause or belief (54%)

Other motivators were also cited, though less frequently:

- The opportunity to learn about issues that affect people age 50 or older (46%)
- Developing new friendships (38%)
- Having fun and socializing (35%)
- Helping older people in the community (35%)
- The opportunity to use professional and leadership skills (25%)

In comparing Baby Boomers and older adults, the AARP found that religious commitment was more often cited as a motivator by older adults (42%) than by Baby Boomers (31%). However, it is important not to assume that all Baby Boomers have the same values, needs, or attitudes just because they were born within the same 18-year period.

What Prevents Older Adults from Volunteering?

In focus groups conducted with 104 older adults and Baby Boomers (Bressler, Henkin, Jackson, & Montalvo, 2004), participants described both personal and institutional barriers to volunteering. Personal barriers included the following:

- Feelings of exclusion when experiencing cliquishness or conflict among volunteers
- Stress from volunteer roles that are emotionally demanding
- Busy schedules
- Health issues
- Family caregiving demands
- Lack of confidence that they can perform volunteer roles effectively
- Lack of interest
- Preference for solitary activities, especially among men

Institutional barriers included the following:

- Disorganization among agencies that don't provide structure and support for volunteers
- Young agency staff who don't show respect for older volunteers' knowledge and experience
- Transportation issues— it's not available, or the costs are not reimbursed
- An organizational climate of disrespect—from staff and/or from those who receive service

Ensure that the mission of your organization or program is clear and compelling and that volunteers understand how they can help realize that mission.

Develop roles in which volunteers have opportunities to make use of their expertise. Remember that Baby Boomers and older adults want their work and life experience to be valued.

Organize volunteers in teams so that they can build new relationships. Retirees sometimes describe retirement as a time of lonely freedom in which they miss job-related relationships (Mark, 2004). The desire to work with others toward a common goal is frequently described as an important component of volunteering.

Enrich the volunteer experience by integrating service, learning, and personal growth. Create opportunities for retirees to learn new skills and information, reflect on the meaning of their volunteer work, and access information that will benefit them (e.g., seminars related to health education).

Offer an array of cash and cash-value (e.g., gift certificates, meals) incentives. While the importance of incentives varies among older persons, some programs are finding that as retirees become increasingly concerned about financial security, recruitment becomes more challenging. Many recent retirees and older persons are looking for part-time income. Programs that offer stipends have the easiest time attracting volunteers and therefore can be more selective about which volunteers ultimately are enrolled. At the very least, try to avoid having volunteers spend their own money: pay for their transportation, parking, food, and any supplies that are needed to do the work. Financial incentives also give you more leverage in terms of asking volunteers to comply with program requirements.

Provide opportunities for advancement by creating a leadership track for people who want to increase their level of involvement. Some leadership positions could be turned into part-time employment. See Chapter 8: Supervising Volunteers for more ideas on leadership.

ALBERT SNOOK

⟳ Volunteers with Varied Abilities

Service is not just for the healthiest younger and older people. Create a range of opportunities in which people with different levels of physical abilities can participate. Examples of successful intergenerational programs include a class of autistic teens in New York who helped deliver meals to homebound elders, and a group of nursing home residents who served as mentors to pregnant teens. Be mindful that making minor accommodations—such as holding volunteer training in a building with an elevator instead of just stairs, or putting an amplifier on a telephone receiver—enables you to broaden your volunteer base and retain volunteers who experience health changes.

Special Considerations for Teens and Young Adults

Your recruitment efforts can also benefit from research on why young people volunteer—and why they don't.

What Motivates Youth to Volunteer?

In surveys asking why they volunteer, young people cited the following (Independent Sector, 1998 Points of Light, 1994b):

- Having compassion for people in need and the desire to do something about it
- Wanting to work for a cause that is important to them
- Believing that if they help others, others will help them
- Hoping to meet other people their age
- Wanting to volunteer alongside their friends
- Seeking experiences that will enhance their applications to college
- Wishing to gain leadership and career skills
- Wanting to be productive during their free time

Keep these motivations in mind when planning volunteer outreach to younger people.

These motivations can be most effectively harnessed for volunteering when organizations take advantage of all that young people have to offer. Indeed, in a study of 1,002 people ages 15 to 29, respondents said that five factors were most important to them when evaluating their volunteer experiences (Princeton Survey Research Associates for Do Something, as cited in Points of Light, 2001):

1. Being given important responsibilities
2. Being inspired by the organization's leadership
3. Knowing what is expected of them
4. Having the chance to participate in key decisions
5. Seeing the effects of their work

> *The message from young people is that volunteering needs a make-over. It needs to improve its image, broaden its access points and provide what today's and tomorrow's young people need. Volunteering suffers from out-dated associations with worthy philanthropy and conjures images that do not appeal to the young.*
> —Katherine Gaskin, National Centre for Volunteering, United Kingdom (1998)

> *Dorothy, a school counselor, called a meeting with about 100 teens and asked them why they weren't volunteering. They replied that none of the agencies would give them anything important to do because they didn't trust them to do it right.*
> —Marlene Wilson (2004)

Findings from research done in the United Kingdom with 16 to 24 year olds were used to create the acronym FLEXIVOL to outline what young people most want from volunteering (Gaskin, 1998):

- *Flexibility:* Young people want choice in the types and timing of volunteer work.
- *Legitimacy:* Volunteering has to be seen as a valued activity. Peer pressure against volunteering is a particular factor for boys, who may feel stigmatized as providers of service.
- *Ease of access:* Learning about and applying for volunteer opportunities should be easy.
- *Experience:* Volunteering needs to offer interesting opportunities and chances to learn new skills, take on challenges, explore different careers, and get work experience.
- *Incentives:* Young people often express interest in incentives that can help them with their future careers, such as references or certification that the volunteer has completed a project or learned a marketable skill.
- *Variety:* Young people don't want to be bored. They need variety in the types of activities and levels of responsibility. Offsetting boredom can help you retain young volunteers.
- *Organization:* Young people want organizations to be efficient but informal. They want to feel like people their age are welcome and appreciated. They want to be supported but not over-supervised.
- *Laughs:* Having fun and socializing are important parts of the volunteer experience.

What Prevents Youth from Volunteering?

According to the Points of Light Foundation (1994c), there are several reasons that young people don't get involved in service:

- No one asked them.
- They don't know how to get involved.
- They lack free time and have other commitments.
- They aren't interested in or feel uncomfortable with an issue.
- They lack transportation or other support services.

TIPS FOR INVOLVING YOUNG PEOPLE AS VOLUNTEERS

- Work with youth groups, voluntary organizations, religious institutions, student government, and schools to recruit children and teens.

- Cultivate opportunities for youth to teach and lead.

- Involve youth in meaningful decision-making and planning activities.

- Utilize young people as recruiters and give them control over the way they recruit.

- Promote strong youth-adult partnerships as part of your program.

- Market your program as an opportunity to meet people from diverse backgrounds.

- Try to match volunteers' interests and abilities to the tasks they are asked to do.

- Be specific and concrete in your recruitment message—provide examples of what a volunteer might do.

- Focus on the benefits to the young person (e.g., gaining new skills, making new friends).

- Make sure that there are plenty of opportunities for fun and socialization!

Family Influence

Engaged parents tend to raise engaged children.
—KEETER ET AL. (2002)

Well, I was raised in a family that said, "Leave the world in a better place than when you found it." And my goal in life is to achieve some betterment of society, I guess.
—OLDER ADULT VOLUNTEER

Research shows that—regardless of age—individuals who volunteer alongside their family members go on to volunteer on their own (Independent Sector, 2001). Encouragement by family members to volunteer and the enhanced respect that is shown to volunteers by their families further motivate and reinforce community involvement (Bressler et al., 2004). Parents are especially influential in developing their children's interest in community service and civic engagement (Keeter et al., 2002). To attract children or older adults to volunteer, hold intergenerational family volunteer events that involve all generations. People will be more motivated to participate if their loved ones are participating as well.

A Caveat: Remember What You Need from Your Volunteers

While this chapter has thus far underscored the need to be flexible and to acknowledge the desires of volunteers in order to successfully recruit them, you don't want to be so flexible that you sacrifice program continuity or quality. It is a good idea to go back to the job description you wrote during the planning process (see Chapter 5) to remind yourself of your specific volunteer needs before you move forward with a plan to let potential volunteers know about your program.

CREATING YOUR APPEAL TO VOLUNTEERS

Structuring your volunteer opportunities so that they are meaningful and attractive to the youth and older adults you wish to recruit is important, but it won't in itself help you enlist volunteers. People have to have some way to find out about the unique opportunities your program has to offer. Knowing the language, materials, and approach that will appeal to the groups you wish to recruit will help you spread the word.

Understand Your Target Audience

Some lessons learned from the field of marketing will help you figure out the best ways to capture the attention and interest of the younger and/or older people who make up your target audience. In *Defining Markets, Defining Moments*, Meredith and Schewe (2002) identify seven distinct generational "cohorts" (groups of people who went through an important stage of life at approximately the same time). Based on the premise that shared experiences (e.g., wars, assassinations, economic upheavals) help shape a cohort's long-term values, the authors contend that evoking "coming of age" experiences through words, symbols, and memories is a subtle way to tap into the values of the group you are targeting. The following are some tips for marketing to each of the generational cohorts that Meredith and Schewe describe (adapted with permission from the authors). These tips apply to generic marketing; think about how you can capitalize on the values described to recruit members of these cohorts to your intergenerational programs. Remember, these tips may have to be adapted when race, ethnicity, and socio-economic status are taken into consideration.

Depression Cohort (born 1912-21)

This cohort strongly values a sense of purpose, safety and security, and social connectedness.

- Emphasize social companionship
- Emphasize valuing experiences, rather than "things"
- Focus on gaining independence and control over one's life
- Depict the importance of family
- Emphasize the opportunity to take pride in one's skills

World War II Cohort (born 1922-27)

This cohort strongly values patriotism, romance, self-reliance, and respect for authority.

- Use nostalgia to remind them of their youth
- Emphasize giving back to society
- Focus on enjoyable activities, and don't depict situations that imply danger, harm, or risk
- Show photos or videos of people their age participating in group activities

Postwar Cohort (born 1928-45)

This cohort strongly values the American Dream, conformity, stability, family, and self-fulfillment.

- Appeal to their sense of (safe) adventure
- Depict them as enjoying life to the fullest, having fun
- Share stories or data about people their age experiencing a sense of fulfillment through similar volunteer experiences
- Use nostalgia-based appeals, without explicitly invoking age (remember the stigma they might attach to the word "seniors")
- Acknowledge their role as caregivers, retirees, and part-time workers

Leading-Edge Boomer Cohort (born 1946-54)

This cohort strongly values personal and social expression, individualism, youth, health, and wellness.

- Stress their desire to be themselves ("I gotta be me!")—place a strong value on individualism
- Focus on the images, icons, and music of Boomer youth
- Promote a positive self-image and feelings of attractiveness
- Appeal to their sense of community as a cohort ("We're the biggest and the best!")
- Focus on quality of personal life versus work life

Trailing-Edge Boomer Cohort (born 1955-65)

This cohort strongly values individualism, health and wellness, and family commitments; they are fairly cynical and maintain a healthy distrust of government.

- Characterize them as realistic idealists with concerns for practicality and results
- Acknowledge their need for success and their need to meet the challenges of their careers, etc.
- Appeal to overt materialism ("What's in it for me?")
- Note that volunteering might provide a sense of novelty to their lives— a chance to change and experience the unusual
- Emphasize convenience

Generation X Cohort (born 1966-76)

This cohort strongly values free agency and independence, friendships, and the pursuit of quality of life; they tend to be cynical about the future.

- Show their acceptance of cultural diversity
- Reflect their focus on and the fulfillment they get from family, rather than their jobs
- Reflect their high energy
- Depict their feelings of invincibility and fearlessness
- Show them as independent and doing their own thing

N Generation Cohort (born 1977-84)

This cohort strongly values tolerance, diversity, being a team player, and the belief that change is good; though their fears are heightened, they are generally hopeful about the future.

- Play on their generally upbeat, positive view of the future
- Use sophistication, a sense of humor, and honesty in your messages
- Focus on messages that emphasize the environment and making the world a better place to live
- Strive for a broad ethnic mix
- Acknowledge their sense of belonging to a global community

◉ Redefining Retirement

In 2001, social marketing research was conducted with retirees in several U.S. cities to learn about their experiences with retirement and what kinds of marketing messages would attract them to volunteer (Mark, 2004). Participants expressed conflicting feelings about retirement. Although many described "an exhilarating, newfound sense of freedom" and were reluctant to take on obligations that they thought might threaten their freedom. They also described "unsettling feelings of loneliness and purposelessness." They missed purposeful job-related relationships that involved problem-solving, as well as the daily shared experiences and natural camaraderie of the workplace.

The results of this research have implications for marketing volunteer positions. Rather than emphasizing the plight of the population to be served, focus on the benefits of the service – both to the volunteer and to those served. Here are some examples of messages that might attract older adult volunteers:

Life is a continuing journey, with never-ending possibilities to learn, give, and grow.

New bridges are being built—from generation to generation, from skill to need, from interest to opportunity. We all need to be part of that process.

Your experience, wisdom, and talent are needed and will be valued.

Your freedom and autonomy will not be compromised.

You know what you have to offer. We can help you find an outlet.

You're really going to enjoy yourself!

Experiencing the unique satisfaction of "relationships with a purpose" need not be gone from your life forever. You have another chance.

Develop a Creative Brief

After reviewing or conducting research about your target group, it is helpful to develop a creative brief—a one- or two-page summary of your research and goals that can provide guidance in developing the primary messages that will be communicated in your marketing materials and in all verbal presentations. A creative brief has four sections (Waldman, 2004):

- *The audience you want to reach.* Ask: "Who are we talking to? Who are we hoping to recruit?"
- *The current relationship that this audience has with your program.* Ask: "What are they thinking, feeling, and doing right now?"
- *How you'd like that relationship to change as a result of your communication.* Ask: "What do we want them to think, feel, and do in the future?"
- *What you can say to make that change happen.* Ask: "What insights have we gained that can help us recruit these volunteers most effectively?"

Using the "redefining retirement" research discussed above, the following creative brief was developed to help the Westchester RSVP, a clearinghouse for senior volunteers, enhance its recruitment efforts.

Westchester RSVP's Creative Brief

Who are we talking to?

Prospects are adults who are retired or semi-retired. They claim to be "loving" retirement. But deep inside, they feel a kind of unsettling purposelessness. They try to compensate by making themselves available to friends and family, or taking on a hobby or two, but they still don't feel as content and happy as they thought they would.

What are they thinking, feeling, and doing right now?

Here is a typical response: "It would be nice to do volunteer work, I guess, but I've worked hard all my life, and I think I deserve to just do the things now that will make me happy. Anyway, at this point, I don't want to make any big commitments."

What do we want them to think, feel, and do in the future?

This is a response we'd like to get: "RSVP, right here in Yonkers, offers a lot of different ways that I could volunteer some of my time. Judging by the people who are already doing it, it looks like fun. I just might give them a call and find out more."

What insights have we gained?

People who volunteer do so not only for the good it does for others, but also for how good it makes them feel.

(Waldman, 2004)

Based on this creative brief, marketing professionals developed the following tag line:

Volunteering. Think of it as a face-lift for your spirit.

In Fall 2002, this message, printed underneath photographs of radiant and diverse older adults, was put on direct-mail postcards, flyers, billboards, bus posters, and ads in local newspapers. Ads were posted for three months, three wellness and volunteer fairs were held, and three mailings were done over a year's time. RSVP received 456 inquiries and successfully placed 148 volunteers in the first year of the campaign, increasing its volunteer base in Yonkers by almost 40%. In addition to contacting RSVP, many people in the Yonkers area were inspired by the campaign to directly contact organizations for which they wanted to volunteer.

The marketing research and the Yonkers RSVP campaign were part of an initiative funded by the Helen A. Benedict Foundation. The slogans that resulted from this project are not copyrighted and may be used or adapted by any organization or community that wishes to recruit older adult volunteers. The photograph, however, may not be reproduced without purchasing the rights from Getty Images (www.gettyimages.com). You are welcome to substitute images that you already own.

VOLUNTEERING.
THINK OF IT AS A FACE-LIFT FOR YOUR SPIRIT.

FOR VOLUNTEER OPPORTUNITIES IN YONKERS CALL RSVP (TOLL FREE) AT 1-866-VOL-CALL.

Funded with the generous support of the Helen Andrus Benedict Foundation.

Develop Quality Materials

Every encounter you have with a potential volunteer should be accompanied by a handout, brochure, or leaflet describing your program or organization. Use your creative brief to help you determine the messages that you want the materials to convey. Print and other media materials should reflect the feel and quality of your program and convey a sense of professionalism. Use attractive graphics that capture the reader's attention, and make sure to display your organization's logo prominently. Other ideas for developing quality materials that can enhance your recruitment efforts are suggested below.

Include Your Target Population in Materials Development

Hold focus groups to shape the format and content of your materials, and have representatives from your target audience review product drafts. This will increase the likelihood that your materials are culturally and age-appropriate and that they will appeal to the groups you want to attract.

Choose Your Words Carefully

Use language that is familiar to your target audience, and avoid professional jargon. Make sure that text is written at an appropriate reading level. Do not use age-related labels that may turn off your target audience. Realize that people age 50+ have mixed response to age-related labels and to the word "volunteer." While many embrace being called a "senior citizen" or "older adult," others clearly perceive these terms as pejorative and are insulted by their use. Similarly, while some feel honored to be called "volunteers," as this word suggests that one's labor is freely given, others feel like the word "volunteer" implies a lack of value in their efforts. Acknowledging the varying attitudes and being sensitive to people's preferences will help in your recruitment efforts. If necessary, translate posters and materials into languages other than English—and be sure to have someone check the translation!

Use Effective Photographs and Narratives

Your graphics and text should convey excitement, hope, and purpose, such as moving and upbeat quotations and stories from experienced volunteers and satisfied clients. Avoid images or stories that are gut-wrenching or discouraging. Include photos that reflect the diversity of your volunteer pool.

Make Sure that Your Message Is Clear

Materials designed for recruitment purposes should do the following:

- *Sell the organization*. Volunteers are attracted to successful organizations that have stature in the community.
- *Sell the problem*. Volunteers want to feel like their work is serving a purpose and their time is being well-spent.
- *Define expectations*. Volunteers want to know what they will be doing and how much time it will take.
- *Describe available training and support*. Volunteers should know that they will not be left on their own to tackle challenging assignments.
- *Sell the benefits of volunteering*. These can be both concrete and more intangible and personal. Tangible benefits include things like stipends, expense reimbursement, and school credit. Personal rewards include the satisfaction of providing service, making new friends, and learning new skills.

To get ideas for language and images that are likely to resonate with youth, explore the World Wide Web. Youth-focused Web sites, such as www.americaspromise.org and www.youthnoise.com, are designed to be read by young people and to inspire their interest in civic engagement.

Be Prepared for the Response

The last thing you need is to follow a successful marketing campaign with a disorganized response to the interest that is generated. If potential volunteers contact your organization and are not impressed by how they are received, then you can count on not hearing from them again. Moreover, they may spread the word that this is not a good place for volunteering.

Pre-Recruitment Checklist

Review this checklist before you begin recruiting (adapted from the Texas Commission on Volunteerism and Service, 1998):

- ✔ Staff are prepared to assist in interviewing, screening, orienting, training, and supervising volunteers.
- ✔ Everyone is fully trained and knowledgeable about their role in volunteer placements.
- ✔ Volunteer materials have been developed and produced.
- ✔ There is a place for volunteers to work.
- ✔ Policies, procedures, and record-keeping systems are in place.
- ✔ Legal and liability issues pertaining to volunteer involvement have been resolved.
- ✔ Volunteer recruiters can speak knowledgeably and enthusiastically about the mission and work of the organization.
- ✔ Systems are in place for evaluating the performance of volunteers and the outcome(s) of volunteer initiatives.
- ✔ A volunteer supervision system is in place.

READY TO RECRUIT

Once you're ready to receive volunteers, you can begin recruitment. This section presents a variety of suggestions for identifying and recruiting potential volunteers. The methods you use will vary, depending on the population of volunteers you want to reach, the nature of the volunteer assignment, and the resources available to you. Try to combine two or more recruitment methods, as it's unlikely that one approach will yield all the volunteers you're looking for.

⦾ Group Recruitment

There might be times when you are looking for an intact group, such as an entire classroom or a church men's club, to take on a project. In these instances, the first person to win over is the teacher or a leader in the club. Ideas for forming partnerships with representatives from other organizations are presented in Chapter 4: Creating and Sustaining Outside Partnerships. Regardless of whether you're hoping to involve individuals or groups, the overall strategies are similar. Individuals will often be found through existing community-based groups. Ultimately, you will need to look beyond group leaders to achieve buy-in from all potential participants.

Identifying Volunteers

The first step in recruitment is figuring out where to find the volunteers you are looking for.

Cast a Wide Net

There is no one place to find volunteers. The more organizations you contact, the better your chances of recruiting a diverse, committed group of individuals. Think of multiple and varied locations for finding potential recruits. This is especially important if you need to recruit large numbers of volunteers.

Contact Organizations

Frequently, organizations can provide multiple volunteers. Think about senior centers, churches, or Scout troops as potential sources. Form partnerships with each organization's leadership, so that the organization is contributing volunteers to your effort—otherwise, it may look like you are "stealing" their members! (See Chapter 3 for more suggestions of organizations that work with older adults or young people.)

Expand Your Networks

Contact organizations that are outside the usual social service and educational networks, such as faith-based organizations, service groups (like Kiwanis International or the Masons), or interest-related clubs (such as music or foreign affairs societies). Many of these organizations meet in the evenings and on weekends, so you may need to be flexible when scheduling presentations.

Contact professional associations if you're looking for people with very specific skills, such as retired scientists who could work with students to inspire their interest in careers in science.

Cover Your Area

Concentrate your search in the area where the volunteer activity will take place. Begin by contacting nearby organizations, then get creative! Visit popular gathering places, such as coffee shops, bowling alleys, gyms, and parks. To reach older adults, consider placing materials in health centers and medical offices.

Ask Colleagues for Help

Enlist everyone connected to the program—staff, volunteers, board members, trainers, and consultants—as assistant recruiters. They've all seen the organization at work and can, with prompting, translate their enthusiasm into recruitment. Assign them "doable" tasks, such as talking to three friends about the project or recruiting one volunteer to participate.

Also call professional acquaintances, particularly those who work in social service agencies or have connections to your desired group of volunteers.

Aim for High Numbers

Expect to have contact with many more people than will ultimately become volunteers. Assume that among those who initially express interest in your project, some will not follow through, a significant portion will not meet your criteria (especially for more sensitive assignments), and a portion will drop out during or after training. It is not unreasonable to sign up at least two to three times the number of volunteers you ultimately will need.

Making the Invitation

Once you've found your potential volunteers, it's time to let them know what you have to offer—and what they can offer you. As the story in the sidebar illustrates, successful recruitment requires thoughtful planning, the building of relationships, and, in some cases, a great deal of finesse.

People are not likely to come to you on their own to volunteer—you need to ask! Surveys consistently reveal that many people do not volunteer because no one ever asked them to. In one study, 93% of youth who were asked to volunteer then did so, as opposed to 24% of teens who were not asked. Among people age 65 or older, 84% of those asked to volunteer did, compared to 17% who volunteered without being asked (Independent Sector, 1998 and 2000).

A variety of recruitment methods are discussed below. In developing your strategy, think about how you might combine methods to maximize the effectiveness of your efforts.

One-to-One Contact

The most effective way to recruit volunteers is through personal invitation—people are simply more apt to say "yes" to people they know. If your project is just beginning, look to staff, board members, and clients to recruit their friends. If your project is already underway, then satisfied volunteers may be your best shot—they'll tell their friends about the wonderful time they are having, and their friends won't be able to resist signing on!

We hired an older African American man to recruit mentors because we especially wanted to enroll African American men. He began by getting to know people at strategic locations near the schools where the mentors would be working, such as a senior housing complex, senior center, and church group. He'd go back each week, picking out those few people that he'd talked to the week before. He actually didn't give his pitch until the third or fourth week—by which time he'd really gotten to know people and become friends with them. In a few months time, he'd managed to recruit about 35 people—all the mentors we needed.
—Program director

Who Recruits

Whenever possible, the recruitment team should include people who are the same gender and ethnicity and the approximate age of the people they are trying to recruit. If your staff does not share these demographic characteristics with the audience, consider offering a stipend to current volunteers or paying people from the community to work as recruiters along with staff. An intergenerational team of recruiters who have been through the program together can be especially powerful.

Peers can also be persuasive recruiters. For example, at the Martins Run Retirement Community outside Philadelphia, a small group of residents wore mysterious badges designed to spark interest in a special, weekend-long intergenerational event. The badges, which read either "Ask Me," "Did You?," "What?," or "Sign Up," created such a buzz around the facility that more than 100 residents participated in the weekend event.

Targeted Mailings

These are recruitment letters to groups of people who are sympathetic to your cause or more likely than the average person to volunteer, such as members of a local service club or students at a nearby university. Approach your state or local AARP chapters to explore the possibility of sending program information to specific geographic areas, or ask local legislators if you can send recruitment postcards to their constituencies or publicize your program in their newsletters. Letters should be endorsed by the group's leadership and (if possible) written on the group's letterhead. It may take a very large mailing to generate a substantial response. Consider sending repeat letters several times to maximize your response.

Mass Media

Mass media campaigns tend to be most effective when you are looking for large numbers of volunteers over a long period of time. Mass media can establish your visibility and credibility in the community and provide a foundation on which you can build direct recruitment efforts. There are two broad categories of mass media: print and broadcast. Some examples of print media are local or regional newspapers, billboards, posters, and leaflets. Broadcast media includes radio and television. Costs associated with using mass media vary considerably. Announcements in local papers are often free, but developing a quality public service announcement for video can be expensive. Feature stories in local newspapers or magazines are a fantastic, and inexpensive, way to strengthen the public image of your organization and programs. Copies of these articles also make great handouts at volunteer recruitment presentations. Similarly, radio and television interviews can be an effective way to draw attention to your program and volunteer needs. If you are considering launching a more comprehensive mass media campaign, first consult advertising professionals.

Information Tables at Public Events

Choose events that will have a large turnout or where the audience is likely to be interested in volunteering, such as community service fairs at nearby colleges and universities, hospital health fairs, senior citizen expositions, or special community events.

Internet Postings

There are many ways to use the Internet to let people know about volunteer opportunities. Young people are prolific Internet users. Internet use is growing faster among those age 55 or older than among any other age group (Pastore, 2000). If your organization has its own Web site, consider a flashing signal on your home page that draws visitors' attention to a volunteer link. If you have an electronic mailing list, use it to disseminate job listings. You can also post available positions on specialized volunteer Web sites designed for recruitment purposes. These sites contain extensive databases of volunteer postings, which potential volunteers can search using specific criteria, such as zip code and job title. (See the Resources section at the end of this chapter for a listing of some of these Web sites.)

Because young people are so facile in their Internet use, think about how you can use the Internet to increase interest in an intergenerational topic or in intergenerational volunteering. Examples include a class assignment of searching the Internet for local volunteer opportunities in which youth work alongside older adults, and asking students who will be working for a meals-on-wheels program to do research on aging and nutrition.

When to Recruit

Timing can make or break your recruitment efforts. When developing a recruitment plan, remember the following:

- Certain times of year are better for recruitment than others. Early autumn is best for recruiting students and older adults to participate in school-based programs.
- Minimize the amount of time between recruitment and program start-up.
- Make recruitment an ongoing part of your program activities. Attrition in all volunteer programs is normal. Ongoing recruitment will help to ensure that you have the volunteers you need.

TIPS FOR DELIVERING AN EFFECTIVE RECRUITMENT PRESENTATION

Learn about your audience before you arrive. Learn about the group's interests, previous involvement with other generations, concerns they might have about volunteering, the expected audience size and amount of time allotted for your presentation.

Let people see how their participation will make a difference. Use videos, success stories, photographs and evaluation assessment material to illustrate the social problems that volunteers will address and how they can help.

Use an intergenerational team to recruit volunteers. There is nothing more powerful than witnessing, in person, an effective intergenerational relationship that resulted from the program. Ask an intergenerational team to talk to a group about what they gained from the program. Describing how they overcame initial challenges will help to alleviate some of the reticence that audience members may have about becoming involved.

Bring along an experienced volunteer to share his or her experiences. Make sure the volunteer is enthusiastic and able to articulate the benefits of volunteering.

Explore attitudes toward other age groups and discuss the value of overcoming age-related stereotypes. The CD-ROM Toolbox has exercises to help older adults and youth discuss how they feel about other generations, how their own generation is misunderstood, and explore how fears and negative stereotypes can be overcome.

Address identified concerns. For example, if you sense that your audience lacks the confidence to take on a challenging assignment, share a success story about a volunteer who overcame his or her fears. (Better still, have that volunteer there to tell the story!) If many audience members don't have cars or like to drive, talk about transportation options. Address fears about safety by describing the training and security procedures the program provides.

Devise ways for potential volunteers to put their toes in the water. Invite volunteers to a special event where they can informally meet the people they'll be working with. You can also ask potential volunteers to do a short-term task After they become acquainted with your program and the population served, they may be more interested in committing to ongoing or more intensive volunteer roles.

Involve your audience. Ask questions, such as: How many of you have ever known an older person with a disability? How many teens in this city, would you guess, can't read a newspaper? Engage the audience in a brief activity—perhaps one you use in your trainings. Make sure to leave ample time for questions.

Show a short and motivating video. The 15-minute video *Connecting Generations, Strengthening Communities* was especially created to stimulate interest in intergenerational participation among people of all ages. The Generations United Web site (www.gu.org) lists videos available from a variety of programs all over the country.

Be concise. Try to keep your presentation short. Show your potential volunteers that you value their time.

Distribute materials that people can take home. These should include volunteer job descriptions, flyers or posters, application forms, general agency literature, and copies of any news articles about the project. Also, give people something to remember you by, such as a pencil, or key chain with your logo.

Allow time to interact informally with the audience. If refreshments are available, people will be more likely to stay and talk.

Never walk away from a meeting without getting the names and numbers of people who seem interested. Always circulate an attendance sheet. If possible, ask people who you know are interested to complete applications on the spot. Be sure to get back to interested applicants within a week.

Follow up with a letter, telephone call, or second visit. Sometimes people need to sit with an idea before it takes hold. You may need to visit a site two or more times before identifying potential recruits.

Recruiting Specific Populations

Sometimes the goals of your program will be met more effectively if your volunteers share certain characteristics. For example, mentoring programs are generally more successful when the youth and adults are the same gender and ethnicity. You may also want to ensure that you have diversity among your volunteers. In these instances, you will want to do more targeted recruitment.

Recruiting Older Adults of Color

AARP's recent Multicultural Study (cited in Prisuta, 2003) found that while most people age 45 or older volunteer because of a sense of personal responsibility and personal satisfaction from helping others, there were also variations in volunteering patterns across ethnic groups.

African Americans age 45 or older are most likely to focus their community service efforts on the following:

- The needs of homeless and hungry people
- Advancing the rights of minorities
- Efforts sponsored by their religious organizations
- Efforts taking place in their neighborhoods
- Tutoring and mentoring

Asian Americans age 45 or older are most likely to be working full-time and have college and graduate educations. Findings about their community participation include the following:

- The number of Asian Americans who work to advance minorities' rights is higher than that of other ethnic groups.
- Asian Americans are the most likely of the 45+ crowd to volunteer on an occasional basis rather than regularly, but they volunteer an average of 15 hours a month, equally as much as the average of all adults age 45 and up.

Hispanic Americans age 45 or older (nearly half of whom, of those surveyed, were born in other countries) give the most time to individuals and organizations than any other ethnic group:

- They are the most likely to provide volunteer help to other immigrants.
- They report an average of 22 hours per month of community service

Consider these factors when planning recruitment of older adults of color:

1. African American and Latino adults are more likely to volunteer with organizations that are run by, or primarily serve, members of their own communities. If your organization meets neither of these criteria, consider collaborating with one that does. Also consider hiring visible program staff who are people of color.

2. Within some populations, it may be difficult to find older adults who speak fluent English. Try to create opportunities suitable for both English and non-English speakers, such as storytelling in a bilingual classroom.

3. Religious organizations are often central to the lives of community members. As such, they can be a valuable resource for understanding and working with volunteers of color. For example, churches within the African American community have historically supported a spectrum of health, education, and social service programs for community members. Consider having a church, temple, or mosque "adopt" your program. This unofficial "stamp of approval" will increase your program's credibility within the community and help you attract volunteers.

4. Definitions of "elder" sometimes vary across cultures. Such factors as life expectancy, when people typically become parents and grandparents, the average age of retirement, and the role of grandparents in the family all shape community perceptions of aging and their ideas of when, exactly, a person gains "elder" status. Make sure that your definition of "senior" matches those of your target community —if your minimum age for volunteering is 55 but the community defines "elder" at 50, you may miss out on many potential recruits.

Recruiting Men

Motivating men to volunteer in intergenerational programs can be challenging. Men are less apt to volunteer, overall, than women, and are often discouraged from having contact with children. Older men, in particular, may find it difficult to imagine themselves playing the role of "nurturer." Successful recruitment of male volunteers is likely to require extra effort and sensitivity from program staff. Here are some ideas for recruiting men:

Highlight the important role that male volunteers can play as mentors and role models. Today's youth have less contact with fathers and adult male figures than any other generation in history. Older men, in particular, often have special insight into the challenges of becoming, and being, an adult male.

Emphasize that volunteering is an opportunity to pass on their knowledge and experience. This is particularly important to those men whose identities were closely connected to their jobs.

Target all- or mostly male groups, such as fraternities, veterans organizations, and clubs, such as Kiwanis International, the Masons, and the Elks. Contact retiree groups and professional associations from traditionally male fields, such as auto servicing, construction, and engineering.

Include men in your recruitment team. Male recruiters tend to have more credibility discussing the role of men as volunteers and are likely to engender more comfort among men than female recruiters.

Include photos of men in your promotional materials. Some men may be reluctant to volunteer if the only pictures they see are of women. Seeing other men in the materials will help male readers envision themselves in a volunteer role. It also lets them know that other men are already on board.

Once males do volunteer, team them up with other men. When conducting trainings or holding meetings, make sure that no man is assigned to a group where he is the only male. Try to involve men in leadership positions so they can be seen as an integral part of the staff.

Recruiting Retirement Community and Long-Term Care Facility Residents

Volunteerism doesn't need to stop when a person enters a retirement community or long-term care facility. On the contrary—volunteering can provide residents of these institutions with a sense of purpose and connection they might otherwise miss. Here are some ideas for recruiting volunteers from these settings:

Whet residents' appetites by holding a one-time, interactive event with young people. This will give residents a taste of what it would be like to participate in an intergenerational program. Begin recruitment for a more in-depth program soon afterward.

Announce the program at a residents' council meeting or other widely attended event. Ask those in attendance to spread the word. Also, advertise the project on a central bulletin board. Follow up by approaching residents individually.

Emphasize what residents can offer young people. If they voice a concern that they have nothing to offer, remind them of their strengths.

Describe what young people can offer residents: affection, a fresh perspective on current events, and knowledge of new technologies, as well as surprises and fun!

Have residents who are experienced in intergenerational programs participate in recruitment. People are more likely to volunteer if they feel confident that someone "like them" can do the job.

Encourage residents to attend an initial meeting, after which they can decide if they want to continue.

Selecting Volunteers

After spending considerable time and energy looking for volunteers, you may be tempted to put to work any or all who appear at your door. Don't do it! Careful selection is the key to building a team of volunteers who will work well together and help you meet your project goals. It may feel strange to "reject" someone who is offering to volunteer his or her time. Just keep in mind that it is far easier to screen up front than to ask someone to leave down the line.

The extent to which you screen prospective volunteers will depend on the needs of your project. It is generally good practice to have prospective volunteers complete an application form and participate in a face-to-face interview prior to being enrolled. There are also other measures you can take to ensure that you are selecting appropriate volunteers under certain circumstances. A variety of screening options are discussed below.

Application Forms

Application forms have two uses. First, they are a good way to collect contact and emergency contact information. Second, they can help you decide which candidates to spend time interviewing. Questions related to specific job requirements (e.g., Do you have a driver's license? What times of day are you available to volunteer?) are useful for establishing whether the prospective volunteer would be a good fit for your organization. Written applications can also provide useful information about basic literacy skills. Including an inventory of each individual's skills and interests as part of the application process is an effective way to help you make use of a potential volunteer's abilities.

Interviews

Interviews are good for finding out if the expectations of the volunteer are compatible with the goals of the program. They can help you determine whether your candidate has the skills and commitment needed for the assignment. They also demonstrate that your organization values volunteers enough to give them the individual time and attention they deserve. Except when recruiting for group or class projects, interviews should be conducted with each volunteer. Interviews provide an opportunity for you to share essential information about the program and the volunteer roles, and to learn about the applicant. Remember—listen carefully to what the applicant has to bring to your organization and be open to creating new roles/assignments, if appropriate.

Interview Questions for Potential Volunteers

- What are you looking for in a volunteer experience?
- Why does this position appeal to you?
- What special skills or talents do you bring to this position?
- What related experiences do you bring to this position?
- What concerns do you have about doing this kind of volunteer work?
- What are your other time commitments?
- Are there new skills you would like to learn from volunteering?

During the interview, pay attention to your instincts. Follow up on any responses that seem confusing or at all inappropriate. If you have any doubts about accepting the candidate, conduct a second interview—perhaps with a colleague present. If you are sure that the person is not a good fit, be up-front about your decision, and present volunteering alternatives.

Pay attention to your applicant's doubts as well. If the applicant is expressing very deep reservations, let the person go—even if you think he or she would be perfect for the program. You don't want to invest a lot of time training and coaching a volunteer who is likely to drop out. Similarly, try to avoid pressuring prospective applicants to make a commitment on the spot. Let them know that you will be in touch within a few days and that they should feel free to call with questions. Make sure to thank them for their time, regardless of the outcome.

Two Screening Processes

Different programs require different screening processes. Although the two intergenerational programs described below both enlist college students to serve older adults, they involve very different levels of engagement and therefore use different approaches to volunteer screening.

In the first program, college students who volunteer to tutor older immigrants are recruited through their university classes. Extensive individual interviews are neither necessary nor feasible. According to the program's director, "Students display a range of commitment. Some are just going through the motions—they show up half the time and require more energy on the part of the coordinator than they actually contribute. Others are enthusiastic and completely dependable . . . It all balances out."

In the second example, volunteers for an in-home respite care program for the elderly participate in a lengthy, individual evaluation. As the program director explains, "I assess the candidates' sincerity and motivation because they will be going into someone's home unsupervised. I have to get a feel for the person's enthusiasm. I ask about their experiences with the elderly and what is motivating them to volunteer. It has to be more than just the $7.00 an hour. You don't travel and spend time in a frail person's home for $7.00 an hour."

References

References are typically requested for assignments that require sensitivity or in which a volunteer will be alone with someone who is vulnerable, such as a child or frail adult. For example, volunteers for in-home respite programs are typically asked to provide two references. Adults who volunteer in schools or youth settings are also routinely asked for references. When asking for references, explain that this is a routine procedure. When contacting people's references, be direct and concrete. Keep in mind that respondents may be reluctant to make negative comments, or may be forbidden by their company to make any evaluative statements.

Background Checks

Criminal record and child abuse background checks usually are required of adult volunteers who will work closely with children. They protect both the youth and the sponsoring agency. Make sure to let applicants know if and when you will be collecting this information. Explain that it is a standard part of the application process. Every state has different procedures for doing these checks. Sometimes they can be done online, efficiently and at low cost. Contact your state police or look on your state Web site to find out the procedures for your area.

Keep in mind that having a prior arrest record doesn't necessarily mean that a candidate shouldn't be hired. Consider the nature of the arrest, how long ago it occurred, and its relevance to the volunteer assignment. For example, finding out that someone was convicted for shoplifting 20 years ago may not affect your decision to hire that person as a mentor. However, finding out that someone had been convicted of a crime against a child would definitely affect your decision. In particular, a conviction for child abuse would eliminate a person for a volunteer position working directly with children.

Physical Examinations

Physical examinations are occasionally required of volunteers. More frequently, candidates are simply asked, either on an application or during an interview, whether they have they physical capabilities needed to complete the required tasks. Having a physical disability should not automatically exclude someone from participating. People with significant disabilities often function very well as volunteers; indeed, they may be particularly powerful role models. Consider how your program can be adapted to accommodate volunteers with disabilities.

In Closing

Recruiting volunteers is one of the most important and challenging tasks you will face when you implement an intergenerational program. As this chapter demonstrates, there are a variety of ways for you to approach recruiting older and younger volunteers. Review your options, then create a comprehensive recruitment plan. Careful planning and thorough implementation will be well worth the time.

IN THE **CD-ROM Toolbox**

- **Focus Group Summary Report: Understanding How Philadelphians age 50+ View Volunteerism**
- **Assess Your Offering: Elements of Compelling Volunteer Opportunities**
- **Sample Questions for Volunteer Applications and Interviews**
- **Volunteer Recruitment Plan Checklist**
- **Links to Chapter 6 Resources**

RESOURCES

Appealing to Experience: Zeroing in on the Right Message, published in 2005 by Civic Ventures/ Experience Corps, is a 40 page booklet on recruiting older adult volunteers. It includes background information, suggested marketing strategies and great looking sample advertisements. The booklet can be ordered on line or downloaded for free from http://www.experiencecorps.org.

The *Learn and Serve America National Service-Learning Clearinghouse* (www.servicelearning.org/index.html) is a Web site that provides extensive resources for planning and implementing service-learning programs.

Funded by the W.K. Kellogg Foundation, *Learning in Deed* is a national initiative designed to engage more young people in service to others as part of their academic life and to encourage school systems across the country to adopt service-learning programs. The Learning in Deed Web site (www.learningindeed.org) includes a useful set of FAQs on service-learning, as well as a variety of tools and resources geared toward specific groups within the service-learning community.

The Volunteer Recruitment Book, written by Susan Ellis and published in 1996 by Energize, Inc., takes the reader through all the steps of volunteer recruitment. One chapter includes sample brochures and posters from a variety of volunteer programs, which may provide readers with ideas for designing and writing effective recruitment materials. The book may be ordered from the Energize, Inc., Web site at www.energizeinc.com. In addition to the bookstore, the site provides free articles on a variety of topics related to volunteering.

A number of *volunteer registration Web sites* have searchable databases for people to look for volunteer opportunities that interest them, as well as additional resource materials for nonprofit organizations. Each has a step-by-step method for registering volunteer opportunities. The more databases that your volunteer position is listed on, the more exposure you will have and the higher the likelihood that you will recruit volunteers in this way. Here is a sample:

- *The Points of Light Foundation*, www.pointsoflight.org, has links to Volunteer Centers throughout the country, most of which maintain local databases of volunteer opportunities. This may be the first place for you to post a volunteer opportunity, because, unlike most other Web sites, it has a local focus.

- *The USA Freedom Corps Volunteer Network*, www.usafreedomcorps.gov, is a government-sponsored centralized volunteer Web site.

- *JASON* is a senior service registry associated with the federal Senior Corps program. Through this Web site, www.joinseniorservice.org, organizations can either register independent volunteer opportunities or can be part of Senior Corps' RSVP program, a national program that places older adults in volunteer assignments in localities throughout the country.

- *SERVEnet*, www.servenet.org, a project of Youth Service America, posts volunteer opportunities for people of all ages.

- *Volunteer Match*, www.volunteermatch.org, is a national volunteer registry that has made over 2 million volunteer referrals for people of all ages.

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Chapter 7

Training Volunteers

Being a mentor, you start the program with a little dread. But the program has given us the tools to effectively help the children in some way. You realize that, yes, the children are in peril, but there's hope and promise for them.

—Mentor

I'd want to have a volunteer position that was a learning experience for me, and so I would expect training to go along with that position.

—College student

A formalized training program is critical to producing knowledgeable, confident, and comfortable volunteers. Training can help new volunteers familiarize themselves with the program, gain basic skills, and get to know one another. It can also help experienced volunteers improve their skills, solve problems that have come up, and offer support. All of these things increase the likelihood that your program will be implemented as planned.

While all volunteers should receive some form of orientation to the tasks they will perform, the amount of training you provide will depend on the length and intensity of the volunteer assignment. This chapter presents information for providing in-depth training to volunteers participating in longer-term, more sensitive assignments, though much of the information can easily be adapted for volunteers who will perform less-intensive activities.

Since training volunteers for an intergenerational program can present some special challenges, this chapter also includes practical ideas for how to train young people and older adults most effectively.

Pre- versus In-Service Training

There are two basic types of trainings: pre-service and in-service.

All programs should begin with some pre-service training, which takes place before volunteers begin their service. This kind of training orients volunteers to the program's philosophy and operations and helps them develop the basic skills they need to get started. During these trainings, volunteers also begin to identify themselves as part of a team, working together to help the community.

For volunteers participating in ongoing assignments, it is often useful to supplement pre-service training with regularly scheduled in-service programs. This kind of training typically focuses on specific content areas and provides ongoing opportunities for volunteers to troubleshoot problems, exchange ideas, and support one another.

PLANNING YOUR VOLUNTEER TRAINING

Training is a crucial component of a successful intergenerational program, and methodical planning will help you ensure the effectiveness of your training session. However, when designing a training plan, it is also important to recognize that volunteers each have their own learning curves and that most learning will happen as the volunteers actually do their jobs.

Planning for both pre-service and in-service training involves four main steps: defining goals and objectives, outlining training content, developing instructional activities, and creating an evaluation tool. Since all programs require pre-service training, this section assumes that the training you are planning is to take place before your volunteers begin service. However, you will also find advice on how to adapt these steps to plan for in-service training.

PLANNING VOLUNTEER TRAINING AT-A-GLANCE

> **STEP 1:** Define your training goals and objectives
>
> **STEP 2:** Outline your training content
>
> **STEP 3:** Develop instructional activities
>
> **STEP 4:** Create an evaluation tool

Because trainings allow you to see how people interact in a group setting, pre-service training can also be valuable for further screening of potential volunteers.

Step 1: Define Your Training Goals and Objectives

What do you want volunteers to take away from the training? What must they know when they walk out the door? Creating written training goals and objectives will help to ensure that both staff and volunteers understand what the training will, and will not, accomplish, and will help you develop an effective training program that meets the needs of both groups.

Training goals spell out who will be affected and what will change as a result of the training. For example:

- To enhance volunteers' understanding of their roles in the program (knowledge)

- To strengthen volunteers' job-related skills (skills/behavior)

- To bolster volunteers' enthusiasm for the program (attitudes)

Training objectives describe how you plan to reach your goals. They are concrete statements that spell out what you want the training to achieve, including what will change, who will change, under what conditions, and to what extent. Objectives are usually stated in terms of changes in knowledge, behavior, and attitudes. For example:

- *Knowledge.* By the end of the training, each volunteer will be able to describe three techniques for teaching reading to young children.

- *Behavior.* By the end of the training, each volunteer will be able to initiate two activities designed to build trust with a young person.

- *Attitudes.* By the end of the training, each volunteer will appreciate the needs and concerns of the older adult population that he or she is slated to serve.

After you have developed your objectives, review and prioritize them. Decide which objectives you must accomplish right away, and which can be postponed for later trainings.

Step 2: Outline Your Training Content

Your objectives should shape your training agenda. The typical pre-service training session includes introductions, a program overview, a discussion of sensitive issues, a learning or skill-building component, the sharing (and allaying) of volunteers' hopes and concerns, and a wrap-up.

Introductions

Opening activities should stimulate interest in and enthusiasm about the training, reduce anxiety among participants, and build a sense of community.

- Let people know what to expect: Post and review the agenda and the training objectives.
- Have everyone in the room—volunteers and facilitators alike—introduce themselves and describe their reasons for participating in the program. (If the group is very large, you might complete these introductions in smaller sub-groups.)
- Conduct a fun, interactive icebreaker that forces people to interact.

Program Overview

A program overview should describe the following:

- The organizational background
- Program goals and philosophy
- Data and anecdotes about program successes
- Volunteer roles, including specific job responsibilities
- Program policies (e.g., confidentiality)
- The availability of staffing support

Think of creative ways to present this information. Involve volunteers and service recipients—past and present—who can share their experiences and answer questions. Consider showing a video or slide show. Avoid using the same materials that volunteers might have seen at a recruitment presentation.

At the end of this component, present volunteers with two copies of their job description: one to keep and one to sign and return to program staff.

Sensitive Issues

There are a few issues that need to be addressed before volunteers begin service. Any pre-service training should inform volunteers about the following:

- *Confidentiality policies.* Depending on the type of program, confidentiality rules may vary. For example, these rules are most strict for mentoring and respite programs and less restrictive for an oral history project. It is important for your volunteers to understand these rules up front. You should also reinforce expectations about confidentiality with all program participants over time.
- *Diversity.* Addressing diversity is particularly important when volunteers will be working with populations with ethnic backgrounds that are different from their own.

- *Religious activity.* Sometimes volunteers want to share their religious practices and beliefs with the people they work with. Discuss this issue with volunteers and provide guidelines for when this sharing is and is not appropriate.

These three important issues are discussed in more depth in Chapter 9: Nurturing Intergenerational Relationships.

A Learning Component

During this part of the program, volunteers engage in activities designed to accomplish the training objectives. Activities might include those that examine cross-age beliefs and attitudes; explore developmental, social, and health needs of the population that is receiving services; and develop general and specific skills. Most programs devote some time to general communication skills, particularly active-listening skills. In in-service training sessions, the learning component might include problem-solving activities to address both hypothetical and real-life issues.

In addition to general skills training, volunteers may need training in role-specific skills. For example, reading tutors might need to develop their teaching skills, while respite care volunteers should learn how to properly transport someone in a wheelchair.

Volunteers' Hopes and Concerns

There is no better way to reduce anxiety and eliminate misconceptions than to encourage people to express their fears and expectations about volunteering. Provide a non-threatening structure for facilitating this discussion—such as splitting into small groups, having people list their hopes and concerns, and then bringing the groups back together to identify common themes. Have staff, together with experienced volunteers, address each concern, either directly with the group or privately with the individual volunteer. If you cannot address the concern immediately, explain that it will be discussed at a future in-service.

Wrap-up and Next Steps

This segment should help bridge the gap between training and implementation, and promote a positive feeling of closure. It is your opportunity to "pull it all together" — to highlight essential learnings, summarize central concepts and themes, and describe next steps. Volunteers should know what to expect from the program and what is expected from them. One fun method for closing a training session is to write a group poem. Ask participants to complete the statement, "Today I learned . . " As each person shares what he or she learned, record these statements. Then, in poem form, recite the responses to the group.

Once you have begun to organize your training, create a rough training outline. Be clear about how much time you want to devote to each of the sections. In general, programs that require more intensive involvement between volunteers and service recipients require longer and more rigorous training. However, make sure that you don't overload volunteers with too much new information.

Many programs have found that 8–12 hours of training held over two days works well in preparing volunteers to get started.

Facilitators

Who should facilitate your training sessions? Think broadly. Intergenerational programming is, by definition, interdisciplinary. When designing workshops, don't hesitate to ask for help from outside agencies. Invite guest speakers to lead parts of the training. Faculty at colleges and universities and staff at community-based organizations can provide invaluable assistance as well as useful training materials.

If you are formally partnering with another agency, it is important to design and conduct the training with staff from that agency. Cooperating in this way spreads the work around, ensures that the information you provide about both populations is correct, and helps to develop positive relationships and shared knowledge between the two agencies.

In-Service Training Content

In-service events provide regular opportunities to reinforce the purpose of the program, clarify the roles of volunteers, enhance knowledge and skills, and encourage reflection about the volunteer experience. Ask your volunteers about their ideas for topics that they want to have addressed at in-service meetings. Encourage experienced volunteers to lead or co-facilitate selected in-service sessions.

In-service programs are usually held monthly or bimonthly, either at the service site or at an easily accessed central location. A session that lasts one and a half hours might include an icebreaker, a learning component, and a wrap-up, plus one or more of the following:

- A review of program business, such as upcoming events, recruitment activities, or holiday parties.

- Personal updates, such as birthdays, achievements, and health announcements.

- Activities designed to deepen knowledge and/or develop skills, such as a presentation by a guest speaker or additional training on a specific skill that has been identified by volunteers or staff.

- Personal development programs that address such topics as stress management, nutrition, movement and exercise, computer skills, and dealing with loss.

- Reflection activities that encourage volunteers to articulate what they are learning and how they are growing. Reflection is important for helping people understand what they are doing well (so they will repeat their success) and how they can improve. The CD-ROM Toolbox includes a list of reflection questions for volunteers to review at in-service sessions.

- Time to socialize before and after the training, when volunteers can talk informally to one another and to the staff.

Step 3: Develop Instructional Activities

You should identify, develop, and organize activities that will help you achieve your learning objectives. Try to include a variety of interactive teaching methods that actively involve participants in acquiring knowledge or practicing skills. This type of training, known as active training, serves many purposes:

- Helping participants remember what they've learned
- Increasing participants' confidence in their own abilities
- Showing respect for participants' insights and abilities, and setting a precedent for the respect you hope participants will show to others
- Providing opportunities to establish strong working relationships among participants and between participants and program staff
- Fostering excitement and enthusiasm

Characteristics of active training typically include the following (adapted from Silberman & Auerbach, 1998, pp. 13–15):

"Just enough" content. Don't overload learners with too much information. Include only what they need to know to do their jobs well.

An *appropriate balance of different types of teaching methods*, such as small-group and paired activities, role plays, video and slide presentations, topic-related exercises, problem-solving activities, and lots of discussion. Different methods appeal to different learning styles and serve different purposes. For example, small-group activities can be an effective way to encourage collegiality.

A *focus on problem-solving*, using real-life examples.

Recognition of volunteers' knowledge and experience. Active learning encourages participants to access their own life experiences in order to construct the knowledge they need to complete their tasks. This helps to alleviate many participants' fears that they don't "know enough."

A *periodic review of key skills and concepts*, both throughout a single training and over time, at regular intervals.

A *discussion of next steps* to prepare volunteers to integrate what they have learned into their new roles.

Step 4: Create an Evaluation Tool

The purpose of an evaluation is to determine the extent to which the training achieved its objectives and to identify what adjustments, if any, need to be made to your training plan or follow-up process. Your evaluation should address a number of questions, for example:

- Did the participants acquire the knowledge and skills that the training was supposed to provide?
- Were the trainers knowledgeable about training content?
- Were the activities interesting and effective?
- Was the training format appropriate?
- Is more training on this or related topics needed to support volunteers in their work?
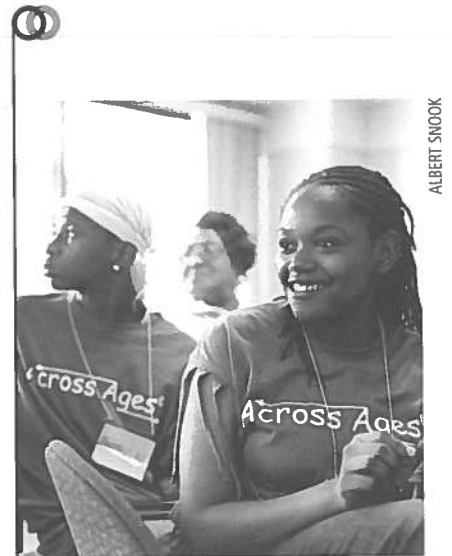
The simplest evaluation method is to draft a brief (one- or two-page) survey that volunteers can complete anonymously. Include questions that correspond to specific training objectives (see Table 7.1 for ideas on how to develop questions based on objectives). Also, ask general questions designed to measure program satisfaction (e.g., Was the training space comfortable for you? What did you like best and least about today's session?). Consider a mix of closed-ended and open-ended questions, leaving adequate space for answers.

TABLE 7.1
Generating Evaluation Questions

TRAINING OBJECTIVE	EVALUATION QUESTION (1 = NOT AT ALL, 2 = SOME, AND 3 = A LOT)
Volunteers will each be able to describe the specific responsibilities of their jobs.	To what degree do you understand the specifics of what is expected of you as a volunteer?
Volunteers will practice a range of different activities that can be used to build trust with a young person.	How prepared do you feel to begin engaging a young person in a mentoring relationship?
Volunteers will begin to feel connected to one another, as part of a productive team.	How satisfied are you with the opportunities provided to start getting to know other volunteers and staff?

STEPHEN SHAMES

Connecting Generations, Strengthening Communities

Sample Training Activities for Older Adults Serving Youth.

Older Adults Providing Support to Families of Children with Special Needs
Training includes:

- Participating in an exercise designed to sensitize the volunteers to issues related to having a disability

- Visiting an early intervention program, as well as integrated classrooms where children with a range of disabilities are students

- Brainstorming on how to engage in play activities with children at different developmental ages

Older Adults Providing Child Day Care Services
Training includes:

- Discussing stages of child development for infants, toddlers, preschoolers, and school-age children

- Exploring positive approaches to guiding behavior in small groups

- Identifying attributes of creative people and ways to promote creativity in children

- Practicing play activities with a variety of toys and games

Special Considerations When Training Older Adults

Training sessions for your intergenerational program will be more effective if you are aware of the specific needs of the populations with whom you are working. While it is a good idea to heed the following advice for training any population, these considerations are especially important for working with older volunteers.

- *Draw on the Experiences of Your Participants.* One reason that so many intergenerational programs are successful is that volunteers, particularly older adults, bring with them a wealth of knowledge, talents, resources, and experiences. When recruiting and screening volunteers, ask about relevant skills and knowledge, then incorporate this information into your training plan. Training that fails to draw on the experience of the volunteers runs the risk of boring people and making them feel patronized and disrespected.

- *Know and Respect the Culture of the Group You Are Working With.* For example, don't assume that you can call your volunteers by their first names; in many cultures, this is a sign of disrespect.

- *Provide Convenient, Safe, and Affordable Transportation.* For both mobility and safety reasons, minimize the distance from parking lots or bus stops to the training site. If possible, supply transportation or arrange to reimburse participants for related expenses.

- *Create a Comfortable Environment.* Training spaces should be wheelchair-accessible and have aisles that allow for canes or walkers. They should be well-lit and well-ventilated, and free from distracting background noise. Provide comfortable chairs and, if possible, a table for note-taking and refreshments.

At volunteer trainings, the staff talked to us like we had no sense or any knowledge. And half of them didn't know what they were talking about.
—Older adult volunteer

🔊 *Make Sure that Handouts and Overheads Are Easy to Read.* They should be double-spaced, with generous margins, and in large type with readable fonts.

🔊 *Be Sensitive to the Hearing and Sight Requirements of the Participants.* It is important to be aware of the special needs that older learners may have. Encourage individuals with audio or visual impairments to sit near the front of the room. Use a microphone for a larger group or when using a large room.

Sample Training Activities for Youth Serving Older Adults.

High School Youth Visiting the Homebound Elderly
Training includes:

- Participating in an activity designed to help the youth recognize and challenge common stereotypes about the elderly

- Participating in an activity called "Instant Aging," designed to raise awareness about what it feels like to be older person with sensory losses or other disabilities

- Reading and discussing poems written by elderly people, such as "Crabbit Old Woman," a poem written by an anonymous nursing home patient

- Role-playing hypothetical situations that might arise (e.g., responding to an adult who talks about problematic relationships with family members)

College Students Helping Older Immigrants Learn English
Training includes:

- Learning about the program, its goals, and their roles as tutors

- Participating in activities designed to help them understand multiculturalism, aging, and the processes through which older adults acquire skills in a new language

- Listening to a guest speaker describe the naturalization process

- Learning strategies for assessing the language ability of older adults

- Practicing planning lessons and developing tutoring materials

Special Considerations When Training Young People to Work with Older Adults

Your effectiveness in training young people may also hinge on your understanding of what is likely to matter most to them. Below are some important considerations for training younger volunteers.

🌀 *Make Sure that Trainings Are Age-Appropriate and Role-Specific.* Someone who knows what information is appropriate to share and what training methods are most effective for the age group of your young volunteers should be involved in designing and facilitating the training. For example, first- and second-graders who are doing a project in a nursing home would typically not be given a tour of the residential section of the facility because children this age should not be walking around the facility unsupervised, and they might encounter sights, sounds, and smells that could be both upsetting and irrelevant to their visiting role. An alternative strategy might involve the children viewing a short video that you create of the nursing home and its residents. On the other hand, teen volunteers should receive a full tour. They are more likely to be given autonomy to move about the facility on their own, and they are mature enough to understand issues related to residents' health and social conditions.

🌀 *Emphasize the Heterogeneity of the Older Adult Population.* Youth who will work with disabled elders need to understand that most older adults are able to take care of themselves. Youth who will work with healthy elders should be made aware, after the project has started, that old age can also be a time when some people are challenged to meet their daily needs. Students should know that older adults can have productive and satisfying lives, whether or not they are disabled, and that all have something to offer.

🌀 *Help Youth Appreciate Both the Positive and the Negative Aspects of the Aging Process.* A number of activities are designed to increase understanding about aging and ageism, for example:

- Having students describe older people they know or who are famous
- Having an older adult visit the classroom and talk about his or her life
- Having students explore the concepts of stereotyping and diversity, especially if there are cultural and ethnic differences between the youth and the residents

> *The training helped me learn how to deal objectively with Alzheimer's patients and how to react in different situations.*
> —College student

ALEX HARRIS

Sample Training Activities for Older Adults and Youth Serving Together.

Below are some examples of training activities for intergenerational programs in which seniors and young people work together.

People Ages 14 to 93 Acting in a Volunteer Intergenerational Improvisational Theatre Troupe
Training includes:

- Taking an eight-session introductory workshop on acting and improvisation, followed by competitive auditions to become troupe members

- Participating in 12-week sessions throughout the year to learn theatre techniques and to rehearse

- Bringing in specialists in movement, acting, and performance topic areas (e.g., environmental health)

- Creating scenes utilizing intergenerational relationships and requesting actors to do role playing

Children and Older Adults Working to Build a Community Garden on a Vacant Lot
Training includes:

- Participating in cross-age icebreaker activities over three meetings

- Learning how to work with gardening tools safely and effectively

A Class of Tenth-Graders and a Group from a Senior Center Making a Tile Mural for the School Entrance
Training includes:

- Participating in exercises in which they explore their views of the other age group in separate meetings before they meet as an intergenerational group

- Interviewing a member of the other age group at the first two group meetings

- Learning in intergenerational teams how to work with clay to make a tile

ALBERT SNOOK

TIPS FOR PREPARING FOR A TRAINING SESSION

These practical tips will help ensure that your carefully planned training session will be inviting and well-attended:

Send volunteers written confirmation of participation. Include the location, the date, the time and length of the training, and directions to the site.

Call volunteers several days ahead to remind them of the training. Identify transportation needs, help facilitate carpooling, and answer additional questions. If you think it would be helpful, call again the day before the training.

Arrive early to set up. Have refreshments available so that early-birds can help themselves and socialize while you attend to last-minute details.

READY TO TRAIN

With your plan in place, you might think that your training session is sure to come off without a hitch. But in order for a training session to be effective, facilitators need to be sensitive to the needs of volunteers, read their signals, and be able to think on their feet.

During the training session, keep the following in mind:

Be sensitive to participants' literacy levels. Avoid jargon and use of acronyms. Make sure that written materials are simple, direct, and concrete.

Encourage volunteers to participate and ask questions. Build in one-to-one time and small-group discussions for those who may feel uncomfortable talking in front of a large group.

Model good listening skills. Listen carefully and respectfully. Maintain eye contact with each person as she or he speaks. Acknowledge what people say, even if you don't agree. Monitor your nonverbal signals, as well as your verbal comments.

Provide direction. Facilitators may believe that it is disrespectful to interrupt older adults, or be overcautious about asserting authority with young people. Nonetheless, it is important to keep the group on task and moving forward.

Keep your finger on the group's pulse and be prepared to change your plans. Older adults and youngsters are less likely than many other groups to conform to polite training etiquette—they'll let you know if they're bored. If you notice more than a few participants fidgeting, murmuring, or falling asleep, stop what you're doing and give the group a break. If you planned an activity to last 20 minutes, cut it off after 10 if people are not engaged. On the other hand, if the group is high-energy and working with gusto, let the activity or discussion continue for awhile.

Provide opportunities for feedback. Check in with a few participants at each break to ask how it's going. Have participants complete an evaluation at the end of the session.

Make sure that participants experience a sense of accomplishment and have fun. If they don't enjoy the training, they'll never come back for more!

In Closing

Training is an essential part of any volunteer experience. Training serves to excite volunteers, keep them motivated, provide them with the skills and tools needed to feel confident and be effective, and create an important sense of ownership for the program among the volunteers. While this chapter has provided general information about training volunteers for intergenerational programs, you will be designing a specific training program for your program. The CD-ROM Toolbox has sample curricula and training tools that you may use or adapt.

The formal training you will do with your volunteers will provide a foundation for their services—but learning is an ongoing process. Chapter 8: Supervising Volunteers looks at how your work with volunteers can deepen their learning.

IN THE **CD-ROM Toolbox**

- **Sample Pre-Service Training Agendas**
- **Exercises to Prepare Youth to Work with Older Adults**
- **Exercises to Prepare Older Adults to Work with Children and Youth**
- **Role Plays**
- **Links to Chapter 7 Resources**

RESOURCES

Linking Education and America Reads through National Service (LEARNS), formed through a partnership of the Northwest Regional Educational Laboratory and Bank Street College of Education, provides training and technical assistance to the Corporation for National Service projects that focus on literacy and education. The LEARNS Web site contains many concrete training exercises and games for literacy tutors and mentors, as well as back issues of LEARNS' newsletter, The Tutor. Visit the Web site at www.nwrel.org/learns/.

The National Academy for Teaching and Learning about Aging (NATLA), based at the University of North Texas, offers free lesson plans on its Web site on a variety of topics, including "Elders as Resources," social studies, and language arts. Although the curriculum is titled For Elementary Grades, many of the lesson plans, such as "Writing Fiction: Using Older Characters," "Japan and the U.S.: A Comparison of Laws for Older Citizens," and "Town Budget Meeting: Meeting Needs of Young and Old," are also suitable for middle and high school students. NATLA has also produced more in-depth curricular materials and provides a list of children's books about aging, all of which are available on its Web site: www.unt.edu/natla/.

The Resource Center provides training and technical assistance to programs funded by the Corporation for National and Community Service and to any organization using volunteers to strengthen local communities. The Center's Web site (www.etr.org/nsrc) contains a variety of materials designed to help community service programs develop and implement volunteer programs. Documents can be downloaded at no cost or purchased for a nominal fee.

Positively Aging: Choices and Changes, an aging awareness–health promotion curriculum designed for middle and high school students, was developed by the Aging Research and Education Center at the University of Texas Health Science Center. The curriculum emphasizes exploring students' perceptions about older people and health topics. Curricular materials can be downloaded, at no cost, from the Positively Aging Web site at teach-healthk-12.uthscsa.edu.

Connecting Generations: Integrating Aging Education and Intergenerational Programs with Elementary and Middle Grades Curricula by Barbara Freidman, 1999, provides in-depth curricular materials in aging for classroom-based intergenerational programs. Published by Allyn and Bacon.

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COURTESY OF GENERATIONS UNITED

Chapter 8

Supervising Volunteers

Supervision is . . . the glue that binds the volunteer program together, linking training, on-going motivation, evaluation, recognition, and employee-volunteer relationships.

——Susan Ellis

As the backbone of most intergenerational programs, volunteers deserve both support and attention. Strong supervision lets volunteers know that the organization values them and takes their roles seriously. Volunteers who are well-supervised will have a greater sense of accountability to the organization. They will be able to offer more to service recipients, and they themselves will get more out of the volunteer experience.

The ideas for in-service training discussed in the previous chapter offer one avenue for overseeing and guiding your volunteers throughout their participation in your program. This chapter offers a broader view of supervision, exploring its benefits and offering strategies to motivate, empower, and monitor your volunteers through supervision, as well as ensure the quality of their work.

SUPERVISION TO MOTIVATE VOLUNTEERS

Volunteers are more likely to do their jobs well—and feel good about what they are doing—if they feel safe, supported, and respected. Volunteers who feel nurtured in this way will be more forthcoming about their questions, concerns, and suggestions, and more open to receiving both positive and negative feedback. They are also more inclined to take risks and step into leadership positions.

Some strategies for motivating your volunteers are discussed below.

- *Provide Frequent Contact.* Contact is particularly important at the beginning of an assignment when volunteers may feel unsure about their responsibilities. Let volunteers know how to contact you and when you're available to meet with them. Group and individual e-mails are also convenient ways to stay connected and keep volunteers informed, especially when working with high school and college students. Return phone calls promptly.

- *Create Opportunities for Learning.* An important aspect of supervision is teaching. Provide regular opportunities for volunteers to develop their skills and increase their competencies. This can be done through group meetings, such as ongoing in-service training, or one-to-one supervision. The latter is most common when volunteers have unique roles or leadership positions.

- *Acknowledge Their Experience and Expertise.* With volunteers of all ages, but especially with older adult volunteers, it is important to acknowledge and draw out their experience. Volunteers will be turned off if they feel like what they bring to the program is not valued and respected. Seek their opinions and implement their good suggestions. Whenever possible, involve them in setting goals, developing strategies, and planning in-service training sessions.

- *Provide Support and Room to Grow.* Remind everyone that, just as with any new job, there is a learning curve—it may take time to get the hang of the position. With some volunteers, particularly young people who are shy and lack confidence, it may be helpful to model tasks and repeatedly provide reinforcement as they learn their roles. Then show your trust and respect in their abilities by giving them more autonomy.

- *Foster Team Work Among Volunteers.* Creating opportunities for your volunteers to work together on projects and to socialize will result in people who feel bonded to one another and to your organization.

💫 *Provide Consistent Feedback.* Feedback should recognize individual contributions, provide specific suggestions, be more positive than negative, and address performance problems in a professional way.

💫 *Say "Thanks!".* One of the easiest ways to show volunteers that their contributions are appreciated and valued is by saying "thank you" on a regular basis. Some of the more standard ways to recognize volunteers' contributions include giving recognition awards and gifts (such as T-shirts, coupon books, and gift certificates), profiling volunteers in newsletters and on Web sites, and hosting recognition events. Here are some other ideas:

- Send a personal note, written on your organization's stationary or on a card chosen especially for the individual volunteer. Describe how the volunteer's work has affected both you personally and the organization. Emphasize a recently accomplished task or project the volunteer contributed to, and describe how it strengthened your program.

- Send letters to family members of volunteers. Involving family works with all generations; you can write to the parents of teen volunteers or the children of older adults. You might also invite family members to recognition events.

- Offer a gift created by the group receiving services. For example, if your volunteers work with students, have the students create a piece of art—such as a thank-you card or decorated button—that they can give to their volunteers. This type of gift is meaningful, creative, customer-generated, and inexpensive.

SUPERVISION TO EMPOWER VOLUNTEERS

A second important goal of supervision is to empower: to help volunteers develop the skills and confidence to take risks, think about their responsibilities within the context of the organization as a whole, and take on leadership roles.

Leadership roles include serving on a planning committee or advisory board, coordinating and supervising other volunteers, assisting with volunteer recruitment, writing newsletters, developing program materials, fundraising, and advocating for policies.

Fostering leadership among volunteers benefits the organization, the volunteer, and the community.

Volunteers at the Helm

You can create leadership positions that are both substantive and rewarding. For example, one Experience Corps site hired a team of retired teachers to serve as curriculum specialists who developed training materials and conducted weekly in-service trainings for the schools that use them. Project SHINE enlists college students to serve as team leaders at community sites where their classmates tutor older adult immigrants in English. Experienced Project SHINE tutors also make class presentations to recruit students and faculty.

Small gestures go a long way. Remembering a volunteer's name and significant personal information shows that you value that person as an individual.

Benefits to the Organization

An empowered volunteer force offers many benefits to your organization:

- *Increased capacity to manage and implement programs.* As volunteers assume more responsibility, the organization is able to provide quality programming and services to more people.

- *Better continuity of services.* Many small nonprofit agencies rely on one or two staff to run their programs. When these responsibilities are shared with volunteers, there is less risk that services will be interrupted when budgets are cut or key staff leave.

- *Improved service delivery.* Placing volunteers in positions of responsibility sends the message that the organization trusts volunteers and acknowledges and rewards their achievements. This translates into increased feelings of ownership and responsibility among all volunteers, which, in turn, translates into higher quality work and improved services.

Benefits to the Volunteer

Accepting a leadership role can also be extremely empowering to the volunteer. Volunteers in leadership positions have opportunities to do the following:

- *Take risks.* Volunteer leaders often step out into the unknown. It can be both scary and exhilarating to have more visible and responsible positions.

- *See things from the "other" side.* Volunteer leaders often gain a new perspective on programmatic issues and challenges. The volunteer leader needs to buy into, then inspire in others, a shared vision for the program.

- *Increase their skills.* Volunteer leaders frequently learn new skills and/or ways to apply existing skills to new situations.

- *Be role models.* Volunteers have credibility with one another. Enthusiasm and dedication exhibited by volunteer leaders will be even more inspiring to other volunteers than the same characteristics displayed by staff.

Volunteers Supervising Volunteers

Volunteers in leadership roles are often expected to supervise other volunteers, which can be both rewarding and challenging for them. Being in a position of authority can be uncomfortable for some volunteers. For example, they may choose to avoid confronting another volunteer about a problem if the confrontation is likely to cause bad feelings. Here are some tips for helping volunteers succeed in their supervisory roles:

- Provide training, emphasizing issues that are specific to supervising peers.
- Be specific about the extent of the volunteer supervisors' authority.
- Meet with the volunteer supervisors individually to discuss their roles.
- Acknowledge the potential for discomfort, but emphasize the importance of the work the volunteer does.
- Make sure that all volunteers know who their supervisors are. Remind them that volunteer supervisors have as much authority as their paid counterparts.

Benefits to the Community

Fostering volunteer leadership can benefit the community. According to Michael McCabe, author of Pathways to Change: Linking Service to Sustainable Change (2001), organizations should create pathways that "allow people to be engaged in ways that meet immediate needs, as well as address the causes and policies underlying the issues for which they volunteer" (p. 3). Strategies for creating these pathways include the following:

- *Providing time for reflection.* Provide volunteers with regular opportunities to think about their roles in the context of the bigger picture. During both pre- and in-service trainings, ask reflective questions, such as, "What now? What can we do to affect the underlying causes of the issue that led us to volunteer?"

- *Creating opportunities for civic action.* Help volunteers find ways to become involved in advocacy, policy-making, and increasing public awareness. For example, volunteers who feel comfortable using the Internet can use their skills to collect information about policy initiatives that affect your program and/or the people you serve.

- *Networking with political representatives and policy groups.* For example, invite a lawmaker to an in-service meeting to speak about his or her experiences addressing the problems your program confronts.

Keep in mind that many publicly funded agencies are prohibited from participating in certain advocacy activities. See the Charity Lobbying in the Public Interest (www.clpi.org) or Independent Sector (www.independentsector.org) Web sites for more information about promoting civic action.

Does Your Organization Empower Volunteers?

Most programs would benefit greatly by having volunteers who act as leaders. However, programs with strong volunteer leadership are the exception rather than the rule. Volunteers are far more likely to become leaders in organizations that have the infrastructure in place to make it happen. To assess the degree to which your organization supports volunteer leadership and whether you are ready to actively develop and fill volunteer leadership roles, consider the questions below. If it turns out that you are not yet ready, then ask yourself if this is what the organization really wants and needs.

What Are Your Current Leadership Practices?

You can begin to assess how much your program empowers volunteers by asking staff and volunteers the following:

- Do we encourage people to take risks and change the status quo?

- Do we work as a team and encourage collaboration?

- Do we provide encouragement on an ongoing basis?

- Do we encourage people to see the big picture? Have we created a clear vision?

To What Extent Do Volunteer Roles and Responsibilities Promote Leadership?

For example, do you expect your reading tutors to simply show up for their hour of tutoring, or are they supported in developing their own instructional plans, interacting with teachers, and providing support to one another?

Do You Have the Infrastructure in Place to Successfully Integrate Volunteers into Leadership Roles?

For example, is there staff available to train and supervise volunteer leaders? Could volunteer stipends be added to the program's budget? If the infrastructure isn't currently in place, do you think the organization's current leaders would be amenable to making the necessary changes?

Are Older Adults and Youth Involved in Program Planning?

Some of the most effective intergenerational programs include older and younger generations in an advisory board or planning committee. Are the suggestions of these participants listened to and incorporated into the program?

TIPS FOR EMPOWERING VOLUNTEERS

Strategies for empowering volunteers include the following:

Identify "informal" volunteer leaders. Meet with volunteers individually or in small groups to discuss ways to promote leadership across the organization.

Increase volunteer knowledge and awareness of program goals. Make sure that volunteers understand how their efforts help the program achieve its goals.

Ask volunteers to suggest ways to improve the program. This not only widens your perspective, but also increases your volunteers' investment in the program's success.

Identify ways to include leadership responsibilities in current volunteer roles. For example, consider having volunteers facilitate portions of your in-service training or provide support to new recruits.

Provide incentives, such as stipends and reimbursement of expenses. Stipends are especially important for volunteers who are expected to fulfill administrative duties, such as regularly submitting paperwork. Other incentives include gift cards, lunch, and tickets to cultural and sporting events.

Publicize leadership positions to both current and potential volunteers. This may motivate current volunteers to try new roles and entice potential volunteers who are looking for more challenging opportunities. Keep in mind that hand-picking individuals for all leadership positions could alienate your base group of volunteers. If you invite particular volunteers to apply for a position, let them know that they may be competing with other volunteers who are interested.

Provide resources and support. Empowering volunteers requires an investment of staff time and additional resources (e.g., a workstation, a computer). These investments enable volunteers to forge ahead in their new roles.

SUPERVISION TO MONITOR VOLUNTEER PERFORMANCE

Monitoring helps to ensure that the quality and quantity of a volunteer's work meets the program's standards. It is accomplished by collecting information—either during regular phone calls, via periodic meetings, or by having volunteers complete certain types of paperwork. Volunteers should understand that they are accountable for the work they do, but they should never feel singled out or scrutinized. Monitoring is accomplished most effectively within the context of a good supervisor-volunteer relationship.

It's common for volunteers to feel sensitive about being monitored. To make the process less threatening, remember to underscore the fact that all volunteers are monitored equally and that the purpose of monitoring is to improve program quality—not to "check up" on wayward volunteers. Also, let volunteers know if regular contact with the program is a funding requirement.

Monitoring Methods

Your monitoring methods will vary, depending on the volunteer assignment. Methods of monitoring include weekly phone calls, having volunteers submit time logs or timesheets, observation, formal performance evaluations, and keeping the lines of communication open.

Weekly Phone Calls

These are appropriate for programs that involve higher levels of volunteer-client involvement or that are emotionally challenging, such as mentoring or respite care programs. The purpose of these calls is both to monitor what is happening and to provide support. Develop a standard set of questions that address how the relationship is progressing, relevant family issues, specific goals that the volunteer and clients may be working toward, the best thing that happened that week, issues that may have arisen, and ways that the program can provide additional support. Phone calls may become less frequent over time.

Time Logs or Timesheets

Volunteers, particularly those who receive stipends or work for programs that have clear time requirements, may need to complete a time log or have a timesheet kept for them by their supervisors. Some programs ask volunteers to keep a checklist of activities they have completed.

Observation

Often, the best way to assess how volunteers are doing is through firsthand observation. When this is not possible—for example, when volunteers work off-site—then identify someone that can serve as a "surrogate" observer. For example, if your program takes place in a school setting, all volunteers should be told in advance that school staff will provide the program with progress reports on how the volunteers and students are doing. If your program involves home visits, contact family members who receive services to find out how things are going. Make sure to ask specific questions that will elicit positive feedback, as well as identify problem areas. Share with volunteers any positive feedback you receive so that they can feel at ease about the feedback process.

Our elementary education supervisor showed up to support one of our school-based tutors, to see if there were questions or concerns or if she needed anything. The tutor's first reaction was defensive. She asked, "Why do you come so often?" When the supervisor explained that she goes around to all the schools regularly, the tutor smiled and said, "I thought you were here to check up on me!"
—Program Director, SMART, Yonkers, New York

There are so many issues when making telephone contact with mentors and families. Sometimes the mentors don't want to look like they don't know what they're doing or that they're making a mistake. Parents don't want to get the mentor in trouble. So, how you ask questions and the reassurance that you give are key.
—Program coordinator

Formal Performance Evaluations

Consider meeting individually with volunteers two to three months after they've come on board to discuss how things are going and identify areas that may pose problems. It is also a good idea to meet annually with volunteers involved in long-term assignments. These formalized performance reviews provide a great opportunity to explore how the volunteer's experience can be further enhanced. They can also be useful if you later need to provide a job reference for a volunteer. (This is most common for programs in which students provide services.)

Keep the Lines of Communication Open

Many volunteer programs have a hard time convincing volunteers to contact staff when they are having problems. Use in-service meetings to reinforce the message that staff members are available to help think through challenges, problem-solve, and provide support. Have volunteers who have asked staff for help share their stories and encourage their peers to seek help when needed.

Young Supervisors for Older Volunteers

It's not unusual for there to be some tension when a younger staff person is supervising an older adult volunteer. Sometimes younger people feel uncomfortable giving guidance and negative feedback to older volunteers. Other times, older volunteers feel like the young staff don't have adequate experience and don't acknowledge the volunteers' experience. It is up to staff to consciously deal with this issue, and there are a number of ways they might do so:

- Demonstrating respect for older adults' experience.

- Clarifying their own supervisory responsibilities and the program's accountability requirements.

- Telling the volunteers about their own backgrounds. Rather than being mysterious or overly modest, they should share information about their educational and work history, as well as pertinent personal information. For example, a staff person for a kinship support program who was raised by her grandmother should share that information with her volunteers.

- Talking openly about the challenges of this kind of supervisory relationship. Tell the volunteers that as participants in an intergenerational program, they have an opportunity to learn about and demonstrate mutually respectful and reciprocal relationships. Through discussion, staff and volunteers can reframe the discomfort of an intergenerational supervisory relationship into something that is productive and even playful.

SUPERVISION TO ADDRESS VOLUNTEER PROBLEMS

A strong supervisor must also be ready to address volunteers' performance problems if and when they arise. Performance problems tend to fall into one of four categories: quality of work, quantity of work, timeliness, and rate of improvement. How you handle a problem depends on its level of seriousness. Egregious problems, such as a tutor who yells at her students or a respite care worker who regularly misses his home visits, should be dealt with immediately and may require a formal sit-down meeting and documentation. Less serious issues, such as a volunteer whose written reports lack detail, can be handled more informally, through regular feedback mechanisms.

Strategies for Addressing Performance Problems

There are numerous strategies for handling performance problems, several of which are discussed below.

- *Find Out If the Problem Is Unique to One Volunteer or Shared by Others.* If this is a common problem, consider how the organization may be contributing. Are job descriptions clear? Are they reasonable? Is training adequate? Address the problem at the next in-service meeting as an issue that is affecting many volunteers.

- *Respond Promptly But Rationally.* If the problem is serious, give yourself time to cool off before addressing the volunteer. Meet with the volunteer privately. Describe your concern in as much detail as possible, giving concrete examples.

- *Listen.* Let the volunteer describe his or her perspective. The more you can find out about what really happened and where the volunteer is coming from, the easier it will be to come up with a solution.

- *Don't Make Assumptions.* Perhaps you have discovered that children tutored by one volunteer seem to be making less progress in school than children tutored by your other volunteers. Before assuming that this outcome is related to the volunteer's performance, do more research. There may be other explanations for what's going on.

- *Discuss the Consequences of the Problem.* For example, volunteers may be unaware that by not completing paperwork, they are jeopardizing a program's funding. If needed, refer to the volunteer job description, training materials, and policy manual to clarify expectations.

- *Work Together to Determine the Next Steps.* See if there are ways to adjust expectations so that everyone's needs can be met (e.g., by changing aspects of the job or shifting hours). For more serious or recurrent problems, develop a written plan that the volunteer reviews and that both the volunteer and the supervisor sign. Set a date to check in and re-assess how things are going.

I used to have the kids over to my house; I didn't know that eventually it would become a problem. When they were smaller, it was okay. But when the kids got bigger, I couldn't handle them because they changed. They were loud and fighting and disruptive in my house, and angry. I was involved with the family for seven years; it was wonderful. I got used to the kids, you know. They were like my own, sort of. And it was very hard to just say, "I can't have you over to the house any more." I'm still hurting.
—Older volunteer

Supervising Students

A common way to recruit volunteer students is through their classes, with students sometimes coming in a group to a community-based site to fulfill community service or service-learning requirements. This may happen with high school students who participate in projects at nursing homes or with college students engaged in a range of intergenerational projects. In many of these instances, the students are monitored by the site staff, who may feel like they have limited authority to address performance issues. Before the students walk in the door, it is important that the site staff and the faculty who give students course credit have an agreement about how monitoring is managed and how problems with student volunteers are handled.

As one director of a service-learning program explained, "We need the teachers to buy in to the program because they are the ones who hold the students accountable. If there's minimal accountability on the part of the teacher, then there are no consequences for students who don't fulfill their obligations. For example, if they don't show up, their grades aren't affected."

Factors that Contribute to Performance Problems

Two factors that may produce performance problems among the best of volunteers are burnout and health changes associated with aging.

Burnout

Burnout can happen to any volunteer, but it is more prevalent among volunteers whose roles require high levels of emotional involvement and long hours, such as older or younger volunteers who work intensely with people who have significant health or emotional needs. Volunteers who are most vulnerable to burnout often have difficulty saying "no," setting boundaries, and/or asking for help. With this in mind, you can take measures to help prevent and detect burnout, and manage volunteers who are affected.

Identify those at risk. One way to do this is through careful screening. Ask new volunteers how comfortable they are saying "no" or asking for help. Then use their responses to guide your placements. (For example, you wouldn't want to match a volunteer who describes herself as "too giving" with the most stressed child or family in your caseload.) If you conclude that the assignment may be too stressful for a particular volunteer, explore other service options.

Emphasize the importance of setting boundaries. This is particularly important for volunteers who will be involved in one-to-one relationships with individuals or families who have significant problems. Provide opportunities for volunteers to practice saying "no" (e.g., through structured role plays or paired discussions), review written policies that delineate volunteers' expectations (including what volunteers are, and are not, expected to do), and encourage volunteers to contact staff when problems arise. Have one or two experienced volunteers share strategies for setting boundaries and ways that they worked with staff to address individual challenges. Finally, remind volunteers to trust their instincts. Make sure they know it's okay to come forward and discuss with their supervisors any request or interaction that doesn't feel right.

Stay in touch. Check in regularly with volunteers to see how they're doing and find out what's going on. The more comfortable they feel with their supervisor and program staff, the more likely they will be to disclose when they are taking on too much.

Signs of Burnout

To detect burnout, look for these red flags:

- Physical changes—particularly those that may be stress-related, such as fatigue, increased pain, and rashes

- Emotional changes, such as decreased enthusiasm, sad affect, lack of humor, and being short-tempered

- Poor attendance at meetings

- Increased lateness or absence for volunteer appointments

- Not returning phone calls

- Not submitting paperwork

Strategies for managing burnout include providing support and assisting in problem-solving, which may involve scheduling frequent supervisory check-ins, brainstorming with the volunteer some ways to make the assignment manageable and satisfying, and developing a document that delineates expectations for that individual. Sometimes staff can intervene with service recipients to clarify client and volunteer expectations. In special circumstances, it may be necessary to refer the volunteer for specific services.

However, the most empathetic support still may not be enough, and you might need to recommend a leave of absence, or even request that the volunteer terminate his or her services (which is discussed later in this chapter).

Health Changes Associated with Aging

Programs that employ older volunteers often find that some volunteers who have worked with the program over time are confronting challenging health changes. Sometimes, these health changes are abrupt and significant, necessitating either temporary or permanent departure from the program. More commonly, volunteers' chronic conditions take their toll more gradually, by affecting mobility, dexterity, sensory abilities, and energy levels. Some volunteers, for example, may reach a point where they no longer feel safe driving. Others may experience cognitive changes. Cumulative losses, such as the deaths of loved ones or declining health, may produce acute sadness and even depression.

Despite these changes, many volunteers still have abundant talents to offer a program. Your program will benefit from being flexible and creative, and providing volunteers with the support and information they need to continue doing their jobs. On the following page, a variety of strategies for accommodating the needs of aging volunteers are discussed.

We asked one volunteer to take a leave of absence. She was a terrific volunteer, but hearing about the sexual molestation that the child she worked with had experienced really got to her. She developed a stress-related skin condition. She had lots of telephone support from staff and from the other mentors. We connected her to a counselor at the local rape crisis agency, so that she could get the specialized support she needed to cope with what she had been exposed to. She came back after the leave of absence, but eventually dropped out. We recommended her to another program where she still worked with children but under less difficult circumstances. That worked out better.
—Program director

Create Roles that Are Less Taxing. When volunteers appear to have difficulty summoning the energy they once had, explore how their roles might be tweaked to make them "doable" by, for example, decreasing their hours or modifying their responsibilities.

Promote Experienced Volunteers to "Emeritus" Status. Consider having them mentor new volunteers and/or consult with staff supervisors. Emeritus volunteers could also take on such leadership positions as in-service facilitator, newsletter columnist, volunteer recruiter, or advisory board member.

Provide Adaptive Equipment. Some volunteers may be able to continue in their jobs with adaptive equipment. Examples include magnifiers for people with visual impairments, telephone ear pieces for volunteers with hearing problems, ergonomic keyboards for volunteers who have problems with their hands or wrists, and transportation assistance for volunteers with diminished energy.

Integrate Health Topics into In-service Meetings. Experienced volunteers may not need service training as much as they need support for the changes they are going through in their lives. Some programs report that as volunteers get to know one another better, in-service meetings become more like support group meetings than formal trainings. Build connections among team members by setting aside time for personal discussion. Bring in speakers on health and wellness topics, provide information on benefits, and share relevant resource materials.

Reduce Task Complexity. Volunteers who experience cognitive changes may be unable to complete tasks they were once able to do, but may nonetheless have much to offer to the program. Consider whether there are less complex tasks that these volunteers can do instead. Be sure to discuss the situation with them, which is important for both the individual and the program.

Deal Directly with Cognitive Change. If volunteers are becoming forgetful or confused, it is critical that they receive medical attention as soon as possible—some forms of dementia can be slowed down or reversed if detected early. It is also important that you feel comfortable with and confident in your volunteers' abilities to accomplish their tasks and do so effectively. Any discussion of cognitive change must, of course, be done with sensitivity and is most easily accomplished within the context of a warm supervisory relationship.

TIPS FOR TALKING TO VOLUNTEERS ABOUT COGNITIVE CHANGES

Here are some suggestions for talking to volunteers about noticeable changes in their cognitive abilities:

Be direct but discrete.

Begin by discussing noticeable changes in how the person's work is being affected. Provide specific examples.

Ask the volunteer if he or she has noticed these changes. Explore the volunteer's perspective.

See if there are other jobs better suited to the volunteer's current abilities or ways that the job can be altered so that the volunteer can continue in the role.

If the volunteer is working one-to-one with a mentee or family, discuss how they will be informed of any changes in roles.

Ask the volunteer if he or she has seen a doctor since the problems have begun or worsened.

Have resources available to give the volunteer about how to be properly assessed for cognitive changes. As the volunteer may have difficulty following through on advice to contact a doctor, solicit permission to contact a family member.

If the volunteer does not acknowledge the job problems, will not get help, or refuses to change his or her job activities, the volunteer may have to be terminated.

Terminating Volunteers

Though unpleasant for all involved, terminating a volunteer is sometimes necessary. A volunteer whose work is inadequate, or whose behavior regularly compromises an organization's capacity to provide quality service, should be discharged. Doing so sends a message to all volunteers that their work is valued and that they are expected to meet high standards.

Are There Alternatives?

Terminating a volunteer should always be your last resort. Prior to termination, consider these options:

- Problem-solving through supervision
- Re-assignment
- Additional training
- Encouragement to take a temporary leave, particularly if problems relate to burnout
- Referral to another volunteer agency for a different type of job or setting

Terminating a volunteer is qualitatively different from terminating an employee. When someone offers his or her time and heart without being paid, there is a special kind of vulnerability. "I'm giving myself to you for free," she may be thinking, "and you're saying 'no thanks.'"
—Program director

All organizations that use volunteers should have written termination policies that specify conditions that could lead to termination, persons responsible for determining if and when termination is necessary, and processes that will be completed prior to making this decision. Written policies should also include provisions for probation and suspension. These policies should be distributed to all volunteers when they enter a program, and discussed at pre-service training. Explain that these guidelines will be applied to all volunteers equally and fairly. To avoid the appearance—or existence—of bias, establish a system in which more than one manager reviews the situation.

TIPS FOR TERMINATING A VOLUNTEER

No one wants to have to tell a volunteer that he or she is terminated. But if you determine that this is the action called for, the following tips will make it easier for both the supervisor and the volunteer:

- Conduct the termination meeting in private.

- Be direct, quick, and unequivocal. Practice what you want to say in advance.

- Announce, do not argue. By now, negotiations have already occurred without a successful outcome.

- Follow up. Send a letter to the volunteer documenting the decision and providing needed departure information. Inform other volunteers, staff, and clients that the volunteer has left, without divulging why.

In Closing

Volunteers are one of your organization's most valuable resources. When volunteers do not receive proper supervision, they become a wasted resource. They also become discouraged, either with the work they're doing or with volunteering altogether. On the other hand, with strong supervision, volunteers' contributions can be maximized, often beyond the limitations envisioned by staff and program structure. When your volunteers flourish, so will your program.

IN THE **CD-ROM Toolbox**

- **Volunteer Performance Review**
- **Volunteer Termination Letter**
- **Links to Chapter 8 Resources**

RESOURCES

Energize, Inc. is an international training, consulting, and publishing firm specializing in volunteerism. Its Web site (www.energizeinc.com) suggests a variety of ideas for training and supervising volunteers. In particular, the bulletin board offers many stories of varied and creative volunteer recognition activities, which can give you ideas for showing volunteers that their contributions are appreciated and valued.

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Connecting Generations, Strengthening Communities

Chapter 9
Nurturing Intergenerational Relationships

At first I thought my friends would laugh at me, being out with this old person. But my mentor listens to what I have to say—asks questions and really listens . . . I feel like I have a real friend.

—12-year-old participant in a mentoring program

I realized that I was talking with persons who were but a fraction of my age. I was surprised by the number of times our feelings coincided.

——Retiree in a reading discussion program

Relationships are the core of intergenerational programs. Participants who feel personally connected to their cross-age partners are more likely to learn from one another. Their understanding and appreciation of intergenerational differences—and similarities—deepens. They are also more likely to enjoy their volunteer experience.

Yet, age stereotypes, lack of trust, and feelings of awkwardness often create barriers that prevent program participants from forming strong intergenerational bonds. For this reason, it is important that programs be designed to intentionally promote and support the building of relationships. No program can guarantee that a relationship will succeed, but it can maximize the potential for meaningful bonds to form.

This chapter is designed to help you create a program that fosters the development of intergenerational relationships. It looks at factors that influence different types of relationships, provides concrete strategies for developing and maintaining fulfilling relationships among participants, and examines ways to end relationships, whether the ending is planned or unplanned, so that they remain positive and rewarding experiences.

Factors that Influence Relationships

Intergenerational programs produce many different types of relationships that can vary considerably in intensity. The depth of the relationships forged in your program is likely to be affected by a number of factors.

Level of Engagement

One predictor of the extent to which participants in a program are likely to form close relationships is their level of engagement (see Chapter 2). As a general rule, participants in programs with low levels of engagement (e.g., one-time group events) are less likely to form strong bonds than participants in programs with high levels of engagement (e.g., long-term, one-to-one programs).

Levels of engagement are often dictated by program goals. For example, the success of most academic tutoring programs depends on the development of consistent and long-lasting relationships between students and their tutors—emotional closeness is not a critical component of these relationships. Yet, for other programs, such as a mentoring program designed to provide teen mothers with parenting skills, emotional closeness is the primary vehicle for achieving the program's goals. The more intense and sustained you want the intergenerational relationships to be, the more planning and effort are needed on the program end to establish and support these relationships.

It is important to point out that many "low engagement" group programs also produce friendships that are productive and meaningful—even if not long-term and "significant." The Groundwork Yonkers Green Team gardening project illustrates this point well. In this program, old and young residents of a depressed neighborhood collectively designed and built a community garden. Before the project, generations rarely interacted, and there had been mutual distrust between young and old; collaborating to help the neighborhood changed that dynamic.

Direction of Service

Relationships also vary by direction of service. Intergenerational programs are typically described in terms of four service models: young serving old, old serving young, old and young serving together, and young and old receiving service together (again,

No matter what we're doing, whether it's painting or gardening, it's to make that connection between the older generation and the younger generation. It affects the kids greatly; they see progress, something they had their hands on. And they change.
—Older Green Team member

We learn more because they're older. They'll let us know what happened to them and what we can do to change our lives.
—Younger Green Team member

see Chapter 2). Each service model tends to produce different types of relationships. Older adults share their life experiences and knowledge. Their commitments to the relationship are often long-lasting, and they have a significant impact on the lives of the young people whom they serve. Younger people in service to older adults bring energy, affection, appreciation for the adults' accomplishments, and a fresh perspective about contemporary life. Older and younger people who serve together have the greatest opportunity to view the concept of "peer" differently. They are colleagues who collaborate to help their communities. The feeling of accomplishment enhances their self-respect and their respect for the other generation. Old and young who receive care together, such as in a shared-site day care, have enhanced service experiences.

How Participants Are Prepared for Their New Relationships

The level of engagement will determine the amount of preparation you do with participants, and direction of service will influence specific preparation activities. However, regardless of intensity or direction of service, your program should take steps to create a climate with the following characteristics:

- Participants feel comfortable with one another
- Participants treat one another with respect
- Participants communicate openly and honestly
- Participants believe they can trust one another and that they are trusted
- Participants find ways to contribute to the relationship and one another
- Participants are empathetic, without being patronizing or pitying
- Participants acknowledge commonalities and differences
- Participants avoid being judgmental
- Participants believe that the relationship has been positive when it comes to an end

In Chapter 7, we discussed the importance of providing all volunteers with a pre-service orientation and ongoing in-service trainings. Although service recipients don't receive the level of training that volunteers do, they need to be fully oriented to the program. All participants, volunteers and service recipients alike, should be made aware of the scope and limitations of the program; this will help prevent and manage misunderstandings down the line. Whether in individual meetings or in group sessions, one of the primary goals should be to help prepare participants for their new relationships. Some of the key issues to address are discussed below.

Expectations

Make sure that participants have realistic expectations for what they (personally) and the program (as a whole) will be able to achieve. Provide them with a clear description of what they will be doing, whom they will be doing it for (or with), and the staff supports that will be available to them. Explain that the intergenerational relationship is not a panacea for an individual's or a community's problems. Help participants define success in small doses.

Redefining Success

A reading tutor became frustrated and angry when her student was not keeping up with his classmates in following all the reading assignments. Staff members looked into the matter and discovered that although the student was not reading as much as his classmates, he was reading on his own—at least twice a week. The staff reframed the child's reading behavior for the tutor. Instead of comparing the child to the rest of the class, they encouraged the tutor to compare the student with his past performance. The tutor was then able to see what she and the student had accomplished together.

Participants should also be reminded that relationships take time to grow. The amount of time it takes for people to feel comfortable with and close to one another will vary, depending on the populations involved and their roles. For example, children and older adults who work together on a community garden may feel like "buddies" within a few weeks. It may take only a month or two for families to feel close to their student respite care workers. Yet, it usually takes at least six months for strong bonds to develop between mentors and their mentees.

Confidentiality

Most agencies have in place a set of guidelines designed to protect the privacy of the people they serve. Volunteers working in these agencies are often expected to adhere to these guidelines as well. Service recipients must feel entirely confident that the volunteers with whom they work will respect their privacy. Violating confidentiality may damage a relationship and put the agency at risk.

There isn't one uniform confidentiality policy that can be applied to all intergenerational programs and relationships. Concerns about confidentiality are most relevant in situations that involve high levels of engagement and/or where volunteers have access to sensitive information, such as social services, school, or health records. In the latter case, volunteers serve as agency representatives and are therefore subject to the same confidentiality restrictions as paid staff. This typically means that they cannot share identifying information about the service recipient with anyone other than program staff.

Yet, in some cases, strict confidentiality standards are inappropriate or difficult to apply. For example, the success of an oral history project depends on the willingness of older adults to share personal information that will, in turn, be shared with others. In this case, consider asking the adults being interviewed to sign a simple disclosure waiver. Similarly, mentor-mentee relationships are intended to develop into friendships, and it's not unusual for a mentor to introduce his mentee to friends and family as part of this process. In this case, program staff should spend time discussing with mentors how they will manage sensitive and private information that should not be disclosed beyond program boundaries.

It is critical that you discuss your program's confidentiality and privacy guidelines at your pre-service training and at subsequent in-service meetings. Make sure that your program's policy manual includes a statement about confidentiality. Many programs also require their volunteers to sign a confidentiality agreement, witnessed by their service recipients. Finally, make sure to emphasize that confidentiality goes both ways; remind recipients that they, too, must respect the privacy of their volunteers.

Diversity

It is more likely than not that the participants in your program will hold differing, and sometimes conflicting, values, attitudes, and beliefs. How you—and they—handle these differences will have a profound effect on the relationships that develop. When addressing issues of diversity, consider the following:

- *Values.* Sometimes people—particularly older adults—become volunteers because they want to influence a young person's moral development (e.g., prevent young people from using drugs, encourage them to stay in school and to postpone sexual activity). Yet, adults may be matched with young people who already engage in these behaviors. If a young person feels like the volunteer disapproves of him or her, trust will not develop, and the relationship will fail. It is up to the volunteer to let the young person know that the volunteer will be there for the child, even if the volunteer disapproves of his or her behavior.

  Programs that deal with such issues as teen pregnancy, gang participation, and drug use should provide volunteers with expert training on how to effectively talk with young people about these sensitive topics.

When Values Are Challenged

One mentor described how he dealt with a situation where he let a mentee know that he disapproved of his behavior but kept the relationship strong:

> *My mentee got a girl pregnant. We had talked about this before—how important it was for him to avoid this very situation. I stayed calm. I let him know very clearly that I was disappointed. But then we moved on. He told me that he would assume his responsibilities as a father. We talked about where he would go from here: how he can meet his new responsibilities and still keep in mind the goals he has had for himself.... Things are working out with him and with his family.*

- *Religion.* Many people volunteer as a way to express their religious faith. It is important that these volunteers understand that they cannot use religious language or imagery to attempt to influence a service recipient's behavior or attitudes. In the event that a service recipient who is a minor asks to share a religious experience with a volunteer (such as going to a prayer meeting), the volunteer should first run this by the program staff, then by the youth's parents.

- *Cultural diversity.* Program participants should be encouraged to learn about the values and traditions of one another's cultures. Ethnic groups often differ in their attitudes toward health and illness, their perspectives on time, their attitudes toward providing and receiving volunteer service, and their approaches to handling conflict. Programs should provide forums for participants to discuss their cultural differences. Learning about these differences can provide insights into behaviors that affect relationships.

- *Generational diversity.* Generational culture can also play a powerful role in shaping how people think about and act toward people who are older or younger than themselves. For example, many older adults share the ageist perception that today's young are more "outrageous" than they were at the same age. Similarly, many young people expect older adults to be sickly and "rigid." By addressing these perceptions early on, program staff can help intergenerational participants recognize their commonalities and appreciate their differences. Keep in mind that it is important to sensitize participants to any special needs of the populations they'll be working with.

Communication Styles

Strong relationships depend on trust. One way to promote trust is for both parties to be respectful of one another's communication boundaries, particularly at the beginning of a relationship. Individuals in new relationships tend to communicate more superficially. As they grow closer and the bond between them deepens, communication will become more open and include topics that are more personal.

To facilitate communication, volunteers should take their cues from the person to whom they are providing service. If a volunteer pries too deeply, too soon, the person receiving service is apt to shut down. Volunteers should also be reminded that topics that may be easy for one person to discuss may raise red flags for another. For example, talking about family may be easy for a mentor who has fond childhood memories, but more difficult for a mentee whose family is experiencing a lot of conflict.

Volunteers should be sensitive to how they engage service recipients in conversations on personal topics, moving gradually from less to more intimate levels of discussion and providing comfortable "outs" for service recipients who may not want to discuss a particular topic. Volunteers can also ease movement between levels of communication by being willing to personally share at the same level at which they are asking questions. Relationships may deepen more quickly when a volunteer responds with sensitivity during a crisis.

A Mentor Opens Up

A 13-year-old mentee describes how his mentor used just the right approach to communicate with him at a very difficult time:

> My mom died this year, and my mentor came to be with me the very next day after he found out. He talked to me about when his mom died when he was just my age and how sad he was and how angry he was. He said he never really got over it because he didn't have anybody to talk to or help him out. That's when he started doing drugs and getting into trouble. He said he was going to make sure that didn't happen to me. He was right there for me, and he never let me down. I know I don't have to mess up my head with drugs to feel okay. I've got better things to do.

How Participants Are Matched

Many intergenerational programs involve creating one-to-one matches between older adults and young people or families. The more effective you are in matching compatible participants, the better the chances that your program will succeed. You will also prevent participants from feeling aggravated and save staff time spent repairing poor matches. Below are some suggestions for intergenerational matching.

Pay Attention to Logistics!

Incompatible schedules or transportation problems can stand in the way of the most promising intergenerational relationships. Geographic proximity is especially important when making a one-to-one match that will require older adults to travel—even the most committed volunteer may have a hard time trekking across town to meet regularly with a young mentee. If you think that a particular older person and youth will otherwise make a great pair, talk with them about their willingness and ability to overcome any logistical challenges before making the match.

Look for Natural Pairings

Some one-to-one programs provide opportunities for youth and older adults to meet as a group before they are paired. During these meetings, conduct structured activities that encourage people to interact across generations, for example, having individuals interview one another about specific topics, talk about what is best and worst about being their current age, or exchange photographs. Inevitably, certain natural pairings between the older adults and youth will occur. Make a note of them and, if it is logistically possible, match up these pairs. The number of pre-match sessions should be higher for programs that involve higher levels of engagement. For example, an intensive mentoring program might require four to six "getting to know you" sessions, while a program involving group visits to a nursing home would require only one or two.

Conduct Individual Assessments

If your program does not include a pre-matching activity, have staff conduct one-to-one interviews with participants to assess their abilities and preferences. Ask questions that make sense for your program. For example, if volunteers will be making home visits, find out if they would mind being matched with a family whose house is not kept clean.

Match Ability with Need

For example, a volunteer who has arthritis in her knees may not be a good match for a young child who is hyperactive. However, the same volunteer, who may be especially warm and empathetic, would be perfectly suited to a child who has physical limitations and needs emotional support.

Brief Participants About Their New Partners

Meet with each participant separately to talk about the match. Be sure to talk to the volunteer first before notifying the potential partner. This gives the volunteer an opportunity to turn down an assignment without hurting the service recipient's feelings. Discuss any limitations, such as physical disabilities, that might affect the partners' interactions. For volunteers who will provide service, describe any significant challenges they will need to address as part of their work. But don't overstate special needs—you don't want to stigmatize the potential partner. Also, don't include too much personal history in these briefings; leave it to the partners to share these stories as their relationship evolves.

The process of matching volunteers with appropriate students is a little bit like running a computer dating service.
—Program coordinator

I always tell families who want a student respite worker that the more flexible they are, the more readily they will get a student to come and be with them.
—Program director

Demonstrate Confidence that the Relationship Will Work

Explain your reasons for making the match and why you believe the pairing is a good one. The more enthusiastic you are, the more excited each partner will be about the relationship.

Be There When Partners First Meet

Have a staff person facilitate the introductions and review the role of the volunteer. Have both parties describe their expectations for the match, the kinds of things they hope to do together, and how they see the match working. Be encouraging, but also remain open to their concerns.

Follow Up

Check in privately with each member of the match soon after the first meeting. For programs with higher levels of engagement, touch base with both members of the match once a week for the first month.

Be Willing to Make a Change

If things don't "gel," consider matching participants with new partners. Remind participants that this sometimes happens and is nobody's fault. Then facilitate an ending that is as painless as possible. (Strategies for doing so are discussed later in this chapter.)

Facilitating One-to-One Relationships

Volunteers often become discouraged when the people they work with appear to be unresponsive. For example, mentors may feel frustrated and rejected when their mentees don't return their calls. Here are two suggestions for mitigating this problem:

• Remind adult volunteers—especially those who work with vulnerable youth or troubled families—that they have the primary responsibility for getting the relationship off the ground. They may need to be especially patient and persistent with youth or families who might have a hard time trusting new relationships (e.g., children who have histories of being abused by adults, and families that have received extensive social services). Volunteers who understand that resistance is normal are less likely to lose patience and take the resistance personally.

• Remind youth and families that relationships are a two-way street. They must participate in the relationship by initiating and returning calls, showing up as expected, notifying the volunteers in advance if they have to miss an appointment, and being respectful of their volunteers' personal needs. The more they put into the relationship, the more they will get out of it.

Helping Relationships Thrive

Once you have oriented participants and tried to make the right match between volunteers and service recipients, some relationships will bloom spontaneously. Others, however, will not come so easily, and therefore it's a good idea to offer ongoing support. Below are some strategies you can employ to help participants in your program form and maintain strong bonds.

Provide Structure

Providing structure and guidance for how participants spend their time together helps to nurture new relationships. Concrete tasks can alleviate some of the initial pressure participants might feel to relate on an intimate level, and allow them to ease more gradually into their relationships. Even after a relationship is well underway, planned activities—particularly those that encourage reflection—can be useful for helping to steer the relationship in new and exciting directions.

When older adults and youth first get together, they may want to simply sit together and talk. To facilitate these discussions, provide a list of discussion topics, as well as specific questions that the pair can ask each other. Then, over time, encourage them to try doing other kinds of things together. Provide information about local activities that are low-cost or free (remember, the purpose of your program is not for volunteers to be spending money). They may discover that, by being active together, intimate conversations will flow more naturally.

The Possibilities Are Limitless!

Visits to homebound elders can—and should—involve more than watching TV. Structured activities that a friendly visitor can do with an elder include:

- reading the daily paper
- assisting with correspondence
- doing jigsaw puzzles
- sharing family photographs
- doing low-impact exercise
- listening to and discussing music
- playing Scrabble or chess
- working on homework
- cooking
- working on a crafts project
- surfing the Internet

Many of these activities are fun for non-homebound pairs as well!

Solicit the Input of People Receiving Services

Service recipients must believe that they have a voice in shaping their relationships. They must feel confident that the program—and their volunteers—will encourage and respect their preferences, interests, and personal boundaries. Prior to orientation, have staff brainstorm areas where the program can offer participants maximum autonomy. For example, some mentoring programs invite their mentees to select the community service project they will participate in. Also, have service recipients and their volunteers sit down together and develop written goals for what they hope to achieve from the relationship and/or program.

Steps in Goal-Setting

STEP 1: Have the service recipient identify several positive things that he or she would like to accomplish, such as completing a general equivalency diploma, fighting less with siblings, or having a conversation in English with a grandchild.

STEP 2: Let person setting goals choose one or two goals that are achievable and particularly satisfying.

STEP 3: If the service recipient is a minor, discuss how the young person's parent or guardian may feel about these goals. Goals will be easier to achieve with the family's knowledge and support.

STEP 4: Together, brainstorm ways to reach a goal. Work together to create a plan that involves reaching the goal one step at a time.

STEP 5: Identify obstacles to meeting the goal, then work into your plan strategies for overcoming these obstacles.

STEP 6: Set a deadline for accomplishing the goal or evaluating your progress.

Provide Opportunities for Reflection

Set aside time for partners to think about and discuss how their relationship is evolving. Formalized reflection activities typically involve a facilitated group discussion that includes both generations. Possible questions for reflection include the following:

- How have your beliefs or perceptions about the other age group changed?
- What have you learned about yourself through the relationship or through the program?
- Has anything surprising happened in the program and/or relationship? Please explain.
- What has been most challenging about participating in the program? How have you addressed this challenge?

Other possibilities include collaborative poetry writing, doing improvisational theater or role plays, and sculpting or painting together.

Write Policies to Help Set Boundaries

Some simple written policies will help volunteers address issues—typically, financial ones—that could undermine the relationship. For example, volunteers often struggle with how much (if any) of their own money they should spend on program-related activities (such as food, entertainment fees, and gifts). To address this issue, many programs develop written policies around spending and personal loans (i.e., that loaning or giving money to service recipients is never allowed). This takes the pressure off the volunteer to spend his or her money. It also deflects any blame for saying "no" from the volunteer to the program. Another area that policies can address is transportation (i.e., whether volunteers can transport others in their own vehicles).

Keep an Eye on What's Going On

Staff should be vigilant in monitoring matches and assisting pairs in working together. Even the best of matches sometimes go through a rocky patch; staff should keep their antennae raised, to assess when things are running smoothly and when they are not. The best way to stay on top of how relationships are progressing is through regular in-service meetings and phone contact with volunteers. (Staff should also call service recipients or their parents or caregivers, but not as often.) Invite people to talk openly about problems. Some participants may feel embarrassed by the challenges they face and may think that they have to put on a good face. Others may think that if they share a problem with staff or at an in-service meeting, they are violating confidentiality. Remind them that confidentiality rules do not include restrictions on talking to staff.

Empower Volunteers to Solve Their Own Problems

Most of the problems shared with staff (or that staff uncover) are minor and are best resolved by the participants themselves. Use in-service training and supervision sessions as opportunities to strengthen participants' problem-solving skills. When a volunteer raises a problem, resist the temptation to intervene or provide a solution. Instead, ask questions that will stimulate participants to explore various points of view and solutions.

If we go in and rush to solve the volunteers' problems, they're going to learn that this is how you expect them to treat the person they work with. That just undermines the program. The last thing you want volunteers to do is say to a service recipient, "You really should do this," or, "You really ought to do that."
—Volunteer coordinator

COURTESY OF GENERATIONS UNITED

A Call to Action

When serious issues arise, staff may need to intervene directly. Below are some strategies for addressing serious challenges that may arise.

PROBLEM: Children in a community garden program are all attracted to the most active and fun elder. The other participating elders feel left out and rejected.

STRATEGY: Include icebreaker activities at the beginning of each meeting (especially the early sessions), which will help all the participants mingle and put them at ease. Also, divide the group into smaller teams that work together for multiple sessions or over the course of the program.

PROBLEM: A service recipient complains that his volunteer is always criticizing his behavior.

STRATEGY: Talk to the volunteer about the complaint, and listen to his side of the story. If he does sound critical, consider this response: "You know, it almost sounds like you don't like the person you're working with. Do you think he might be getting that impression as well?"

PROBLEM: A service recipient is unresponsive, doesn't keep appointments, and doesn't put any effort into maintaining contact.

STRATEGY: Praise the volunteer for his efforts, but remind him that he has primary responsibility for getting the relationship off the ground. Acknowledge that doing so takes persistence and patience and that it can be stressful and disappointing when things don't work out right away. If you assess that the process is taking too long to resolve, contact the service recipient to find out what is going on, and review the program's expectations for participants. If needed, have a meeting with both the volunteer and the service recipient to discuss how they will continue to work together. If the problem persists, consider re-matching the participants.

PROBLEM: A volunteer tries to push her beliefs and/or agenda on a service recipient, such as religious beliefs or the type of activities the two will do together.

STRATEGY: Try to get the volunteer to discuss this at an in-service meeting. Feedback from other volunteers will help her understand why this behavior is inappropriate. Ask the volunteer how she would feel if someone repeatedly asked her to do something that was contrary to her own beliefs.

PROBLEM: Partners enjoy each other socially but are not making progress on any substantive goals.

STRATEGY: Meet with the volunteer to remind him of the program's purpose. Provide him with tools, such as a goal worksheet and a timeline that he can complete with his service recipient.

PROBLEM: A volunteer tells you that she dislikes her service recipient and wants a new partner.

STRATEGY: Explore this further. Is this a case of miscommunication or a genuine personality clash? Talk with each person individually, then together. See if this is an issue that can be resolved over time, or if it is indeed time to find new partners. (See the section titled "When Relationships End" for tips on bringing a relationship to closure.)

Involve Family Members

Buy-in from the families of service recipients is key to promoting strong intergenerational relationships, so involve the parents of youth or caregivers of participating frail elders as appropriate. Family members who don't understand what a program is about may feel threatened by their child's or parent's new relationship. Families who understand a program's potential benefits are more likely to encourage the relationship and reinforce program goals. Strategies for involving parents and other family members include the following:

- Hold orientation meetings for parents of young people who are participating in ongoing programs. Review the program's goals and activities, discuss the roles of everyone involved, give a tour when appropriate (for example, for a nursing home visitation program), and provide contact information. Encourage parents to call staff with questions or concerns as they arise.

- Disseminate written information that describes the program, project, and associated activities; reviews the program schedule or timeline; and includes contact information.

- Host special events that include family members and friends, such as holiday parties, skating or bowling, and workshops on identified topics of interest.

- Check in regularly with parents or caregivers to find out how things are going with the program and to solicit questions. These calls may be more frequent for family members who do not attend special events or when there is a problem with the service recipient's participation.

Model Healthy and Respectful Relationships

The most important way for staff to promote strong intergenerational relationships is by modeling the behaviors, values, and emotions they hope to see reflected in these relationships. Staff must be active listeners, trusting and trustworthy, nurturing, and honest, and they must demonstrate good problem-solving skills, as well as respect for and interest in the participants. For example, they should return phone calls promptly and provide any information that is requested. By building strong relationships with program participants, they are easing the way for elders and youth or families to bond with one another.

When Relationships End

Most intergenerational relationships eventually come to an end. The quality of these endings can have a significant effect on how the participants feel about the relationship over time and their openness to forming new relationships—intergenerational or otherwise. Relationships can end for any number of reasons: the project or assignment is over; the match has been so successful that the service recipient no longer requires services; the volunteer or service recipient has outgrown the program; or participants move away, become ill, or die. Sometimes relationships end because they have been unsatisfying or unsuccessful for the participants. Below are some strategies for making endings—whether anticipated or unanticipated—as positive for the participants as possible.

Anticipated Endings

Most intergenerational programs are designed to take place over a fixed period of time. Strategies for preparing participants for anticipated endings include the following:

- *Providing participants with a program timeline* so that they are not surprised when the program reaches its conclusion.

- *Reviewing goals periodically and documenting progress.* This helps participants remember what they accomplished together.

- *Scheduling structured reflection.* Though reflection should take place over the course of a relationship, it is especially important for enhancing learning and achieving closure at the conclusion of a program experience. Guide participants through discussions of what they learned from the program, how they grew, challenges they faced and how they overcame them, what the program and/or relationship meant to them, and how they will apply their learnings to future relationships and endeavors. Have participants reflect on how they feel about the upcoming separation and discuss meaningful ways to say goodbye.

- *Exchanging mementos.* Encourage intergenerational partners to give one another a souvenir of their relationship. For example, provide partners with two photographs of the pair together and picture frames that they can decorate for each other.

- *Celebrating!* When a project or relationship ends because it has run its course, it is important to publicly acknowledge and celebrate its achievements. Invite participants and their families to a good-bye party or "graduation" ceremony. Emphasize the positive aspects of the program or relationship, so that participants end with feelings of hope and satisfaction.

- *Following up.* When a participant is upset at a program's ending, contact him or her to provide needed support and referrals. Assess if it is appropriate for the participant to continue in the program with a new partner.

Post-Program Relationships

Should relationships end when a program ends? Not necessarily. One way to encourage the continuation of these relationships is to provide participants with contact information for one another. To motivate future visitations, one long-term care facility sends letters to the parents of former program participants describing visiting procedures and volunteer opportunities. However, caution participants against promising to "stay in touch" unless they are absolutely sure they will follow up. Unfulfilled promises can cause both older adults and youth to feel rejected and let down.

Sometimes, when a term of service or a time-limited project ends, service recipients are still eligible for services. In these cases, remind them (and their departing volunteers) that a new group of volunteers will be coming on board. Knowing this can help to alleviate any feelings of guilt the volunteers might have about leaving the program and can provide consolation to the service recipient.

Unanticipated Endings

Unanticipated endings are often more difficult to accept than those that are planned for, since they typically stem from negative circumstances, such as troubled relationships, illness, or death.

Troubled Relationships

Sometimes relationships just don't work out. In these cases, the volunteer, service recipient, and/or staff might decide that the relationship should not continue. To prepare for this type of ending, staff should facilitate three meetings: one with the volunteer, one with the service recipient, and (lastly) one with both individuals together. When a child is involved, another adult besides the staff member, such as a parent, guardian, or teacher, should also be present at these meetings.

The purpose of the individual meetings is to provide participants with a safe, private space to learn about and react to the ending, and to help them prepare for the joint meeting. Have participants talk honestly about the relationship and the other person—both the good and the bad. If their responses are all negative, hear them out, as they may need to vent, then help them reframe their criticism so that their final meeting will be constructive and supportive.

At the final meeting, invite both participants to talk honestly about their experience, but make sure that they leave with some positive feelings about themselves and, hopefully, about their partner. Help the participants give each other positive and constructive feedback and reflect on what they learned from the relationship. Talk with them about their plans—what they'd like to get out of the program (if they continue) or what else they'd like to have happen in their lives (if they do not). Finally, ask them what the staff or program could have done differently to have made their experience more successful. By saying this, you're letting them know that this isn't their fault and that the burden for the relationship doesn't rest entirely on their shoulders.

Life Changes

Sometimes participants leave programs because of unanticipated life changes, such as relocation, increased family responsibilities, or declining health. When this occurs, consider doing the following:

- See if there are ways to maintain the relationship despite these changes. For example, if a family support volunteer is moving away, he or she might want to occasionally correspond with the family the volunteer worked with. Or, a college student might continue to make "home" visits to an older adult who has been relocated to a nursing home.

- If a change of roles is not possible, see if there's a way for the participants to formally say good-bye, either in person or by mail. Encourage participants to talk about all that was good about the relationship. This will make it easier for the remaining participant to continue in the program with a new partner. (The departing participant can also be coached to encourage the partner to stick with the program.)

- Make every effort to find a new partner for the remaining participant. Staff may need to provide extra support to help the new partners form a bond.

I used to visit somebody; she passed away a couple of weeks ago. It was really sad because I was seeing her every other week. I was in shock because it didn't seem like anything was wrong with her. The staff told me that she had gotten up in the morning and she took a nap in the middle of the day and she passed away. I'm OK, but I miss her. But I visited somebody else and that makes me feel good.
—Sixth-grader in a nursing home visitation program

Participant Death

Sometimes participants in intergenerational programs die—usually, the older adult participants. You may be able to anticipate this occurrence—for example, if the population your program serves is particularly sick or frail. In these cases, you can help young volunteers prepare by talking about this possibility during your volunteer training or orientation (e.g., discussing the fact that this group of older adults is nearing the end of life and that death is natural). Yet, when it happens, the death of a friend is shocking, scary, and sad—particularly when participants have been involved with one another for long periods of time and have formed strong bonds. Steps you can take to help younger volunteers cope with the death of an older partner include the following:

- Inform the young person about the death privately. Let the youth know that it is all right to be upset. Remember and discuss the things the two of them enjoyed together. If this is a school-based program, involve the school counselor in the discussion.

- Inform the parents of the young person(s) who was closest to the adult. If this was a group program, consider sending a note to all participants' parents saying that there was a loss.

- If the young person was working on a project for or about the older person, such as an oral history, encourage the youth to complete the project and present it to the older adult's family.

- Check in with the young person a few weeks after the death to see how he or she is doing. For many children, this may be their first experience dealing with death.

- Have the youth group leader talk with the whole group about the individual who died. If the program is school-based, have the school counselor co-facilitate. This can lead to a general discussion about the end of life.

- Be honest without being disturbing when answering questions about a participant's death. See if there is something you can share about the adult's death that is both honest and uplifting, such as, "She died peacefully," or, "He had his family with him." Tell the young person that he or she was among the last new friends the older adult ever made and that this is a gift the young person gave to the older adult.

- Consult with the young person's parents if he or she expresses interest in attending the funeral. If the parents are unable to attend, perhaps a staff member could accompany the young person.

- Make arrangements for the young person to be matched with a new partner as soon as possible, if it is feasible and deemed appropriate.

Methods for supporting an older person when the child that he or she is working with dies are somewhat different. Because the person who is grieving is an adult, it may be perceived as patronizing for staff to offer the kinds of structured support they would offer to young people. Yet, because the death of a child may be especially painful, adult volunteers may need extensive informal support from staff and from other volunteers when it happens. Let volunteers know that you are available to talk with them. Encourage other volunteers to call them as well. Ask volunteers if they would like a staff member or another volunteer to accompany them to the child's funeral. Check in a few weeks after the funeral to see how things are going. Then leave it up to the volunteer to determine if and when he or she is matched with another child.

In Closing

Intergenerational programs can produce very rich and meaningful relationships, though getting to that point can require patience and commitment from everyone involved—staff, younger participants, and older participants. But the pay-off is substantial: affection from one who was previously unknown; increased knowledge and sensitivity; and a new appreciation for people like and unlike themselves.

A Profound Impact

A sixth grade school teacher described the deep impression that participation in an oral history project with nursing home residents made on his students:

> It's one thing to see older people, but when [my students] worked with them and talked with them and listened to them and heard their pain and suffering—as well as the joys they had in their life—they gained a lot more from that than from anything I could do in the classroom. They witnessed . . . the struggles these people went through every day. It changed them as people, and they became more mature. I think they were kinder to each other. The special bonding that occurred was probably the best thing that happened to the kids. And I honestly think that will last forever. It will stay with them as a treasure that they learned in school.

IN THE **CD-ROM Toolbox**

- **Goal Setting in an Intergenerational Relationship**
- **Sample Statement of Understanding between Volunteer and Service Recipient**
- **Training Materials on Communication**
- **Links to Chapter 9 Resources**

Resources

The Center for Intergenerational Learning at Temple University has produced the *Elder Mentor Handbook* (1993)—a basic "what you need to know" resource for elder mentors working with at-risk youth. The handbook presents useful information on child development issues, offers tips for effective communication, and suggests activities. For more information or to order a copy, visit the Center for Intergenerational Learning Web site at www.temple.edu/cil/ResourcesProducts.html.

The *National Mentoring Partnership's Web site* (www.mentoring.org/) includes very helpful materials for guiding mentor relationships. In particular, see the Toolkit and the "Ask an Expert" section for answers to previously asked questions or to ask a question yourself.

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Chapter 10

Organizing Intergenerational Group Activities

When I heard all about the things these older people have been through, it gave me hope that I'll be able to handle the hard parts of life.

—Youth involved in
   oral history project

Many intergenerational programs involve group activities. Sometimes, the full project is built around group interactions. Other times, group activities are used to kick off a program in which older adults and younger people are ultimately paired. With fun group activities in which all participants share roles, people from different generations can quickly see their commonalities and connect with one another.

The previous chapter centered on approaches for building one-to-one relationships. Group activities offer you another powerful strategy for bringing people together. This chapter includes guidelines for facilitating group programs and tips for group activities. It also provides concrete ideas about how to integrate the arts and humanities into short- and long-term intergenerational programs. The CD-ROM Toolbox includes numerous structured activities that you can use or adapt for a variety of groups.

Simple Ideas for Group Activities

- Cooking/nutrition projects
- Computer lessons and e-mail pen-pals
- Nature walks
- Men's and women's groups
- Exercise, dance and movement activities

- Discussion of current events
- Book clubs
- Storytelling/oral history
- Age collage
- Photo exchanges

SETTING UP A GROUP ACTIVITY

Group activities can greatly enhance the sense of unity among participants, and project staff—and they can also be a lot of fun. As always, careful planning and awareness of the motivations and desires of all age groups are key to your success.

The following guidelines will help ensure that participants in your group activity communicate effectively, feel comfortable with one another, and develop trust and understanding:

- Make sure that the activity you select will achieve the program goals you have identified (e.g., building trust, teaching a skill, promoting self-disclosure, increasing communication)
- Involve participants in planning activities in order to increase their investment
- Engage participants in roles that are developmentally appropriate and meaningful
- Provide opportunities for participants of all ages to share their knowledge, skills, and talents with one another
- Balance structure with informal interaction
- Allow time to "process" the activity (i.e., engage in a discussion of what participants learned about themselves and others)

TIPS FOR INTERGENERATIONAL GROUP ACTIVITIES

The following practical ideas will help your group activity run smoothly:

Orient youth and elders separately before bringing them together. Orientation should include a discussion of both groups' roles and the project's time frame, and an exploration of attitudes toward the other generation.

Use name tags. Participants should wear easy-to-read name tags throughout the course of a project, which will help them avoid the embarrassment of forgetting someone's name. People also feel more connected to one another when they are called, and call others, by their names.

Include icebreakers—short (5 to 10 minutes), light-hearted activities designed to help people feel energized and at ease. These often include innovative ways for participants to learn one another's names and to introduce themselves to the group.

Include activities that foster in-depth communication among participants. For example, have pairs of participants interview one another about a specific topic, then have each person report back to the group something that he or she learned. Engaging all ages in decision-making or problem-solving activities can also build solidarity among group members.

Provide opportunities for long-term collaboration. For example, consider having participants work as a team to create a piece of artwork, build a community garden, or write a history of a neighborhood.

Keep in mind the physical capabilities of participants. For example, if painting a mural, have chairs and step stools on hand as some older adults may not be able to stand for extended periods, and young children cannot reach high up. Throughout the project, provide mechanisms to ensure that cross-age collaboration happens.

Group Facilitation

Group activities need strong facilitators who will play a key role in implementing group activities and take on the following responsibilities:

- Informing participants of the day's agenda
- Working with the group to establish ground rules
- Helping youth and elders come together as a group and relate comfortably to one another
- Directing the group toward its goals and keeping it on task
- Helping youth and elders part from one another comfortably
- Ensuring everyone's participation

Who Facilitates?

Intergenerational group activities may be facilitated by a staff member from a participating organization, an outside consultant, and/or an experienced volunteer. These persons may facilitate individually or as a team. Look for the following attributes in your facilitator:

- Enthusiasm, warmth, and caring

- Skills in communication and group leadership

- Awareness of his or her own personal values and attitudes toward youth and older adults

- Knowledge of human development

- An understanding of the needs and capabilities of the participant populations

What Should a Facilitator Do?

Facilitators have a complicated job: ensuring that the participants are informed about and prepared for the project, that the activity runs on time, and that every member of the group is engaged and comfortable. Here are some ideas for pulling it off:

Be the facilitator, not a group member. Rather than participate in the group activity, continue to observe and direct the group.

Be prepared. Review the goals of the activity, and "walk through" it in your mind. Make sure that you have all the supplies you need.

Arrange the space where the group will meet. The seating should be arranged to make it as easy as possible for people to interact with one another and complete the program task. Make sure that the facilities are in good order and that any equipment you plan to use is ready to go.

Take a few moments to relax before the group begins.

Welcome participants as they arrive.

Clarify participants' expectations. This will help to ensure that everyone has similar goals for the day.

Use your strengths and foibles to your advantage. If you are funny, be funny. If you are dramatic, be flamboyant. If you are shy, let the group know, and discuss how people get over shyness to make connections.

Keep your finger on the pulse of the group. Notice participants' level of involvement and listen to what the group is telling you. Be aware of body language, yawns, and side conversations for signs of how involved your group is. Ask participants how they are feeling, and ask yourself what you are feeling.

Be flexible with your agenda. If the group is deeply involved in one activity, stick with it and skip the next agenda item. If the group is bored or restless, move on to another activity or take a break.

Be inclusive. Politely cut off those who monopolize a discussion or activity, and ask quieter participants if there is something they would like to add or do.

Set appropriate limits. While the expression of feelings and emotions may be very satisfying to some participants, you should proceed cautiously. If someone expresses a strong emotion in a group or reveals sensitive or very personal information, decide whether you think it is appropriate to discuss it within the group. If not, gracefully move the focus away from these matters (e.g., "I think you and I might want to talk about that later, one on one. Let's keep the group discussion more general"). Make sure to either talk personally to the individual afterward or share the information with other involved staff who will follow up on it—don't leave the person hanging.

Seek feedback from group members after the activity. Informal feedback following each meeting will enable you to keep a pulse on how group members are getting along and determine whether any specific guidance is needed. Documentation of that feedback can also be used for program evaluation.

TIPS FOR GROUP ACTIVITIES WITH INFIRM ELDERS

You may want to organize a group activity involving older adults with physical and cognitive disabilities in a long-term care residential or day setting. If so, keep these special considerations in mind:

Sometimes the older participants may be sleepy and lethargic, while the young people are extremely energetic. Talk about these differences, and give the youth an activity that lets them burn off some of that energy while the adults watch. Then do an activity to gently energize the adults.

Sometimes an elder participant's cognitive abilities may seem to shift slightly from session to session, which can be frustrating for young people. Model for the students how to break an activity into steps or modify a task to make it simpler. Also, during the young people's orientation, tell them to expect that their partners may have both up and down days and that they may need to be patient, flexible, and creative so that they and their older partners can all enjoy their activity together. Encourage students to ask for guidance from the activities staff or their teachers if they are unsure about how to handle these changes.

Some participants may get irritable if over-stimulated. During orientation, role-play solutions for dealing with this problem, such as refocusing the resident's attention, giving the resident more physical space, or finding a quieter area to move to.

ENHANCING PROGRAMS THROUGH THE ARTS AND HUMANITIES

The arts and humanities entertain, engage, empower, enlighten, and educate. When young people and older adults collaborate as artists or historians, or explore the meaning of diversity through the humanities, age differences lose significance. These collaborations offer an exciting way for children and the elderly to learn about one another's lives and develop meaningful relationships.

The Arts

The arts can be the primary focus of a group project or can be used to enhance a partnership. You do not need a trained artist to incorporate the arts effectively. However, when an art teacher, a community artist, or a person trained in art therapy is involved, your projects can be more ambitious.

Music

Singing, drumming, clapping, finger-snapping—people respond to music. Young and old enjoy playing tambourines, maracas, wooden sticks, and drums. Generations who make music together get energized and, to the extent that they are able, may even get up and moving! If you can't find someone who is trained in leading music groups, do not give up. Find out if an enthusiastic volunteer, teacher, staff person, or parent would be willing to share some musical talents with your intergenerational group. Even if no one is available to play an instrument, you can learn how to lead music activities yourself, using recorded music.

Here are some strategies for using music in intergenerational group activities:

- When possible, enlist a music therapist to facilitate or help design your intergenerational groups. A music therapist will know the developmental needs and abilities of both age groups and how to use music to achieve the group's goals. Contact the American Music Therapy Association or a local university for recommendations.

- Look for grant sources to involve local musicians in your intergenerational groups. Check universities and music societies for community service programs that may send musicians or students to your setting free of charge.

- Plan structured programs. Find or create group "theme songs" to signal the beginning and end of sessions.

- Be an enthusiastic musical model, no matter what your musical skill or experience level is.

- Be sensitive to over-stimulating your participants. Music should not be too loud or go on for too long.

- Have the groups teach each other popular songs of their own generations.

- Make sure that the print on song sheets is readable.

- Sing in a vocal range that is comfortable for all ages.

- Use music with strong rhythms, such as Big Band, bluegrass, or world music, to entice movement.

- Bring props, such as parachutes, scarves, balls, or streamers, to encourage movement and communication.

- Adapt musical games (such as Name that Tune, Hot Potato, or Musical Chairs) to fit the needs of your group. Make sure tunes are representative of all ages.

- Create songs or raps together.
- Make sure that the instruments you use make a pleasing sound and will not break easily.
- Make instruments and create an orchestra.

Dramatic Arts

The use of the dramatic arts in intergenerational programs provides participants with a variety of opportunities:

- Trying out new roles and behaviors
- Using their imaginations
- Exploring and acknowledging the importance of fantasies
- Being playful
- Being permitted to do what they are often told not to do
- Being a different age, sex, and race from who they "usually" are
- Bringing to life images they would like to see in themselves
- Discovering how much everyone has in common, regardless of age and other apparent differences

Some activities are suggested below. As they range in complexity, you can tailor them to your group's skills and interests:

Warm-ups or icebreakers are brief full-group activities that are used to help people get to know one another and feel comfortable together. They break down barriers, get people involved, and promote laughter. Icebreakers should be used at the beginning of all projects but may also be used intermittently throughout a project to reinforce group cohesion. With icebreakers, the facilitator should explain each exercise in an uncomplicated, easy-to-understand fashion. Warm-ups are usually short, lasting approximately 15 minutes.

Games go one step farther than warm-ups. They involve participants in basic dramatic activities. A game should be simple to explain and easy to execute, and it should challenge participants on a slightly higher level than the warm-ups. Games are done in sub-groups of four to five people. Two to three games should generally last 30–40 minutes, total.

Scene work or role plays involve improvisation; they allow participants to explore a variety of personas. First, the audience imagines an issue or scenario. Next, two to four group members improvise (act out) a scene, based on this issue or scenario, in front of the group. Participants then discuss the scene as a group. Two to three scenes with discussion can be done in 25–35 minutes.

COURTESY OF GENERATIONS UNITED

Planned performances grow out of the experiences and expressions of participants and may be the culmination of a long-term project. Performances provide an opportunity to expound on individuals' personal histories or on the history of the intergenerational relationships that have developed over time. Performers have the opportunity to delve deeper into a character—to look at the nuances and shadings that make up the whole of a person. Final performances may or may not use a script; in either case, the performance should grow out of improvisational interactions done by group members over time.

Performances may comprise vignettes or be one cohesive play. Planned performances should be facilitated by a drama teacher or a consulting artist with experience in group work.

Improvisation

Many effective intergenerational drama activities are improvisational—the participants (actors) make things up on the spot as they go along. However, even though improvisation is unrehearsed and spontaneous, it is not unstructured. You will need a skilled facilitator to set parameters for the improvisational exercise and give clear instructions. The audience may also participate by suggesting topics or joining a scene.

Visual Arts

Whereas music and theater projects are typically done in large groups, the visual arts provide an opportunity for older adults and youth to feel a sense of individual accomplishment by collaborating on a tangible product. Smaller groups can work together on such activities as painting the adult's life story, sculpting tiles, creating paper or fabric quilt squares, painting photo frames, or building a miniature town. These projects help solidify relationships among the participants and also foster a strong sense of group identity when the artwork is assembled and displayed.

Visual arts projects give youth and elders a chance to help one another. If older adults do not have the physical ability to do artwork, they can still supply ideas and select content and colors. Others may be able to create art only with a student's help. Then again, many older adults are skilled in the visual arts; they can help students, particularly younger children, with drawing.

Here are some tips for using the visual arts in an intergenerational group project:

- Have a plan in advance that includes a list of the materials you will use. More ambitious projects require more time and planning.

- Create a thematic structure for art projects, rather than just handing supplies to participants and saying "Go!" The group will be more motivated when they choose a theme, such as "the seasons" or "favorite places."

- Keep your group a manageable size (i.e., 30 or fewer).

Dance and movement activities are also effective ways to help people of different ages and backgrounds connect.

- Choose materials that are easy to use and that enable participants to see immediate results. For example, magic markers make vivid pictures and don't require participants to press hard; manipulating clay is relaxing—even participants with limited abilities can push into and roll clay; colorful pipe cleaners can be made into shapes and mobiles; and watercolors and acrylic paints are easy to mix and dry quickly.

- Have materials ready ahead of time.

- Make sure that everyone wears appropriate clothing.

- Give clear demonstrations of techniques.

- Allow participants to be artists and to express themselves. Do not criticize the art or do the art for participants. If adults or youth need help, encourage them to help one another.

- Have adequate supplies for covering furniture and cleaning up afterward.

The Humanities

The "humanities" refers to the realms of human thought and culture, such as literature, philosophy, and history. Exploring these areas is a natural way to learn about different heritages and traditions. Multi-age discussion groups about literature, diversity, and contemporary issues can be intellectually challenging and stimulating to both old and young participants.

Poetry and Creative Writing

These programs are ideal intergenerational activities and tend to be attractive to teachers. Both creative and personal, poetry and writing uniquely tap cognitive and memory capacities through reminiscence and self-expression. They also allow for readings both inside and outside the participating institutions.

A poetry or creative writing project is well-suited as a one- or two-session group activity or as a longer-term project. The "Hand Poem" in the CD-ROM Toolbox is an example of a short-term intergenerational poetry program that is appropriate for all ages.

Poetry and creative writing programs offer several key benefits:

- They are easily adapted to a variety of activities and situations (pairs, small groups, or larger groups).

- They provide an opportunity for individuals to learn about one another and to establish a context and foundation for ongoing communication.

- They offer stimulation in the intellectual, creative, and emotional realms.

- They may focus on a wide variety of themes and subjects that encourage expression of participants' thoughts and feelings.

- They can be the focus of special events to which you can invite the entire community.

If conducting a community history, encourage the group to frame project in terms of "Our Community: Past, Present, and Future." This will enable participants to use the lessons of the past to plan the future.

Poetry and writing projects are most successful when they include the following key elements:

- The project is facilitated by an experienced poetry and writing teacher or a seasoned local poet. Contact your local arts council for recommendations. Ideally, the facilitator will have experience in conducting poetry or writing workshops with youth and/or older adults.

- Facilitators from all participating organizations agree on the goals of the program and set a schedule for large- and small-group activities. Activities should include readings by a variety of poets and brief discussions about the poems; a variety of fun, warm-up writing exercises that provide context and focus; and opportunities for participants to read what they've written.

- After one or two group sessions, pairs of participants (young and old) meet separately from the large group.

- Program leaders provide instructions and exercises for the one-to-one collaborative process (e.g., a youth can interview an older adult and write a poem based on the interview, or a youth and older adult could write a piece together).

- Once pairs are established, they schedule their own one-to-one sessions.

- The large group meets regularly to discuss the project and any barriers or problems.

- The program allows sufficient time for participants to create a body of work (i.e., four to eight one-to-one sessions).

- The project publishes a compilation of poems or writing, which is distributed to all participants.

- A reading is held for staff, families, and community members.

Oral History

Oral history—historical information gathered through interviews with participants—is a commonly implemented and exciting intergenerational activity. By recording individuals' recollections of the past for use in the future, the wisdom and experience of older generations is shared and preserved. The process provides the opportunity for the past to come alive and for young and old to gain insights into themselves and one another. It enables participants to reflect on which values are permanent and which are transitory. Oral history projects ensure the continuity of one's people and one's traditions. Bringing individuals from different backgrounds together to explore the past can foster cross-cultural understanding and strengthen communities.

Oral history projects are commonly featured in service-learning programs. They blend well with instruction and academic requirements in writing, history, social studies, science, art, and other areas. Here are some strategies for implementing oral history projects:

- Make sure that the conversation between the youth and the older adult is two-way. A common pitfall of oral history programs is that the young people learn about the older adults, but the older adults do not learn about the youth. Adults should be encouraged to ask the children questions—young people have histories, too. Even if the final product will focus on the older adult, one of the most valuable aspects of these projects is the opportunity for discussion, comparison, and reflection.

- Help students practice interviewing techniques. Emphasize how to make an interview conversational, using open-ended and follow-up questions. When young people have a pre-set list of closed-ended questions or do not follow up on the adults' answers, the conversation may become stilted. Spontaneous follow-up questions are an important demonstration of good listening.

- Remind students to be patient; they should not finish adults' sentences or interrupt. Adults may have to tell stories at a slower pace than students are accustomed to. If the student needs to move on to another question, the student should say, "Excuse me," and indicate the need to ask the next question.

- If working with a long-term care population, students should recognize that residents may not have the stamina for lengthy interviews. Several shorter interviews may be preferable.

- Older adults with cognitive impairments may be very good candidates for oral history projects. Long-term memories are the most long-lasting, and reminiscence is enjoyable. Memories may be provoked by old music or visual cues, such as photos. Questions should be kept simple, and interviewers should be prepared to be particularly patient.

- Memorabilia, such as photographs, documents, and heirlooms, can add depth to reminiscences and may be used to produce a scrapbook or memory box. It is very important that participants know how to handle these materials so that they are not damaged.

- Sometimes students record or videotape interviews. Depending on available resources and the need for exact quotations, this is a valuable technique. However, listening to a tape can be tedious, and transcription is time-consuming. If students take notes in longhand or on a computer, have them work in teams and take turns with interviewing and recording.

- Oral history projects frequently include a final product, such as a scrapbook, booklet, theater presentation, or painting. Consider involving the older adults in the creation of the product; this way, the adults and youth become collaborators.

- At the conclusion of an oral history project, have a party to celebrate the older adults' stories. Both students and adults should be invited to make speeches about their experiences with the project.
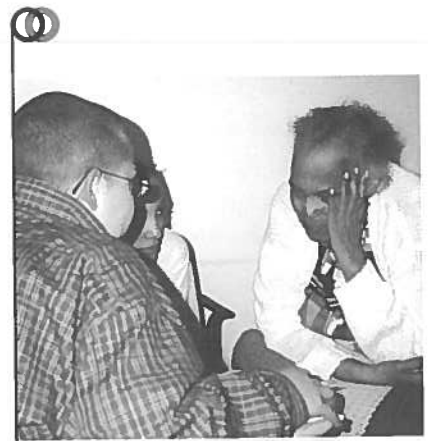
Dealing with Sensitive Topics

Many older adults have experienced multiple losses or traumas in their lives. The deaths of close family members, serious illnesses, or experiences with violence may be particularly difficult to discuss. Some people's religious or cultural backgrounds may increase their reticence to talk about sensitive topics. Yet, others may be eager to talk about personal matters; they may believe that students can learn from their experiences and/or they may enjoy the opportunity to talk honestly about something that is important to them.

These guidelines can help participants as they encounter sensitive issues:

- Make it clear to both adults and students that it is all right to avoid answering or asking any questions that make them uncomfortable.

- Suggest that pairs cover less personal subjects early on. As the students and adults get to know one another, conversations may naturally become more personal.

- Sensitive topics, such as the death of family members, should only be broached in an established relationship. When such topics arise spontaneously, the student should take cues from the resident. Students should respect adults' preferences, and propose alternate topics if necessary.

- When preparing young people to discuss sensitive topics, let them know that the adults may get upset. Students should be taught techniques for providing comfort and support. If the adult cries, the student should communicate that it is all right for the adult to do so. It is also all right if students cry along with their partners. The experience of sharing life's tragedies may be very meaningful to them both, giving older adults an opportunity to teach about life and be listened to, and giving students a chance to learn about resilience.

In Closing

Structured group activities are a great way to facilitate bonding between elders and youth, and they often provide the framework for an intergenerational program. The CD-ROM Toolbox describes icebreakers, games, and structured activities that you may use and adapt for your program. This chapter and the activities on the CD-ROM suggest just a few of the many ways that creative staff, volunteers, and program participants can plan stimulating and meaningful activities.

IN THE **CD-ROM Toolbox**

- **Icebreaker Activities for Intergenerational Groups**
- **Sample Group Activities**
- **Preserving Memorabilia by the National Endowment for the Humanities**
- **Sample Oral History Questions**
- **Links to Chapter 10 Resources**

RESOURCES

Generating Community: Intergenerational Partnerships Through the Expressive Arts by Susan Perlstein and Jeff Bliss (1994) describes innovative intergenerational arts programs implemented by Elders Share the Arts in New York and provides information about how to plan and implement your own creative arts project.
http://www.seniortheatre.com/html/theatre_with_purpose.html

The Intergenerational Activities Sourcebook, published by the Penn State Intergenerational Program at the College of Agricultural Sciences (2003), provides detailed instructions for 53 activities that can be used with diverse groups. You can purchase a hard copy or download the full Sourcebook online at no cost at intergenerational. cas.psu.edu/. A link to the Sourcebook is in the CD-ROM Toolbox.

The National Center for Creative Aging maintains a database of programs in arts and aging. Search the directory to get ideas about how you can use the arts to enhance your program.
www.creativeaging.org.

Bi-Folkal Productions, Inc. sells kits and tools for implementing creative and diverse approaches to oral history projects. www.bifolkal.org

REFERENCES

Bressler, J. (2002). *Open doors, open hearts: A guide to bringing long-term care residents and young people together.* Philadelphia, PA: Center for Intergenerational Learning, Temple University.

Perlstein, S., & Bliss, J (1994). *Generating community: Intergenerational partnerships through the expressive arts.* New York: Elders Share the Arts.

Chapter 11
Evaluating Your Program

Evaluation allows you to justify your existence, make your programs more credible to funding agencies, improve services, be more responsive to the community, and gather feedback about the effectiveness of services.
—Charles Mindel (2002)

While some would argue that people running intergenerational programs have an innate sense of whether their programs are working, intuition is neither objective nor reliable. For intergenerational programs to survive and thrive, they must be evaluated. A formal evaluation allows you to find out and document which pieces of your program are effective and which are not. It can help to explain both the expected and the unexpected benefits of your program. It can provide a road map for program improvement. It can also produce concrete data to share with key stakeholders whose interest and involvement is critical to your program's success.

This chapter is designed to introduce both novice and experienced intergenerational program planners to the language and methodology of evaluation. It is not meant to be a comprehensive guide to program evaluation. Rather, it highlights key elements that comprise an effective plan to evaluate an intergenerational program and the special issues that affect evaluations involving younger and older populations. Sample evaluation tools that are especially useful for evaluating intergenerational programs and that measure some of the concepts described in this chapter are included in the CD-ROM Toolbox.

WHY EVALUATE?

There are many reasons to evaluate your program. For example:

- To learn how well the program has worked
- To learn if the program was implemented as planned
- To improve program design or implementation
- To demonstrate the program's worth
- To meet funders' requirements
- To acquire additional funding
- To inform or advance fields of study
- To shape policy
- To avoid duplication of efforts
- To motivate staff
- To "sell" or market the program

You can reap some of these benefits with a simple survey of participant satisfaction. However, a more thorough and rigorous evaluation is likely to have a greater impact. The experience of Across Ages—an intergenerational mentoring program for preventing drug use—offers an illustration of how a well-executed evaluation can have a profound effect on the future of a program.

The Across Ages evaluation used a rigorous quasi-experimental design. Children from separate classrooms who were demographically similar to one another were assigned to one of three treatment groups. The first was assigned mentors and received several other services, the second received services but did not have mentors, and the third received neither services nor mentors.

A comparison of pre- and post-intervention data revealed that children in the first treatment group (mentors plus services) had more positive attitudes about themselves

and their schools, thought more about their own futures, were better able to cope with stress and anxiety, had better school attendance, and learned more new skills to help them react in safer, healthier ways in situations involving drug use than students in the other two groups (Taylor, LoSciuto, Fox, Hilbert, & Sonkowsky, 1999).

Based on these findings, Across Ages has been recognized as an evidence-based model approach by CSAP (Center for Substance Abuse Prevention) and other federal agencies and has been replicated in more than 40 communities. In 2002, the United Nations selected Across Ages to represent North America in its Compendium of Best Practices in Drug Prevention. Without the results of its objective and carefully designed evaluation, Across Ages never would have received this kind of recognition.

KINDS OF EVALUATION

Before you begin to plan your own evaluation, it is important to have an understanding of the key terms used in program evaluation. Process and outcomes are the aspects of your program that you will want to learn about. Data about both process and outcomes can be collected using quantitative and/or qualitative approaches.

Process and Outcome Evaluations

A **process** evaluation is one that attempts to understand what happens during the development and implementation of a program. It measures what your program provides and the characteristics of those who receive services. Process evaluation can provide an important context for understanding outcomes. It can help you understand why a program was, or was not, able to meet its goals.

Typical process data might describe the following:

- The number of program participants

- Demographic characteristics of the participants

- The hours of contact per month ("dosage")

- The amount of staff time devoted to program activities

- Attendance at events

- Participants' satisfaction with program services

- Barriers encountered during implementation

- Strategies used to overcome barriers

An evaluator interested in collecting process data about a program in which older adults and children are paired to work together on an environmental project might ask, "What were the most effective methods for recruiting participants?" or "How many hours did each intergenerational team spend working together on the project?"

An **outcome** evaluation measures the impact of a program, addressing crucial questions about program effectiveness by analyzing its immediate results and long-term impact. Outcomes assessed for the same environmental project might include changes in water quality and whether participants, old and young, have a different level of commitment to environmental causes. Typical outcome data measure *increases in knowledge or skills, changes in attitudes or values, modification of behaviors,* and *improvement in conditions.*

Generativity

One positive outcome for older adults in intergenerational programs is enhanced generativity. Generativity refers to the capacity of adults to care for family, community, and institutions, to preserve and pass on cultural traditions, and to produce products, outcomes, and ideas that will survive themselves and become a legacy for future generations.

The concept of generativity was first conceptualized by Erik Erikson, who defined it as "concern for establishing and guiding the next generation" (Erikson, 1968). He later summed up generativity with the phrase, "I am what survives me" (Erikson, Erikson, & Kivnick, 1986). Generativity has been associated with psychological well-being (Keyes & Ryff, 1998); it has been found in pilot studies to increase in older adults who participate in inter-generational programs (Bundens & Bressler, 2002; Fried et al., 2004).

Outcomes can be measured for individual older adults and youth, families, organizations, and communities.

Older adults. Outcomes for older adults might include improvements in:

- Generativity

- Life satisfaction and well-being

- Sense of connectedness to others and/or to the community

- Attitudes toward youth

- Physical health (e.g., enhanced energy, stamina, or strength)

- Willingness to support funding for public education or programs that serve children and families

- Engagement with social and physical environments (particularly among persons with dementia)

- Extent of their social networks

- Ability to speak and read English

Youth. Outcomes for youth might include improvements in:

- Sense of social responsibility

- School attendance

- School behavior (e.g., number of suspensions)

- Grades

- Attitudes toward older people

- Bonding to their school and community

- Self-esteem

- Knowledge about substance abuse

- Life skills (e.g., problem-solving, decision-making)

Evaluate Relationships

In addition to examining the impact of a program on individuals, it is also possible to measure intergenerational relationships. In an observational study of a shared-site program in New York, Hayes (2003) analyzed a variety of elder and youth behaviors, including level of participation, level of enthusiasm, smiles or grimaces during activity, demonstrations of concern for other participants, shows of physical affection (hugs, touching), signs of agitation or distress, and level of interaction with the other generation. One of the most observable changes over time for both groups was the increase in "generational closeness"—the "degree to which a participant physically approached one or more individuals of the opposite generation" during an activity (p. 122).

Families. Outcomes for families might include improvements in:

- Level of caregiver or parental stress
- Ability to access services
- Feelings of attachment to their children
- Amount of support from social networks
- Participation in their children's school activities
- Availability of free time

Organizations. Outcomes for organizations might include improvements in:

- Staff retention
- Organizational climate
- Staff/teacher morale

Communities. Outcomes for communities might include improvements in:

- Level of interaction across ages
- Level of volunteerism
- Feelings of safety
- Degree of social connectedness
- Neighborhood beautification

Quantitative and Qualitative Approaches

Both process and outcome data can be collected using either quantitative or qualitative approaches. **Quantitative** refers to something that can be measured numerically; it typically involves a large number of clients. Examples of quantitative data are the number of participants in a program, ratings on a participant satisfaction survey, and scores on a knowledge test. **Qualitative** evaluation uses narrative data and often involves a smaller number of clients. Examples of qualitative data are responses on an open-ended survey or in a focus group, field notes taken by an observer, and notes based on videotapes of intergenerational activities.

Quantitative vs. Qualitative Methods

A quantitative approach has the following advantages:

- Quantitative results have more stature. Ideally, to demonstrate that a program is effective, an evaluation can show both measurable positive changes in the problem and that the program was responsible for that change (Mindel, 2002).

- Quantitative data are often preferred by funders.

- Quantitative methods are more easily replicable.

- Quantitative data allow you to compare similar results from different populations.

- Quantitative analysis is less vulnerable to bias than qualitative analysis.

A qualitative approach has a different set of advantages:

- With open-ended formats, participants provide information that they think is important, thus allowing you to gain in-depth understanding and learn about unanticipated causes and results.

- Qualitative data can complement quantitative data by providing contextual information.

- Qualitative information, if collected in the early phases of an evaluation, can inform the creation of a more comprehensive and on-target quantitative evaluation.

PLANNING AN OVERALL EVALUATION STRATEGY

Evaluation planning should be part of your overall program plan. This will result in an evaluation that is thorough, accurate, and better integrated into your program. As you begin the planning process, it is helpful to keep these standards in mind:

- The evaluation should provide information that will be used to improve the program over time.

- The evaluation should provide information that is of interest to major stakeholders: staff, funders, participants, policymakers, etc.

- The evaluation should document the overall effectiveness of the program.

Also keep in mind the following strategies, which tend to be especially crucial when evaluating intergenerational programs:

- *Evaluate the efforts of all generations involved.* Frequently, evaluations of intergenerational programs assess only the impact of the program on the generation that receives services. When this happens, important opportunities to understand the overall context are missed. The decision to limit the focus often

stems from the primary goal of the program and from the funding source. For example, a youth agency that sponsors a mentoring program may only be looking at the impact of the mentors on the youth; it doesn't have an interest in or a mandate to evaluate the older adult mentors' point of view. But if mentors are also evaluated, the program can learn important lessons about attracting and retaining good mentors as well as how to strengthen the program overall. The program may also use its findings about the impact on older adults to attract further funding for projects related to aging.

- *Plan your evaluation early.* Evaluations are more effective when they are designed before the program starts. Early planning is especially important when evaluating intergenerational programs. With different age groups to assess and partners to involve, intergenerational evaluation can be complex. For example, you may find that you want both a specialist in aging and a specialist in child development to have a voice in your evaluation design.

- *Evaluate institutional partnerships.* Partnerships between organizations that serve different age groups are often at the core of an intergenerational program. Over the course of your program, you and your partner organization should assess how well the partnership is functioning, and then feed that information back into your ongoing program administration.

- *Involve outside evaluators.* Evaluators should be partners with programmers. They can help define program theory and develop tools that accurately measure your program's effectiveness.

Now you are ready to begin the six-step process of planning your evaluation.

Evaluation Planning at a Glance
Step 1: Decide with your partners what you hope to learn
Step 2: Explore your options for collecting data
Step 3: Decide on a research design for process evaluation
Step 4: Decide on a research design for outcome evaluation
Step 5: Develop a budget
Step 6: Develop a written evaluation plan
Step 7: Make sure that your staff is on board

Step 1: Decide with Your Partners What You Hope to Learn

Evaluations should be designed to produce useful information. Yet, not everyone's definition of utility is the same. The questions you want answered by your evaluation may be very different from those of your partners, funders, or outside researchers and policymakers. A good evaluation plan requires striking a balance between what program staff consider useful and what other interested parties want to learn.

A good place to begin mining evaluation questions is the logic model you developed to guide your program planning (see Chapter 5). Take a look at the activities you included and the results you hoped to achieve.

To assess program processes, develop questions that assess the degree to which you completed the proposed activities and how the environment and influences had an impact on the program and/or the participants.

To evaluate outcomes, develop questions that measure the degree to which you achieved your desired results. Then consider what else you want to learn. For example, you may want to take a closer look at one aspect of the program (e.g., volunteer recruitment) or find out how much it costs to implement your program.

| Situation | Input | → | Activities | → | **Desired Results** (short-term, intermediate, and long-term) |

Assumptions · Environment/Influences
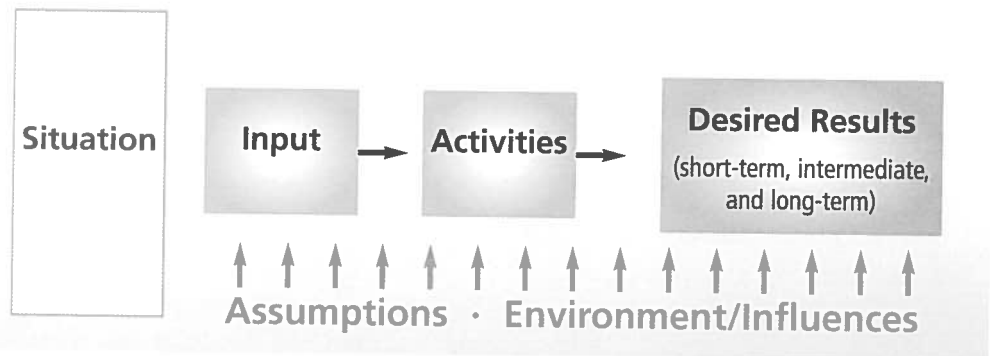
The examples that follow list some typical evaluation questions that can be applied to most programs. After brainstorming a "laundry list" of possibilities, work with your team to narrow the list to only those questions that are most important to answer.
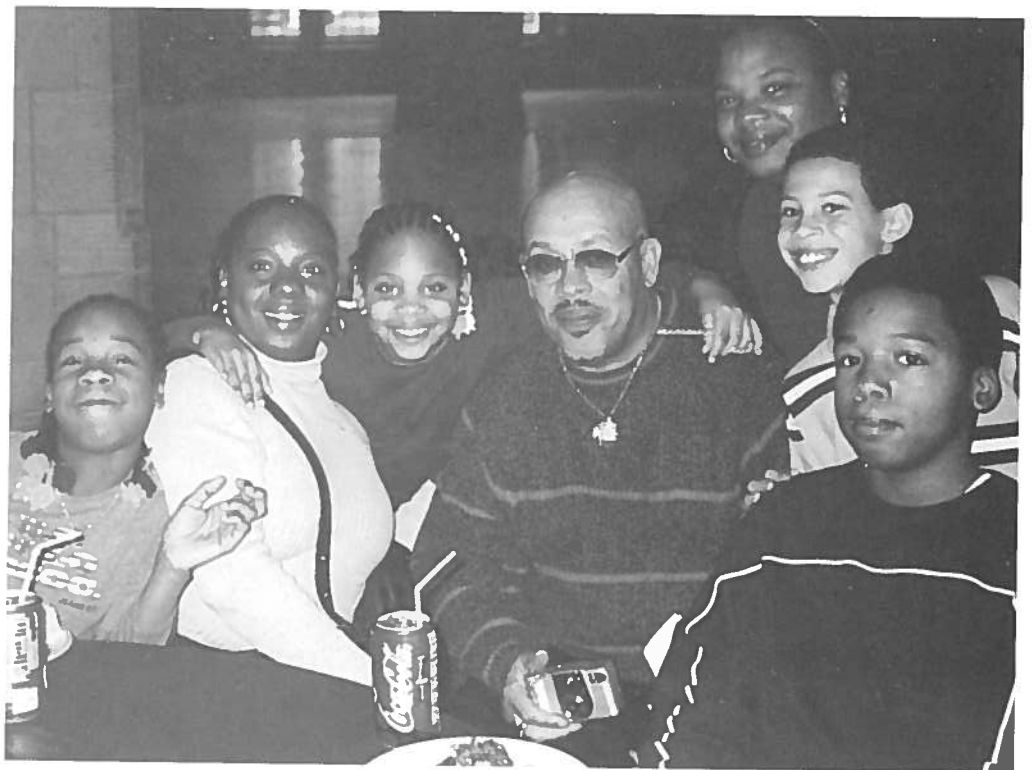
Evaluation Questions for Intergenerational Programs

PROCESS QUESTIONS

- How many children, families, and older adults are involved in the program?

- On average, how many hours of contact do older adults and youth/families have per month?

- What roles do younger and older participants have in program planning?

- Are activities implemented as planned?

- What barriers to implementation have we encountered?

- What strategies have we used to overcome these barriers?

- What do participants like about the program?

- What do participants dislike about the program?

- How long do volunteers typically stay connected to the program?

OUTCOME QUESTIONS

- To what degree do the service recipients benefit from the program in ways that are consistent with the program's goals? For example, general well-being (health, life satisfaction, self-confidence, socialization skills, generativity), academic outcomes (grades, reading/test scores, school attendance, classroom behavior, improved study skills, second language proficiency), attitudes toward other generations, and attitudes toward civic participation.

- Does program participation have unexpected benefits for younger and older participants?

- In what ways, if any, are participants negatively affected by the program?

- What impact does the program have on the participating organizations?

- What impact does the program have on the community?

QUESTIONS THAT EXPLORE THE RELATIONSHIP BETWEEN PROCESS AND OUTCOMES

- What types of activities promote the greatest level of interaction between the participants?

- Which mentors had the greatest impact on the youth participants' self-esteem?

- What kinds of families benefit most from the presence of a mentor or the provision of respite care?

During an open-ended interview, the director of nursing at a long-term care facility indicated that residents with poor appetites ate more when children visited for lunch. When this information was shared with staff, they began to routinely incorporate meals with children into their nursing care plans.

Step 2: Explore Your Options for Collecting Data

Evaluation methodology is the overall plan that incorporates one or more tools for collecting data (e.g., surveys, focus groups) and the procedures for doing so (e.g., pre- and post-testing to look at changes over time). Some methods can be done simply, in-house, such as program satisfaction surveys and reviews of records. However, to achieve objectivity, or if using multiple or more complex methods, you should use an outside evaluator who has training and experience in research methodology.

Commonly used data collection methods are described below.

Site-Developed Surveys

Programs can develop surveys that include closed-ended (e.g., multiple choice, true/false) and/or open-ended questions (e.g., "Describe what you like most and least about the program"). A survey that combines both kinds of data is most effective. Surveys can be self-administered written questionnaires or telephone/in-person interviews. Surveys should include questions that reflect changes over time and that capture the behavior, thoughts, and feelings of respondents. They should be:

- easy to interpret, using simple, straightforward questions
- culturally sensitive
- written at an appropriate reading level
- age-appropriate

Whenever possible, try to pilot your survey with a small group of people who are similar to the people you will ultimately survey (e.g., experienced volunteers, other teens). Time how long it takes to complete the survey. Interview the group together or individually about whether the questions were clear, captured their experiences, and were interesting to answer. Ask if there are any other topics that should be covered by the survey and if there is anything offensive in the survey. Incorporate this feedback into your final survey.

Interviews and Focus Groups

Individual interviews often combine closed- and open-ended questions, while focus groups involve a group discussion guided by open-ended questions. Discussions may include participants' feelings about the program and/or descriptions of their experiences and behaviors. Although both formats use pre-determined questions, they also permit evaluators to follow participants' leads and pursue areas of particular interest.

Conducting focus groups and interviews requires skill. Facilitators and interviewers must maintain objectivity while providing a supportive environment for conversation. Good facilitators are able to give all participants a voice while still keeping the group on track. To improve candor and honesty, assure group members and interviewees that their remarks will remain anonymous. It is also preferable to select an interviewer/facilitator who is not known to the group and who is not a member of the program staff.

Writing Interview Questions for Young Children

It is especially challenging to write questions that can capture the information you want from children. It is important to keep questions simple and concrete and to be animated in your presentation. The following focus group questions, written with assistance from an elementary school teacher, were effective for learning how first-graders felt about reading after participating in a literacy program with older adults:

I'm going to say three things—after I say them, you tell us which one you agree with the most [SAY WITH FEELING]:

"I DO NOT LIKE TO READ"

"I THINK READING IS JUST OKAY"

"I LOVE TO READ"

- Okay, how many of you would say: "I do not like to read"? [state number of children who give this answer]

- Now, how many of you would say: "I think reading is just okay"? [state number of children who give this answer]

- And how many of you would say: "I love to read"? [state number of children who give this answer]

- For those who said "I do not like to read," what is it about reading that you don't like?

- For those who said "I think reading is just okay," what is it about reading that is "just okay"?

- For those who said "I love to read," what is it about reading that you love?

Standardized Scales

These are tested sets of questions that focus on a single, broad concept, such as self-esteem, level of functional ability or disability, generativity, or caregiver stress. Scales become standardized when they have been tested in comparison to other scales that measure similar constructs to assure that they have validity—that is, that they measure what you want them to measure. They also have been tested for reliability, meaning that they provide consistent results when repeated under similar circumstances. If the primary goal of your program is to have an impact on a particular construct, or set of behaviors, then the results of your evaluation will be more meaningful if you incorporate standardized scales. However, doing so will also add length to your survey and may require complex data analysis. Work closely with your evaluator to make sure that the scales you select adequately measure your programmatic intervention. (The Resources section at the end of this chapter lists several sources for standardized scales.)

Records Review

As part of their ongoing operations, organizations routinely collect information about program participants and about how programs run. Summarizing and analyzing these data can help you understand what's going on with your program, and document outcomes. These are some program records that may provide useful evaluation data:

- Students' grades

- Standardized tests scores

- Intake, assessment, and reassessment information collected about program clients

- Progress notes

- Staff meeting minutes

- Financial records

- Attendance records

- Volunteers' timesheets

- Staff logs of contacts with partner organizations and program participants

Ideally, decisions about the kinds of information to track should be made when you first develop your record-keeping procedures so that forms are designed and data entry procedures are established that enable information to be collected easily, consistently, and accurately. When developing a new program, create methods for recording information about participants and the program that can easily be entered into a database. When data are regularly entered, you will be able to retrieve information for periodic reports.

Depending on the kinds of information you plan to look at, you may need to obtain consent from participants or their guardians. If you plan to review records collected by a community partner, you will need to discuss how the information will be collected and summarized, and to make sure that the project's letter of agreement specifies that the partner will provide these data.

What a Database Can Do

As part of the evaluation of national Family Friends sites, a database was created, using Access software, that enables site staff to enter data about children and their caregivers, older adult volunteers, intergenerational matches, attendance at special events, and volunteer visit reports. The database can be programmed to generate reports on demographic characteristics of program participants, the length of time between intake and matches, the frequency and length of visits, program participants' demographic information, and more. In addition, the outside research team implementing the evaluation is linking this process data to additional data collected from outcome surveys. Altogether, the researchers are able to do sophisticated data analysis to explore relationships between varied levels of program participation and outcomes for caregivers and older adult volunteers.

Participant Observation

Over the course of an intergenerational relationship, you should expect to see an increase in behaviors that reflect a growing closeness between the children and adults, such as laughing together or holding hands. Researchers often use careful observation to record these behaviors, either with checklists (quantitative) or by taking notes (qualitative). The encounters can be observed in person, or videotaped and analyzed later.

Process Log/Journal

It is important for staff members to record their perceptions related to the effectiveness of activities, the challenges they encountered, and any insights they have. Narrative history of a program's implementation can make a significant contribution to both process and outcome evaluations. Staff members' records may also help explain anomalies as they relate to program outcomes. For example, staff records showing that a mentor quit a program early would provide an important context for understanding that mentee's ultimate lack of success in the program.

Debriefing with Participants After Each Activity or Interaction

Using either a formal reflection exercise or informal conversation, staff should talk with participants about what they liked and didn't like about the activity, how well they connected with people who are a different age from themselves, and what they learned. The notes that staff keep from these debriefings contribute to knowledge about the program and can be used to improve the overall program as you proceed. This is an especially good technique when working with frail elders or very young participants who may have difficulty articulating an overall impression at the end of an ongoing program.

Step 3: Decide on a Research Design for Process Evaluation

Designing a process evaluation is less complex than designing a method for assessing outcomes. When developing a process evaluation, first ask these questions:

- What information do we need to routinely collect in order to keep track of whether the program is implemented as planned (e.g., attendance lists for special events, number of hours of service provided to participants, staff meeting minutes)?

- What do we need to do to organize this information in a way that it can be easily summarized (e.g., Are forms developed that can make it easy to tally service hours? Do we have the capacity to enter these records in a computer?)?

- Who can provide us with varied points of view about program implementation (e.g., staff, volunteers, collaborators from other organizations, referral sources)?

- What are the most effective methods of gathering information from each of these sources (e.g., staff logs, key informant interviews, focus groups)?

Answers to these questions will help you think through how to plan a process evaluation that ensures that your required record-keeping will inform your assessment and that enables you to benefit from the perceptions of key players.

When staff members leave before a program concludes, do an exit interview to record their perceptions of the history of the program, get their opinions on what works and doesn't work, and ask for recommendations for successful continuation of the program.

Step 4: Decide on a Research Design for Outcome Evaluation

When possible, you should conduct an outcome evaluation to assess if there were changes among those who were involved in your program and if the program caused those changes. Depending on the number of people participating in your program (the sample size), the resources available, and your level of expertise, you can select the appropriate research design.

Experimental Designs

As the gold standard in evaluation, classic experimental design involves randomly assigning individuals to one of two groups, one of which gets the program services (the experimental group) and one of which does not (the control group). It is not always possible to randomize, however. For example, it is neither practical nor ethical to assign students who have been recruited for and enrolled in a mentoring program to a control group where they are not matched with a mentor. Experimental designs are particularly challenging and should be implemented by professional researchers.

An alternative is a quasi-experimental design, in which an existing group (i.e., your program participants) receives a service and another group (the comparison group) does not. The comparison group should be similar in age, ethnicity, gender, and socio-economic status to those in your program (though members of the comparison group are not necessarily randomly selected, as in a control group). Sometimes other schools or senior centers with similar demographic characteristics can serve as a comparison group. In the Across Ages evaluation described earlier, a similar class at the same school served as the comparison group.

The research procedures are similar for both experimental and quasi-experimental designs. Baseline measures (e.g., life satisfaction scales, knowledge about child abuse, reading assessments) are taken before the intervention starts and then again after the intervention ends. Outcomes for both groups are compared to determine if the experimental group (those in the program) experience a positive change compared to the comparison or control group. A statistician will conduct tests of significance to determine if a change is due to your program rather than chance. Statistical significance is also strongly influenced by the number of people participating in the evaluation.

Pre-/Post-Test Comparison

In this design, data are collected from participants before and after the program and then compared. This design can measure changes over time but cannot tell whether the changes would have occurred without the program. Pre-/post-test data can be either qualitative or quantitative. Quantitative data can be compared in the aggregate (e.g., to assess changes in the group as a whole) or for individuals. The advantage of matching individual data is that you can explore whether people with different characteristics respond differently to the program. However, you will need to compare data for many individuals in order to determine trends within sub-groups (e.g., by gender or ethnicity).

Consult an evaluator and/or statistician for help in determining an appropriate sample size. If matching individuals' pre- and post-test data, you will also need procedures for identifying whose data you are looking at, gaining informed consent, and maintaining participants' confidentiality.

End-of-Program Data Collection

Frequently, evaluation design and data collection are postponed until the end of a program. In these cases, evaluators typically survey or talk to participants about their experiences after the fact. The value of this method is that it gives participants time to reflect before sharing their opinions. It also is preferable to doing no evaluation at all. The disadvantage is that no data are produced over the course of the program to assist in program improvement. You may also miss opportunities to collect information from participants and staff who have left the program partway through. Furthermore, the absence of comparison information will make it impossible for you to link observed improvements to program participation.

Step 5: Develop a Budget

Conducting an evaluation costs money, though how much money will depend on the size, scope, and rigor of your evaluation plan. Think carefully about what you want to learn from your evaluation and what you plan to do with the information you collect. Then make sure to devote the resources you need to answer your research questions. If you don't have ample funds available, consider seeking additional funding. Keep in mind that the more you invest in a well-designed evaluation, the more likely it will be to generate information that will be useful to a broader audience.

Evaluation expenses typically include evaluator salary, staff labor, participant incentives, and administrative costs.

Evaluator Salary

This is probably the most significant evaluation cost. There are several advantages to bringing in an outside evaluator or team to design and implement your evaluation. First, outside evaluators are more likely than program or agency staff to be objective about the program. Focus groups and interviews may also be more productive if facilitated by an outsider; though participants might initially feel more comfortable with a familiar staff person, they may also withhold frank comments for fear of hurting that person's feelings or compromising their own status within the program. Finally, many funders require evaluations to be conducted by someone outside the organization.

Finding a Qualified Evaluator

To find a qualified evaluator, contact a nearby college or university (particularly one that teaches social work, education, therapeutic recreation, gerontology, nursing, or public health). Graduate students or faculty members often know a lot about evaluation; depending on their experience and skills, they may be able to design your entire evaluation, collect data, design databases, and/or analyze and write reports. Other sources that may be able to direct you to individuals or organizations that provide evaluation services include your local United Way, Area Agency on Aging, or school district. When evaluating an intergenerational program, it is important that the evaluator or evaluation team has experience with or can access information about the populations—young and old, and cultural groups—that are involved in your program. Before selecting an evaluator, make sure to take a close look at candidates' curriculum vitae, review any relevant articles they have written, and contact their references.

Staff Labor

Staff input is key to ensuring that the evaluation actually assesses what the program is trying to accomplish. Inevitably, program staff will be involved in some aspect of evaluation. Designated tasks may include providing input on evaluation design to the outside researcher, writing and designing surveys, recruiting and tracking evaluation participants, conducting and transcribing interviews, entering and analyzing data, and writing reports. Make sure that staff who participate in these activities understand that the purpose of the evaluation is to assess the program, not their job performance.

Participant Incentives

One of the best ways to increase participation in evaluation activities is to offer compensation. People are much more likely to complete a survey or attend a focus group if they know they will receive cash for doing so. It is also reasonable to increase the amount of the incentive over time. For example, for completing an interview, you might offer current program participants $15 but previous participants $25 (since collecting follow-up data tends to be more challenging). If you are unable to provide cash incentives, offer gifts or gift certificates that are age- and culturally appropriate.

Administrative Costs

Don't forget to include in your budget line items for photocopying and postage. These costs can be particularly high if you plan to collect data via mailed surveys. To increase the rate of return, it is helpful to include self-addressed, stamped envelopes. You may also find it necessary to send out multiple mailings. If you are conducting focus groups, include the cost of transcribing audiotapes, which is most efficiently done by professional stenographers.

Evaluation Cost

Below, a range of evaluation methodologies are compared by cost.

LOW COST

- Count the number of participants, services, or products provided to quantify program implementation

- Describe participant demographics to show that the program reached its target population

- Assess participant satisfaction

LOW TO MODERATE COST

- Assess changes in participant knowledge, attitudes, and behavior using pre- and post-test surveys

- Assess what worked and did not work, using process evaluation tools

MODERATE TO HIGH COST

- Use a comparison or control group so that you can attribute immediate changes to the program

HIGHEST COST

- Continue tracking participants after they leave the program

Adapted from *Administration on Children, Youth and Families, n.d.*

Step 6: Develop a Written Evaluation Plan

Once you know what you want to learn, how to get the necessary information, and what it will cost you to do so, you and your evaluator can develop a written evaluation plan. As stated earlier, the most productive and effective evaluation plans are designed during program planning. An evaluation plan lets you build data collection into other program activities. It also allows you the option of collecting baseline data, which is critical for pre- and post-testing and experimental designs.

When developing your plan, consider using a combination of methods. For example, you might combine pre- and post-test participant surveys with an end-of-project focus group. This would allow you to explore any interesting survey results with focus group members.

Table 11.1 shows a sample evaluation plan for Reading Partners, the hypothetical tutoring program discussed in Chapter 5. This plan was designed to assess the degree to which Reading Partners achieved the desired results that were laid out in its logic model (see page 70).

TABLE 11.1

Evaluation Plan for *Reading Partners*

EVALUATION QUESTIONS	EVALUATION METHODS
• Did the program recruit and maintain the desired number of tutors?	• Annual review of volunteer enrollment and turnover/retention records (via a log system established at the beginning of the program)
• What obstacles to volunteer recruitment were noted? • How were they overcome? • Which recruitment strategies were most effective?	• Review of staff notes • Staff interviews • Focus group with volunteers
• Was volunteers' quality of life impacted by their volunteer experience?	• Pre- and post-test volunteer surveys, incorporating standard measures of well-being, administered at the beginning and end of school year; analysis to take into account number of years of service and program attrition • Annual focus groups conducted with randomly selected volunteers toward end of school year
• Did the project deliver the planned number of tutoring hours?	• Volunteers' logs of the number of hours they tutor each child, compiled electronically at the end of every school term
• Did reading scores of children with tutors improve?	• Anonymous, per-child analysis of changes in standardized reading test scores from start of year (or end of previous year) to end of program year (data provided by schools)
• Did children with tutors continue to read at or above grade level when they were no longer receiving tutoring?	• Standardized reading test scores for program participants two years after program's end (data provided by schools); data are then compared to children within the school or school district who had similar baseline reading scores and did not have tutors
• Did children report an increased enthusiasm for reading?	• Teacher and parent interviews and/or focus groups with children
• What is the likelihood of the project's long-term sustainability?	• Aggregated data on tutored children compared to non-tutored children • Changes in aggregate reading data compared for schools with and without tutors
• Do participating schools provide funds to sustain the program on an ongoing basis?	• Document sources of financial support

Step 7: Make Sure that Your Staff Is On Board

Staff buy-in for your evaluation is important for many reasons. As mentioned earlier, staff can help keep evaluators on track; their knowledge of what the program is both doing and trying to do is critical to the development of an effective plan. As the primary record-keepers for the organization, they also are a key source of process and outcome data. Staff are also essential for connecting evaluators with participants.

Obtaining staff buy-in can be challenging. They may perceive data collection as a burden or feel threatened by having someone looking closely at the work they do. They may be concerned that poor evaluation results will reflect badly on them. To engage staff in evaluation, consider doing the following:

- Remind them that the purpose of the evaluation is to determine how best to serve clients

- Include program evaluation responsibilities in their job descriptions

- Explain that evaluation is a funding requirement

- Conduct a frank group discussion before the evaluation begins, possibly facilitated by an outside evaluator or facilitator, about their concerns or fears related to program evaluation

- Acknowledge that evaluation activities are time-consuming

- Emphasize the distinction between "program" and "employee" evaluation

READY TO EVALUATE

Once your staff members are on board, you are ready to implement your plan by gathering and analyzing data on your program's processes and outcomes. Planning your evaluation may take a few months, but data collection and analysis often take much longer. Data collection requires consistency and persistence. Analysis requires open-mindedness and a thorough review of the data. When you are done, you will have gained new insights into your program's strengths and weaknesses. You can also leverage any positive results to maintain current support or seek new sources of funding.

Data Collection

Program participants' input into your evaluation is essential to really understanding your program. Without their full cooperation, your access to good data will be limited. The best thing that can happen—and it often does—is for people to walk away from a focus group, interview, or survey saying that they enjoyed themselves.

To obtain participants' buy-in, remember the following:

- Be enthusiastic when you ask. People of all ages like to share their opinions and talk about themselves.

- Explain the purpose of the evaluation—let participants know that their ideas will be taken seriously when you try to understand what works and doesn't work in the program. If the evaluation asks personal questions, make sure that there is a reason for those questions and that the reason can be explained.

- Describe how important evaluation is to continued funding for this type of program.

- Describe how and with whom information will be shared.

- Be explicit in describing confidentiality procedures.

- Assure people that all opinions are welcome and that no one will be criticized for holding any opinion.

- If using an open-ended format, ask follow-up questions that are relevant and demonstrate that you are really listening and interested.

- Do not ask for Social Security numbers as identifiers for a survey; you will lose participants by doing so.

- Provide food and beverages and, if possible, cash or gift certificate incentives.

Here are some other practical strategies to facilitate data-gathering:

- Make sure to either have one person do the interviews or have all interviewers go through training to ensure that the questions are asked in a consistent manner.

- When using a pre-/post-test methodology, do the pre-tests as early as possible, preferably before the program begins.

- Think about the timing of post-tests. Consider how long it should take to see an impact, then balance that estimate with the length of time that people tend to stay in the program. For example, the evaluation of a respite program did post-tests regarding caregiver stress after six months, which gave the college students time to form strong bonds with families. However, so many of the frail elder clients entered nursing homes or died prior to the six-month evaluation that post-tests couldn't be conducted with some of the families who had received the most help. The post-test schedule was changed to a three-month follow-up.

- Schedule surveys to be completed during established group meetings. It is often difficult to get participants to take their own time to complete a survey or sit for an interview. By setting aside time during a special event or training, you are most likely to get people to participate.

- Anticipate making several attempts to contact participants when giving a self-administered questionnaire in non-group settings. Telephone them before the survey is sent. Call them back and send additional copies if they don't respond the first time.

- Place a reference number on surveys so that you know who has and has not completed them.

- Have staff and volunteers write up logs and progress notes as close to the day of the activity as possible so that their memories of events are fresh.

- Schedule focus group meetings at times and locations that are convenient for the participants, rather than for staff. One of the hardest things about focus groups is getting people to show up.

Cultural Awareness and Sensitivity

Such factors as race, religion, age, gender, sexual orientation, country of origin, and primary language can all affect how individuals respond to evaluation questions and procedures. For example, cultural factors may influence people's comfort answering certain types of questions. Some standardized scales may be ineffective when used with participants for whom English is a second language. Religious observance may preclude holding focus groups on a particular day of the week.

It is important to learn all you can about the culture and customs of your program participants when designing your evaluation. If most of your participants share particular characteristics (e.g., ethnicity, gender), try to use interviewers or facilitators who share these characteristics (e.g., have a young woman interview the girls and a young man interview the boys).

It is also important to consider cultural factors when conducting your data analysis—particularly when looking at qualitative data. For example, slang expressions often differ across generations and ethnicities, and their meaning may be ambiguous to someone who is not familiar with a respondent's culture. When analyzing narrative data that include slang, make sure to review your results with someone who is knowledgeable of the meanings that your particular respondents give their words.

Analysis

Now that you have your data, what do you do with them? Data, whether they are quantitative or qualitative, need to be objectively analyzed, which can be a complex task. Here are some practical strategies for analyzing your evaluation data:

- Include data analysis in your evaluation plan. Make sure that you have the capacity to properly analyze the data you will collect.

- Analyze evaluation data periodically while the program is running, so that the evaluation is a source of useful feedback to program staff.

- Enlist the help of a professional researcher to analyze any data that involve complex scales or subscales. It is important that the person who completes the analysis does not have a vested interest in the results. This objectivity will provide you with more reliable results, and any positive results will be more powerful.

- Include analysis in your timeline. Analyzing qualitative data can be very time-consuming. It involves going through a transcript and assigning comments codes that represent particular themes. The analyst then looks for patterns and trends and selects representative quotes. While this type of analysis can yield very valuable information, it is also imprecise and can be subjective. The analyst needs to be familiar with the population of respondents and with the issues being addressed, though he or she should not be a member of the program staff.

Protection of Human Subjects

"Protection of human subjects" refers to the steps that evaluators and researchers must take to minimize the chance that study participation will cause participants harm. For evaluations of social service programs, the most likely risks are that a study participant may feel uncomfortable when asked personal questions or that confidentiality will be violated should an individual's identity be linked to personal information. Individuals may also feel intimidated by having to complete a lengthy questionnaire. To minimize the potential for harm, it is necessary to address these key issues:

- VOLUNTARINESS. Make sure that individuals understand that participation in the evaluation is voluntary and that they will still be able to participate in program activities even if they decline to participate in the evaluation. Evaluation participants should also be reminded that they can skip any question they don't want to answer and that they are free to discontinue participation at any time.

- CONFIDENTIALITY. Study participants may not want the information they provide as part of the evaluation to be shared with others without their permission. If you promise study participants that the information you collect will remain confidential, it means that only the evaluation staff will have access to the data.

- INFORMED CONSENT. It is important that everyone participating in your evaluation understands the purpose of the evaluation, what participation entails, and any associated risks or benefits. These issues should be discussed, as well as documented on a written consent form. Individuals (or their guardians) who agree to participate in the evaluation should sign this form.

Federal regulations require that procedures for certain evaluations be reviewed and approved by an Institutional Review Board (IRB). IRBs are formal committees that review procedures to assure protection of human subjects. IRBs are located at most colleges and universities and many large human service and research organizations. Evaluations that are limited to the review of anonymous data (e.g., educational tests, participant satisfaction surveys) or program records are exempt from IRB review and do not require signed consent. Evaluations involving the collection of data that can be linked to individual participants must be reviewed by an IRB. To find out if your plan requires IRB approval, contact the research review or IRB office of a nearby college or university.

Sharing the Information

People are often skeptical of research and evaluation, believing that researchers either fabricate results or shape their findings to tell the story they want to tell. It is, in fact, a significant challenge to avoid bias when reporting evaluation results. There are pressures on evaluators to put a positive spin on the data, and decisions about what to emphasize in an evaluation report are often left to these experts. Not only is it the job of the evaluator to be balanced in these decisions, it is also the obligation of program directors and staff to be open to the lessons learned—negative or positive—from the evaluation.

Develop an outline for organizing and presenting your evaluation findings. You will need a report that clearly describes the effectiveness of your program in order to maintain current support, garner new support, and apply for additional funding. Try to be concise, avoid jargon, and present a balanced set of findings. Include powerful anecdotes and quotations in your report that convey the impact of the program on participants.

Evaluation Report Outline

Cover page. The title or subtitle should be specific, such as, "Evaluation of Reading Partners Intergenerational Program." List the evaluators' names, the dates of the evaluation, and the date of the report.

Executive summary. This brief (two- to three-page) overview of the evaluation should outline major findings and recommendations. Since many people only read the executive summary, make sure that it is as complete and clear as possible.

Background information about the program. Write this section assuming that readers know nothing about your program. Take time to describe program goals, demographic characteristics of participants, project activities, organizational partners and their respective roles, and other essential program elements.

Description of the evaluation. This section explains why you conducted the evaluation and what you hoped to learn from it. You should also summarize the evaluation methodology and its advantages and limitations.

Results of the evaluation. This section should include a summary of the data collected and analyzed during the evaluation (using charts, tables, and graphs, as appropriate, so that the data are easily understood), interview excerpts, testimonials from participants and clients, questionnaire results, test scores, and additional anecdotal evidence.

Discussion of results. Assign meaning to your results and place them in the context of your overall initiative. What do your results say about the strengths and weaknesses of the program and the strengths and weaknesses of the evaluation?

Implications for the program. Making recommendations based on the evaluation results may be the most important part of the report. A challenge of writing recommendations is maintaining objectivity. Take your time and think through the messages of the evaluation and how they shape your view of the program.

Adapted from KU Work Group on Health Promotion and Community Development (2002).

In Closing

Sometimes, people confuse the terms "evaluation" and "research". Generally, the purpose of evaluation is to understand the overall value of a program, whereas the purpose of research is to contribute knowledge about a phenomenon. (Kuehne, 1998-1999). But there is overlap between evaluation and research, particularly when scientifically oriented methods are used to learn about the impact of programs on participants. For the most part, this chapter has been about conducting evaluations. In many cases, intergenerational programs are small and using rigorous research methods would be unrealistic. However, the more that you incorporate "scientific" techniques into your evaluation - such as grounding the evaluation in theory and using pre- and post-tests that incorporate existing research scales – the stronger its impact.

In any case, whether you do a small-scale evaluation or a sophisticated research study, share your results with others! It may take tenacity and even courage for program evaluators and staff to advocate that stakeholders pay attention to evaluation results and use those results to continually improve programs. Yet, only by doing so can you develop high-quality programs that meet the needs of participants, volunteers, and the greater community, and that can serve as models for other intergenerational ventures.

IN THE **CD-ROM Toolbox**

- **Glossary of basic evaluation terms**
- **Sample Evaluation and Research Surveys, Forms, and Questionnaires**
- **Four Theories for Research and Evaluation by Valerie Kuehne, Ph.D. and Matt Kaplan, Ph.D.**
- **Links to Chapter 11 Resources**

RESOURCES

Assessing Older Persons: Measures, Meaning and Practical Applications by Robert Kane, Rosalie Kane, and Marilyn Eells (Oxford University Press, 2000) is a thorough literature review of standardized psycho-social and health scales for use with older adults. It also presents the content of many scales, along with instructions for scoring them.

Intergenerational Programs: Understanding What We Have Created, edited by Valerie Kuehne (The Haworth Press, 1999), presents evaluation methodologies and results for a variety of intergenerational programs. Two chapters (one by Heidi Angersbach and Stacy Jones Foster, and one by Sally Newman, Gregory Morris, and Heidi Streetman) provide resources for observation of intergenerational interaction.

Measuring Violence-Related Attitudes, Beliefs, and Behaviors Among Youths: A Compendium of Assessment Tools, published by the National Center for Injury Prevention and Control, provides a variety of standardized scales, along with information about scoring and analysis. It is available online at www.cdc.gov/ncipc/pub-res/measure.htm.

Planning, Implementing, and Evaluating Health Promotion Programs (Fourth edition) by James McKenzie, Brad Neiger, and Jan Smeltzer (Benjamin Cummings/ Pearson, 2004) provides all of the background and application information needed to plan, implement, and evaluate health promotion programs in a variety of settings. Each chapter includes objectives, a list of key terms, a chapter summary, review questions, and activities. In addition, many of the key concepts are further explained, with information presented in figures, tables, and the appendices.

The Web site of *Project Star,* a Corporation for National and Community Service-sponsored technical assistance provider in evaluation, offers a variety of helpful evaluation resources: www.projectstar.org.

The Journal of Intergenerational Relationships, founded in 2003 and published by the Hayworth Press, is a peer-reviewed journal with articles on intergenerational programs, policy, and research. The journal frequently features articles that provide an international perspective on cross-age programs and relationships. To see tables of contents, order articles, and receive subscription information, visit www.haworthpress.com/store/product.asp?sku=J194.

Facts on Aging Quiz. Breytspraak, Kendall, and Halpert, at the Center on Aging Studies at the University of Missouri-Kansas City, have updated the classic Palmore Facts on Aging Quiz to include 50 questions. This can be used as a pre- and post-test to see if program participants increase their understanding of aging over the course of your intergenerational program. The quiz and answers are at http://iml.umkc.edu/cas/AgingFactsQuiz.htm.

Measuring the Quality of Mentor-Youth Relationships: a tool for mentoring programs. 2002. Written by P/PV Public/Private Ventures, this online book has a Youth Survey that is easy to administer and score. Published by Northwest Regional Educational Library http://www.nwrel.org/mentoring/pdf/packeight.pdf

The Washington Service Corps' Reading Corps has extensive program evaluation tools with instructions at its Web Site, http://www.wa.gov/esd/wsc/enrollmentforms.htm#wrc%20et.

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Chapter 12

Funding and Sustaining Your Program

Don't waste your time wishing there were more sources to fund intergenerational work—create them! You can attach the intergenerational concept to almost any issue or opportunity. Great examples include combating literacy, strengthening homeland security, mentoring children of prisoners, fighting childhood obesity, and caring for the environment.

—Donna Butts, Executive Director,
Generations United

Throughout the world, practitioners work hard to run exciting and creative intergenerational programs that benefit their communities. Alas, the inherent benefits of those programs are rarely enough to keep them sustained over time. There is enormous competition for public and private funds and for public attention to human service programs.

Whether you are starting a new program or have been running one for a while, you need a plan to win the funding and the public support that ensure long-term success. This chapter discusses strategies for funding and maintaining intergenerational programs, with attention to program adaptation and public relations.

There are many resources available to help you learn even more about the complex topics of fundraising and program sustainability, a sample of which are listed in the Resources section at the end of this chapter.

FIVE KEYS TO SUCCESSFUL FUNDRAISING

Whether you are looking for seed money to begin a small pilot project or steady funding sources for maintaining and growing a successful large-scale initiative, it is important to understand the five keys to successful fundraising: creativity, networking, preparation, persuasiveness, and persistence.

Creativity

It's the rare funder who includes "intergenerational programs" as an explicit priority. So it's up to you to show funders how intergenerational strategies can be used to address the priorities that they do hold dear. In some instances, this will require thinking creatively about how youth and/or adults can be included in the equation.

For example, perhaps your state or city's Department of Human Services has issued an RFP (Request for Proposals) for a program to prevent child abuse and neglect. This funder might not be thinking "intergenerational" until you propose recruiting older adults to provide support to vulnerable parents, role-model effective parenting skills, and supplement the services of case managers. By infusing intergenerational strategies into programs or services that address a wide variety of issues (e.g., teen pregnancy, drug prevention, and community-based long-term care), you can make your proposal stand out from other applications.

In other situations, you will need to consider how an existing program could be "marketed" to a variety of funders with different priorities. Look at the goals and outcomes of your program and think about all the funding sources that might be interested.

Consider Project SHINE, which recruits and trains college students to work with older immigrants and refugees seeking U.S. citizenship. With its emphasis on service-learning, adult education, and health literacy, SHINE has been able to attract funding from the Corporation for National Service, the Department of Education, and the MetLife Foundation. If marketed correctly, programs like SHINE could appeal to funders with interests in minority health, refugee resettlement, teacher preparation, aging, and/or university-community partnerships.

Networking

Fundraising is about building relationships—with professionals from your own and other fields as well as with funders. Strategic partnering can increase your agency's capacity to provide services, extend the reach of these services, and save money—all of which makes you more attractive to potential funders. If you do not have expertise in a specific area, become a sub-contractor with an organization that has a proven track record in this arena. For instance, an RSVP volunteer clearinghouse could coordinate a small intergenerational mentoring program as part of a large youth development grant being submitted by a well-established Boys and Girls Club. Looking beyond your traditional networks will spur creativity, introduce you to alternative funding sources, and open additional doors. You can partner locally, regionally, or nationally, depending on the scope of the funding opportunity.

Building relationships with funders is also critical. If possible, try to meet with a program officer at a funding agency before you submit your grant. If your proposal is approved, maintain ongoing communication with your program officer and invite him or her to special events. If a funder becomes invested in your organization, that funder might help you raise additional money by introducing you to other funders, holding a fundraising breakfast for your organization, or inviting you to present at a regional grantmakers forum.

Preparation

Fundraising takes time and resources. For each proposal an organization ultimately submits and wins, there are dozens it has researched, developed, and lost. If you think that your organization will be involved in substantial and ongoing fundraising, consider hiring a development director or consultant whose sole job is to raise money. If you can't afford a fundraiser, build fundraising into staff members' job descriptions and make sure to provide them with the time they need to do this effectively. Consider developing an annual fundraising plan to guide your efforts and help you target those activities that have the greatest likelihood of success. If you are applying for a grant, take the time to carefully review the guidelines to make sure that your organization or program is a good fit and meets the basic criteria.

Persuasiveness

A good fundraiser is an effective marketer: To obtain support, you must "sell" your program or idea. When communicating with potential supporters, be earnest and enthusiastic, and provide clear and concise information about why your program works. Emphasize the unique benefits of intergenerational programs (e.g., they are cost-effective, they serve multiple generations). If you are looking for funds to sustain or grow an existing project, consider developing a marketing video that showcases the project, or host site visits during which older and younger participants can share their stories with potential funders.

Persistence

Effective fundraisers don't give up and don't take rejection personally. If you submit a proposal that is not approved, call the program officer and find out why—then use this feedback to strengthen your future development efforts. Some program officers will work with you to improve your proposal if they think the idea is good and fits within their priority areas.

SOURCES OF REVENUE

The more varied your sources of support, the greater your chances of obtaining continued funding for your program, over time. Dependence on just one funding stream can cause problems, especially if the economy shifts or funder priorities change. Six primary sources of revenue—individual donations, corporate or group donations, fee for service, special events, in-kind support, and grants—are presented below. Review them all, then focus on those that seem most appropriate for your organization or program.

Individual Donations

In 2002, more than three-quarters of the charitable contributions made in the United States were from individuals (AAFRC Trust for Philanthropy, 2003). When soliciting donations from individuals, keep the following in mind:

- *People give because they feel connected to a program or idea.* At the top of your list of prospective donors should be people with whom you already have relationships, such as current and prior service recipients and volunteers, and colleagues. These people, their friends, and their relatives are most likely to contribute to your program. People may also feel connected to your program for other reasons: They may believe strongly in the program's mission, have confidence in its leadership or staff, or simply be a friend of the person doing the fundraising.

- *Relationships need to be cultivated.* When soliciting donations, make sure to not only tap into existing connections, but to foster new ones as well. A helpful motto for attracting contributions is, "Involve people, and their dollars will follow." Spend time cultivating relationships with people and organizations outside your immediate circle—people who share your values and interests and who can either provide direct support or connect you to others who can. Make sure that potential donors have a clear sense of who you are and what your program does before you ask for a donation.

- *People want to know how their money will be used.* When soliciting donations, reiterate the value of the project and make sure to let the potential donor know how the money will be spent.

- *The best appeal is a personal appeal.* If your potential donors are Baby Boomers or retirees, frame the issue in terms they can identify with, such as "productive aging" or "caregiver support."

- *There's more than one way to solicit a donation.* Try seeking donations in a variety of ways: in person; by letter, telephone, or e-mail; at a special event; or through secured Internet donations. Some organizations find it helpful to coordinate an annual appeal to program participants and their families. Others reach donors by becoming part of the United Way's Donor Option program. Encourage donors to explore whether their employers have a donor-matching program.

- *People like feeling appreciated.* Make sure to tend to your donor relationships over time. Thank donors formally and recognize their contributions publicly. Stay in touch and acknowledge special occasions (e.g., by sending personalized holiday cards). In addition, keep donors informed about program developments and progress through regular e-mail updates, newsletters, and annual reports and by inviting them to special events (Savino, 2002).

◉ Internet Fundraising

While not yet a significant source of revenue for nonprofits, the Internet holds great promise for the future. However, keep in mind that people who use the Internet—particularly for financial transactions—tend to be younger, so programs targeting older donors may have a harder time soliciting donations in this way. For information on soliciting donations online, visit www.ePhilanthropyFoundation.org.

Corporate or Group Donations

In 2002, corporations provided approximately 5 percent of the country's charitable contributions. When soliciting donations from this group, keep in mind that corporations are more likely to support local projects that are aligned with their corporate priorities. The Verizon Foundation, for example, is particularly interested in how technology can be used to address such issues as work force development, literacy, and domestic violence. Also, many corporations will only accept applications brought to them by their employees, so if you know someone who works for a corporation that does charitable giving, see how that person can help you. Most corporations describe their giving policies and provide grant guidelines and application forms on their Web sites.

Many corporations have donation programs for the materials they manufacture. For example, Microsoft Corporation donates computers and software to nonprofits and schools, and Mattel donates toys to nonprofit agencies that serve children in need. Make sure to publicly credit the businesses and organizations that make these donations, however large or small!

Giving by Corporate Foundations

- *MetLife Foundation* has funded a variety of projects that promote health, diversity, and civic engagement. The foundation has provided funding to develop an intergenerational, performance-based health promotion curriculum for older adults, a health literacy curriculum for older immigrants, and an intergenerational photography contest.

- *The Verizon Foundation* has provided grants to programs in which teens teach computer skills to older adults, as well as to organizations that utilize technology to build the capacity of nonprofits to develop intergenerational programs.

- *The Hasbro Children's Foundation* has supported programs in which older adults provide tutoring services to elementary school children and help children with special needs transition into kindergarten.

- *HCR Manor Care Foundation* has funded programs in which college students provide respite to frail elders, and students of different ages form sustained friendly visiting relationships with older adults in assisted living facilities.

Local businesses, professional associations, civic groups, and faith-based service groups also donate to service programs. Find out if any of these potential donors might be willing to adopt your program, make a special donation, sponsor an event, or encourage members to volunteer. Apply the same principles you would use to cultivate relationships with individuals: Tell people how their money will be used, and appeal to the issues the funder values.

Fee for Service or Income-Generating Activities

In some situations, it is appropriate to charge consumers for services. For example, caregivers pay college students participating in the Time Out program for the respite services they provide. They also pay a nominal, one-time enrollment fee that helps to cover the program's administrative costs. If your program provides services to an organization, such as after-school tutoring, it may be reasonable to ask that organization to cover some or all associated costs. If your agency offers workshops, consider charging registration fees. Keep in mind, however, that for many intergenerational programs, especially those serving persons with lower incomes, charging for services may not be an option.

It is also possible to generate revenue from manuals, videos, and other publications developed by your program. To maximize the profitability of publication sales, hire a marketing professional to design and implement a sales campaign.

An Intergenerational Harvest

An example of a particularly innovative income-generating strategy comes from ONE Generation in California. This shared site runs a farmer's market that involves older farmers from the area and students in need of community service hours. The farmers and ONE earn income, and the public learns about services provided at the shared site.

Special Events

Many organizations raise great sums of money by hosting annual signature events, often sponsored and/or underwritten by large donor groups or corporations. When well-run, these events can help raise an organization's visibility and credibility, thus generating more support over time. However, these events can also be extremely labor-intensive, and pull staff away from their regular work assignments. They are also expensive to run and don't always yield large profits. Creating a committee of individuals who are well-connected to the corporate sector or high-income populations is important if you decide to host a special event.

Come to the Cabaret

If you hold a special event, try to make it really special. My Second Home, an adult day program in Mt. Kisco, New York, held a Cabaret night. A committee of 15 volunteers provided a contact list for invitations and donations. Donations included entertainment and catering services. The committee helped with set-up, administrative tasks, and clean-up. My Second Home raised $15,000 with this event. Attendees described it as fun, different, and festive.

In-Kind Support

Often, an intergenerational program can reduce its budget and increase its resources by attracting in-kind donations—goods and services provided by individuals, businesses, or groups. Below are some examples of the types of in-kind support typically offered:

- Local printing companies often print program materials—such as a monthly newsletter—for free or at a reduced cost.

- Gardening clubs and horticultural societies often donate gardening supplies and provide expertise to intergenerational gardening projects.

- Art supply stores can provide discounted or free paint, canvases, and brushes for painting projects.

- Grocers and caterers often donate refreshments for special events.

- Marketing firms frequently do pro bono work for nonprofit organizations.

Grants

Among potential revenue sources, grants are perhaps the category that program staff are the most interested in learning about. Grants typically come from one of two sources: foundations or government agencies. Foundations tend to be more flexible in their requirements and more receptive to innovative and creative solutions to the social issues that interest them. Government agencies tend to be more specific about what they are looking for and how they want their needs met.

Grants can be hard to get. Federal grants and contracts, in particular, can be very competitive and challenging to write—so ease into the process. Organizations that receive substantial federal grants and contracts tend to do so by building a record over time. Start by applying for small grants and/or by partnering with an organization that has a strong track record. Eventually, your capacity to win large grants on your own will increase.

Favorable Funding Trends

Getting funding may be tough, but many of today's funding trends align themselves quite nicely with intergenerational program ideas. Take advantage of the match! Consider these promising trends:

- **Promotion of service-learning in school districts, colleges, and universities**. Service-learning can be a highly effective vehicle for connecting students and older adults. To maximize your funding possibilities, design your project so that it reflects best practices within the service-learning field.

- **Involvement of faith-based communities in the delivery of social services.** Perhaps you work for a youth service organization that wants to establish an intergenerational mentoring program to help decrease truancy. Consider partnering with a faith-based organization to help with mentor recruitment. The partnership may be attractive to a variety of funders and open up doors that would have otherwise been closed.

- **Successful aging and civic engagement.** Research on successful aging indicates that involvement in productive activities contributes to longevity (Rowe & Kahn, 1998). Consider marketing meaningful intergenerational service opportunities to Baby Boomers and retirees as part of an overall strategy for improving the health and well-being of this population in your community.

Applying for Grants

In order to win a grant, you first need to find out which funders are out there, and, among those, which are the best fit for your project.

Identifying Potential Funders

Depending on the type and scope of your program, there may be a multitude of potential funding sources. Where do you begin? Think local. Both foundations and government agencies are more likely to fund activities that directly benefit their own communities and states. However, if you have a particularly innovative idea or are partnering with an organization that has a strong national reputation in a specific field, then it is worth approaching national foundations or federal agencies.

Foundations

Foundations are in the business of giving money, and there are a lot of them out there looking to do so. However, foundations are fairly selective regarding who they will give to. Before applying for funding, look through a foundation's annual report to see what types of organizations and programs it has funded in the past, its areas of interests, and average grant awards. Keep in mind that, in the world of foundations, it also really helps to have personal contacts among foundation staff and board members. If you don't know someone personally, see if any of your friends or colleagues have foundation contacts.

Foundations fall into one of three categories: private, community, and family.

- Private foundations (sometimes called independent) are usually established around specific areas of interest. They can be either local or national.

- Community foundations pool the resources of many donors to support specific causes. They are an ideal source of funding for local programs that are designed to improve the quality of life for youth, older adults, and families in your community.

- Family foundations tend to focus on specific issues, such as health, the arts, or religious activities—activities that "support and perpetuate the founder's core values" (IFF Advisors, LLC, 2003). Family foundations usually have a geographic focus as well.

Check the Foundation Center (www.foundationcenter.org) to identify potential funding sources and then determine which ones are most appropriate for your program. Additional Web sites and publications to help you identify funders are listed in the Resources section at the end of this chapter.

Foundations that Have Supported Intergenerational Programs

National foundations include:

- Annie E. Casey Foundation
- Archstone Foundation
- The Atlantic Philanthropies
- Florence V. Burden Foundation
- Mott Foundation
- Retirement Research Foundation
- Robert Wood Johnson Foundation

Community foundations include:

- Arizona Community Foundation
- Cleveland Foundation
- Chicago Community Trust
- Westchester Community Foundation
- Southwest Minnesota Foundation

Family foundations include:

- Helen Andrus Benedict Foundation
- Helen Bader Foundation
- The Barker Welfare Foundation
- H.W. Durham Foundation
- May and Samuel Rudin Family Foundation
- HRC Foundation

Government Sources

There are many city, state, and federal agencies that could support your program. Review the priorities identified by these agencies to see if the goals and outcomes of your program fit. Government agencies publicize the availability of grant funds through RFPs. RFPs typically provide general project guidelines but require the applicant to submit a detailed project proposal and work plan. If funded, you will be expected to complete the proposed work and submit reports on a specified schedule. Before applying for government funding, make sure that your program has the fiscal structure to manage the grant and can comply with strict reporting requirements.

Table 12.1 lists some of the local, state, and federal agencies that are likely to fund intergenerational programs, and the types of programs they might support.

TABLE 12.1

Potential Funding Sources at the Local, State, and Federal Levels

LOCAL (CITY OR COUNTY) AGENCIES*	PROGRAM IDEAS
Department of Human Services	Older adults supporting vulnerable families; kinship care
School District	Intergenerational tutoring programs; mentors in after-school programs
Housing Authority	Youth development; adult literacy
Area Agency on Aging	Family caregiving; programs involving senior centers; youth supporting homebound elders
County Youth Bureau	Intergenerational mentoring and/or community service
Health Department	Intergenerational health education; older adults mentoring pregnant teens

STATE AGENCIES *	PROGRAM IDEAS
Aging	Initiatives to promote civic engagement of older adults and/or youth supporting frail elders
Arts and Humanities	Oral history and arts projects
Child Day Care	Training older adults as staff or volunteers in child care centers; shared sites
Crime and Delinquency	Intergenerational community service teams
Drug Prevention	Older adults mentoring youth
Education	Intergenerational service-learning, tutoring, and character education programs
Environment	Intergenerational environmental teams
Health	Respite care across the life span; physical activity programs for all ages
Refugee Resettlement	College students helping older refugees access health care
Welfare Department	Older adults mentoring TANF (Temporary Assistance for Needy Families) recipients

FEDERAL AGENCIES	PROGRAM IDEAS
Department of Health and Human Services:	
Administration on Aging	Older adults supporting families with special needs
Administration for Children and Families	Older mentors working with families at risk of child abuse and neglect
Corporation for National and Community Service	Senior Corps agencies partnering with schools for service-learning or tutoring/mentoring programs
Substance Abuse and Mental Health Services Administration	Older mentors involved in drug prevention programs
Office of Population Affairs	Older adults supporting pregnant teens or mentoring youth to prevent pregnancy
Department of Education	Older adults involved in Safe and Drug-Free Schools programs; students helping to improve literacy skills in older adults; family literacy for kinship caregivers
Department of Justice	Older adults supporting young offenders

The exact names of departments vary by state and municipality. Read through your state's official Web site for additional ideas.

Deciding Whether to Apply

As you've by now realized, one can use intergenerational approaches to address all types of community needs and issues. This could mean a lot of proposal writing for you and your staff—which is why it is important to be selective. Before responding to an RFP, make sure that going through the development process will be worth your while. Ask yourself the following questions:

Does your organization meet the eligibility criteria?

Is the proposed project consistent with your organization's mission?

Do you have the capacity to conduct the project if it is funded?

Can you meet all matching fund requirements?

Do you have the buy-in of staff (both top administrators and line staff)?

Do you have the expertise to develop and run the project, including knowledge of the pertinent issues for all age groups that are involved?

Do you have community partners who are fully committed and qualified?

Do you have the staff time and other resources needed to prepare the application?

If you answer "yes" to all or most of these questions, then go for it! But if you answer "no" to the majority of these questions, you may want to re-evaluate whether you should apply.

Writing a Winning Proposal

Entire books are written on how to write effective proposals. Pick up a few and leaf through them—you will no doubt pick up more than one interesting "lesson learned" that will strengthen your next grant application. Here are some tips that other intergenerational programs have found helpful when applying for funding:

- *Focus on the "win-win" nature of intergenerational programs.* The most attractive and exciting aspect of an intergenerational project is that all participants—young and old—benefit.

- *Include clear, measurable outcomes that lead to sustainable programs.* Funders are particularly interested in sustainability. Describe both short- and long-term outcomes, and include strategies for leveraging grant dollars in order to obtain future funds from other sources.

- *Follow directions.* Carefully read through the entire application and follow instructions to the letter! Failure to comply with even minor directions, such as margin width and type size, could cost you your grant.

- *Start early, and delegate as needed.* Writing and assembling a grant proposal always takes longer than you expect. Depending on the level of difficulty of the proposal, having a team work on the different pieces may be more efficient than trying to do it all yourself.

- *Clarify roles and responsibilities*. Because most intergenerational programs involve collaboration between two or more organizations, bring partners on board right way. For each organization, you will need to define roles (for both writing the proposal and their later involvement in the project) and clarify financial arrangements.

- *Keep standard items handy*, such as your organization's tax-exempt letter, board member roster, list of past and current funders, staff bios, and description of organizational capacity and/or history.

- *Don't be generic*. Frame the project in terms of the funder's priorities. Write a clear and well-documented statement of the problem that the project will address.

- *Do your homework*. Know about other organizations that address the issue. Provide background information on similar programs that have been effective.

- *Develop a clear and reasonable budget*. Make sure that you will have the money to deliver on your promises. Read the instructions to be sure that you know what expenses are allowed.

- *Ask for feedback if your proposal is not selected for funding*. Incorporate the funder's suggestions into your re-application.

Intergenerational approaches to meeting critical community needs can be very appealing to a wide variety of funders. However, it is up to grant-seekers to educate the funding community about the benefits of connecting generations and sharing resources. This often takes time, but the investment will be worth the effort.

Sustaining Your Program

When programs are successful, the community wants them to continue and grow. **Sustainability** is the continuation of a program beyond its initial planned period; while it may be adapted, it still must fit within the mission(s) of the involved organization(s). **Institutionalization** is a longer-term, more ambitious goal than sustainability. When a program is institutionalized, it is accepted as integral to a community or organization.

A lot more than continual financial support is necessary to ensure program sustainability. Below are some other important steps you can take to keep your program going.

Nurture Institutional Partnerships

Effective collaboration is frequently the foundation of intergenerational programs. Partnerships between organizations that serve different generations should be continually nurtured. Additional collaborators may include arts and cultural institutions, local businesses, and faith-based organizations. With some intergenerational projects, it is in fact the collaboration, rather than the program, that should be sustained. For example, a school and a nursing home may collaborate for years, bringing children and residents together for activities that vary for each new group.

Efforts to sustain a program should begin early enough to be productive, but late enough to be informed by a complete understanding of the program's effectiveness, strengths, and weaknesses.

Be Flexible

Take a critical look at how your program is working. What are its strengths and weaknesses? What changes would improve its effectiveness? Sometimes, rigid loyalty to an original model can undermine a program's ultimate success. Minor changes in how a program is structured, implemented, or even marketed can produce major benefits—including attracting new funders.

A New Mentoring Model

A mentoring program for inner-city boys was having a hard time recruiting older men as volunteers. Though the program offered a stipend, it was too small to be an effective incentive. To address this problem, the program shifted from an individual to a small-group mentoring model, in which the most effective male mentors were hired as part-time staff to work with several boys over a one-year period. This adaptation enabled the program to provide the boys with high-quality service and to provide adequate financial support to the participating mentors. It also alleviated pressure on program staff to constantly search for mentors.

A Broader View of Support

An intergenerational family-support program was originally funded to support children with disabilities and chronic illness. In trying to sustain the program over time, staff sought grants that expanded the target population to include children with mental health problems or learning disabilities, and those at risk of child abuse and neglect. Although its population changed, the essence of the program—older adults mentoring families—remained constant.

Be Prepared for Personnel Changes and Absences

One of the biggest risks to program stability is staff changes. When a key staff person leaves a program or has an extended absence, things can get messy or even fall apart. To offset the damage that can happen in these circumstances, there are a couple of things that a program can do. First, *put things in writing*. Your written materials should include a procedure manual for back-up or replacement staff, job descriptions that clearly outline program responsibilities, and signed letters of commitment to the program by administrators at partnering agencies. Second, make sure that you always *have a back-up staff liaison*.

Develop a Public Relations Plan

Engaging in public relations is an essential part of sustaining and institutionalizing your program. Public relations encompasses all the activities you do to achieve a positive public image, including advertising, media relations, sharing information about your program, and making personal appeals. A strong positive public image of your program will help you do the following:

- Strengthen your appeal to funders
- Attract and retain volunteers
- Build confidence among service recipients
- Enhance support and enthusiasm for your program among community members
- Attract top-notch staff

Public relations efforts can be both labor-intensive and expensive. To enhance the effectiveness of your efforts, it is helpful to develop a public relations plan. This involves four basic tasks: defining your program, establishing your public relations goals, deciding who you want to reach, and creating and implementing a marketing plan.

Define Your Program

Develop a short paragraph that communicates those aspects of your program that you most want people to remember. It should describe, *in a nutshell*, who you are, what you do, why you do it, and who you serve. Insert this description into all your public relations materials, for example, brochures, letterhead, press releases, Web sites, newsletters, and publications.

Experience Corps in a Nutshell

Experience Corps is a groundbreaking program that engages Americans age 55+ in vital public and community service. Today, more than 1,000 Experience Corps members serve as tutors and mentors to children in urban public schools in a dozen cities across the country. Experience Corps members help teach children to read and help them develop the confidence and skills to succeed in school and in life.(www.experiencecorps.org)

Establish Your Public Relations Goals

Before moving forward, decide what you want your public relations plan to accomplish. Do you want to recruit volunteers? Generate broad-based community support? Impress potential funders? Write down each goal. Then develop two or more short-term, achievable objectives for each goal you have identified. For example:

- **GOAL:** Recruit volunteers.

  OBJECTIVE: Within the next three months, inform participants at the local senior housing development about your intergenerational tutoring program.

- **GOAL:** Generate broad-based community support.

  OBJECTIVE: Within the next four months, gather materials that describe program-associated improvements in children's reading scores, and distribute them to school administrators, school board members, and local policymakers.

- **GOAL:** Raise awareness among potential funders.

  OBJECTIVE: Within the next six months, publish an article about the program in the local newspaper.

Decide Who You Want to Reach

Most intergenerational programs have many audiences: participants, volunteers, potential funders, older people, younger people, people who support the program, and the general public. Decide which of these groups you want to reach with your public relations campaign. How can these groups help you sustain your program? Why would they want to? Be judicious: Though you shouldn't always preach to the choir, neither do you want to spin your wheels trying to reach people who are highly unlikely to support your views or program.

Define your target audience as specifically as possible. This will help you market your program with greater precision. For example, a feature article in the local paper might be enough to draw the attention of a local foundation, but to solicit the support of national funders, you might need to publish articles in academic journals or make presentations at national conferences.

Create and Implement a Marketing Plan

There are many avenues for getting the word out about your program. These include:

- News releases
- Pitch letters
- Public service announcements
- News stories
- Brochures and flyers
- Web site *(your own, and links to others')*
- A video or slide show
- Individual and small-group meetings

- Public speaking engagements
- Advertisements
- Program or agency newsletters
- Booths or tables at public events
- Letters to the Editor
- Op-ed pieces
- Special events and public forums
- T-shirts, pens, key chains, etc. with the program's name, logo, and motto

When selecting a method, consider cost (both money and labor) and how effective the method is for reaching your target audience. For example, while producing a video is expensive and labor-intensive, it may be worth the investment if you plan to show it often. News releases are inexpensive, but they may not get attention from the media outlets receiving them. Brochures and flyers can be fancy and expensive or simple and inexpensive. Make sure that, regardless of price, your printed materials are attractive, easy to read, and well-written.

It is also important to foster relationships with reporters who cover your "beat" (e.g., older adults, schools, youth). One way to get their buy-in is to invite them to write profiles of older and young people in your program who have made strong connections with one another. But be selective in using your media contacts. If you bombard them with requests for coverage and press releases, you may risk turning them off. If you are part of a larger institution, such as a university or social service agency, there may be people in the organization who already handle media relations and can be helpful to you.

Groundwork
YONKERS

IMPROVING YONKERS *One Place at a time*

STRENGTHENING YONKERS *One Community at a time*

REVITALIZING YONKERS *One Step at a time*

GROUNDWORK
CHANGING PLACES
CHANGING LIVES

*Tell a Good Story.
A great advantage of marketing intergenerational programs is that the stories and images of older and young people working together are heartwarming and uplifting. Highlight the successful outcomes of these relationships.*

Public Relations Case Study: Groundwork Yonkers

Using the steps outlined above, the Groundwork Yonkers Green Team implemented the following successful public relations plan.

DEFINE YOUR PROGRAM

The Groundwork Yonkers Green Team is a community initiative in Yonkers, New York, that brings older adults and youth together to build gardens, plant trees, and paint murals in their neighborhood.

Groundwork's slogan is "Groundwork Yonkers—changing places, changing lives."

ESTABLISH YOUR PUBLIC RELATIONS GOALS

- To build trust of the organization in the neighborhoods it serves
- To be seen as a viable organization by funders and the local power structure
- To bolster community pride through visible environmental change
- To restore trust across generational and cultural lines
- To obtain recognition for participants and partners
- To increase program recognition

DECIDE WHO YOU WANT TO REACH

- Local community leaders, including informal and formal neighborhood leaders (such as church leaders), the mayor's office, and the city council
- Current and potential funders
- Program participants, their friends, and their families
- Members of the community

CREATE AND IMPLEMENT A MARKETING PLAN

- Articles have been written about Groundwork in several papers, including *The New York Times*. It's been featured on local television and was profiled in the *Connecting Generations, Strengthening Communities* video. A video of Groundwork Yonkers was shown at the international Groundwork conference in the United Kingdom.
- Groundwork set up an attractive and informative Web site (www.groundworkyonkers.org).
- Photos of local participants improving public spaces in Yonkers are on display at the Groundwork office.
- Weekend "work" days are held to engage more community residents in Groundwork's projects.
- Project celebrations are held to which the public is invited.
- Announcements about Groundwork's projects are made at community meetings.
- Signs crediting Groundwork Yonkers for its building, planting and public art efforts are posted at project sites.

In Closing

Keeping public attention focused on your project and finding financial support require ongoing effort. It takes skill and persistence to sustain an intergenerational program—but with some strategic planning, it can be done. By thinking creatively, you can use the flexibility of the intergenerational concept to your advantage when seeking funding—and you can use the compelling nature of projects that bring old and young together to keep your project's accomplishments in the public eye.

IN THE **CD-ROM Toolbox**

• **Links to Chapter 12 Resources**

Resources

The Federal Register, published by the Office of the Federal Register, National Archives and Records Administration, is the official daily publication of the federal government for a variety of policy documents, including grant and contract notices from federal agencies. It can be searched online at www.gpoaccess.gov/fr/index.html.

The Foundation Center's mission is to strengthen the nonprofit sector by advancing knowledge about U.S. philanthropy. Its Web site provides some free information to help get you started in learning about foundations and grant seeking. A subscription to the Foundation Center online enables you to search for foundations by interest area, location, and other criteria. Its web address is www.foundationcenter.org.

CD Publications sells on-line and paper subscriptions to newsletters that synthesize funding opportunities in a variety of areas of interest to intergenerational programmers, including education, community health, and children and youth. Free downloadable resources, as well as books and successful grant applications, can also be obtained from its web site, www.cdpublications.com.

Funding Across the Ages, published by Grantmakers in Aging, is a 40-page tool kit for grantmakers who want to understand the trends and grantmaking opportunities resulting from the aging of our communities. While this tool kit was designed for grantmakers, nonprofit agencies will also find useful information, including easy-to-locate overviews, funding strategies, sample grants, and resources on such topics as children and youth, education, neighborhoods, housing, community development, and health. The tool kit may be downloaded from Generations United's Web site, www.gu.org.

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Chapter 13

Fostering an Intergenerational Society

The best way to predict the future is to create it.

—Peter Drucker,
management consultant

Most of the material in this handbook offers practical advice on the planning and implementation of intergenerational programs. It was created primarily to help program planners create or improve particular projects in their own unique communities. However, if you step back for a moment from the many pressing tasks involved in running a successful intergenerational program, you will see that no single program on its own can create a community that is supportive of people of all ages.

Therefore, this final chapter offers a view of intergenerational work that will help you see your program in a wider social and political context. It explores the relationship between intergenerational practice and public policy, and outlines an innovative, life span approach to community building.

CONNECTING INTERGENERATIONAL PRACTICE TO PUBLIC POLICY

For individuals working directly in communities, a discussion of "public policy" may feel distant and irrelevant. It is often difficult to see how the abstract language of laws created in Washington, D.C., or even in your own state capitol, will have an impact on the day-to-day work of serving families in communities. However, if you view public policy through an intergenerational lens, you will see that several major public policies are relevant to intergenerational programs. You and your program participants can influence public policy in a variety of ways, which are described below.

An Intergenerational Policy Agenda

Adapted with permission from materials written by Jaia Peterson of Generations United (2004).

The world of public policy has experienced a history of efforts to pit different generations against one another, especially when resources are scarce. Some claim that intergenerational conflict is an inevitable outcome of our currently stressed economy. Yet, constructive public policies that support and involve people across the life span can actually put limited resources to better use.

Generations United, a national nonprofit organization dedicated to promoting intergenerational public policies and programs, was formed to find common ground between organizations focusing on children or the elderly. Through its work, leading organizations serving children and older adults have come together to develop an intergenerational public policy agenda that represents the interests of all generations in federal policies.

Generations United identifies a policy as "intergenerational" when it has an impact across the generations, such as policies that authorize the Medicaid program. Other types of intergenerational policies are those that incorporate an intergenerational approach to addressing an issue, such as policies that support programs in which older people mentor at-risk children. These policies recognize that resources are more wisely used when they connect the generations rather than separate them.

Using an intergenerational approach to examine public policy issues also means asking some specific questions, for example:

- Are people of all ages being viewed as resources?

- Does the policy promote interdependence between generations?

- Is the policy sensitive to intergenerational family structures, e.g., grandparents who are raising grandchildren?

- Does the policy encourage intergenerational transfers through shared care or services?

There are many policies that can be considered intergenerational in scope, even though they're not usually defined as such. Below are some important policies to keep on your radar screen.

The National Family Caregiver Support Program

The National Family Caregiver Support Program (NFCSP), created in 2000 under the Older Americans Act, gives funding to states to provide support services to family caregivers. States can use NFCSP funds to offer information and referrals, individual and family counseling, respite care, and other supplemental services. Services funded through NFCSP can provide support to participants in intergenerational programs.

NFCSP was initially designed to provide support to family members who are caring for aging or disabled relatives. On hearing this, Generations United launched a campaign to educate Congress on issues facing grandparents raising children. Generations United communicated the message that older adults not only receive but also provide care, and should be supported in their role as caregivers of children. Because of these efforts, grandparents and the children in their care were included in the final legislation, making these caregivers and their family members eligible to receive supportive services (Administration on Aging, 2003).

Corporation for National and Community Service

This federal agency oversees a variety of community service programs that are often explicitly intergenerational in their design. Learn and Serve supports educational institutions and nonprofit organizations in promoting service-learning, an important tool in encouraging young people to embrace civic participation. Through AmeriCorps, 50,000 people—mostly young—serve their neighbors through local and national not-for-profit organizations. Senior Corps is the umbrella for three programs that involve more than a half-million older adults in community service: Foster Grandparents, the Retired Senior Volunteer Program, and Senior Companions.

Social Security

Since its inception, Social Security has been the exemplar of an intergenerational policy, as workers of all ages contribute to and will ultimately benefit from this program. Furthermore, though many think of Social Security as a retirement program, 30 percent of its beneficiaries are children and adults under the age of 64. In early 2005, as this handbook goes to press, significant changes to Social Security are being proposed. Keeping accurately informed about and involved in this debate is a pressing task for advocates of intergenerational policies.
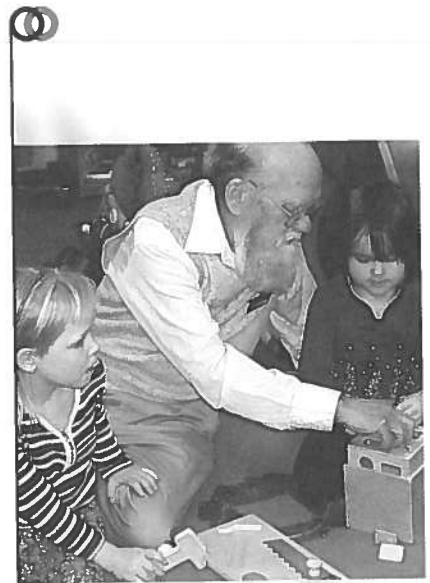
21st Century Community Learning Centers

This large-scale federal program includes language that encourages older adults to be involved in after-school programs as tutors. Between 2001 and 2003, appropriations for these centers were approximately $1 billion per year. For information on a center near you, visit the U.S. Department of Education's Web site at www.ed.gov.

The Legacy Bill

This bill was designed to improve access to and increase the supply of housing available to grandparents and other relatives raising children. In 2003, several provisions of this legislation were signed into law. These include creation of national demonstration projects to establish housing communities built for grandparents raising grandchildren, and training for housing workers on policy issues that affect grandparent-headed households. Efforts to fully enact housing support for these families will continue.

The Lifespan Respite Care Act

Passed by the Senate in 2003, this legislation addresses the needs of those who care for family members, including grandparents raising grandchildren, parents of children with special needs, and working adults caring for an infirm elderly parent. The Act authorized $90 million in competitive grants for states and other entities to expand services to family caregivers of all ages. However, the Act was not enacted by the House of Representatives. As of January 2005, advocates were generating grassroots support for the reintroduction of the bill for passage by both the House and the Senate.

Local Policies

Many local policies have the potential to support intergenerational initiatives. Many school policies, for example, support service-learning, after-school programs, the use of tutors and mentors, and cross-age educational programs. You can advocate for making these policies more "intergenerational-friendly." Does your county provide transportation for older adult and teen volunteers? Will your municipality grant a zoning variance to turn a vacant commercial space into a garden created and maintained by an intergenerational team? The possibilities are endless!

Becoming an Advocate

People who work in nonprofit organizations often believe that their tax-exempt status prohibits them from engaging in policy advocacy. They are mistaken. While nonprofits are not allowed to engage in partisan politics (i.e., they cannot endorse specific candidates or political parties), they may (and should!) do the following:

- Advocate for program funding

- Educate policymakers about issues confronting communities and the populations within those communities

- Inform stakeholders (staff, volunteers, and service recipients) about the personal and programmatic effects of policies

- Inform stakeholders about individual lawmakers' positions on specific issues and on how to effectively lobby for change

Lobbying

Some organizations are permitted to lobby for or against laws and regulations that affect the populations they serve, and some are not. For example, if you receive federal funding, you will have to use other funding sources to cover time spent lobbying. A little research on your funder's lobbying rules will help you know what is and isn't allowed.

Strategies suggested by Charity Lobbying in the Public Interest, an organization that encourages charities to lobby on behalf of their constituents and causes, include the following (excerpted from Arons, 2001, with permission from Charity Lobbying in the Public Interest):

- *Study the legislative process.* Understand the process by which a bill becomes a law.

- *Review the relationship between your organization and government.* Develop a comprehensive list of the ways that government, at all levels, affects your ability to provide services.

- *Create a "Who's Who" list* of people who are in positions of influence with regard to your programs and services.

- *Take stock of your human resources.* Make a list of key people who work for, volunteer for, or are served by your organizations who would be willing to contact their elected officials on behalf of your cause.

- *Build a public policy presence.* Attend a coalition meeting of another organization working on similar public policy issues. Your presence will send a strong signal that your organization cares about this issue.

- *Become a source of reliable information.* Send a packet of information that includes a description of your organization, your public policy agenda, and a personalized letter to key officials whose decisions affect your cause. Invite them to visit or take a tour of your program.

- *Build relationships with policymakers.* Meet with officials to inform them of the policies your organization supports. Explore how you can work together to achieve public policy goals.

- *Meet face to face.* There is no form of communication as powerful as meeting in person. Arrange to meet with legislators at their offices.

- *Know the staff.* Find out which legislative staff member works on your issue and get to know that person.

- *Use the telephone.* Make calls to describe how a change in law would affect your programs and constituents.

- *Write a letter.* A well-written letter from a constituent is one of the most influential ways of communicating with a legislator.

- *Testify.* Include data about the impact of your services along with your recommendations for action on the issue.

> *Involve your volunteers, service recipients, and board members in all your contacts with policymakers. Personal stories from older adults, families, and young people are frequently more powerful than your stated professional agenda.*

- *Give credit when credit is due*. Send officials a letter of congratulations when they act in a way that is helpful to your cause.

- *Build relationships with the media and keep them informed*. Write letters to local or regional newspapers about how pending policy issues would affect your cause. Meet with the writer who covers the beat most closely related to your work.

- *Initiate grassroots support*. Write Action Alerts to volunteers, donors, and constituents urging them to contact elected representatives about policies and pending legislation.

BUILDING COMMUNITIES FOR ALL AGES

Advocating for national policies that support intergenerational work is only one way to foster an environment in which intergenerational programs and relationships can flourish. If you are more comfortable acting locally, you might consider a model developed by the Temple University Center for Intergenerational Learning, which offers a holistic approach to promoting well-being for residents of all ages within an individual community. Called *Communities for All Ages*, this theoretical framework addresses community building with an explicit life-span perspective.

A *Community for All Ages* is an intentional network of relationships, formal and informal activities, and services and systems that support the well-being of all age groups within a discrete geographic area, such as a neighborhood, town, or county. Based on a thorough review of research on community building, as well as results from a series of focus groups and workshop discussions, this vision for strengthening communities was developed with support from the Annie E. Casey Foundation. Its goal is to help communities strengthen families; develop strategies for promoting the well-being of children and older adults; and provide opportunities for ongoing, mutually beneficial interaction across age groups. This holistic approach has the potential to stretch and leverage resources and to build inclusive rather than competitive constituencies for neighborhood change. It acknowledges that priorities and issues among age groups intersect at many points, as do programs and policies that address those issues.

What Might a Community for All Ages Look Like?

In a *Community for All Ages*, agencies, organizations, private businesses, and individuals work together to:

- intentionally promote the well-being of children, youth, older adults, and families

- make full use of the assets of people at every stage of life

- actively promote interaction and interdependence across ages

What Are the Core Values of Communities for All Ages?

For a community-building initiative or process to be successful, it is important that a set of shared values guide participants' vision and actions. The following values drive the *Communities for All Ages* framework:

- *Interdependence*. People feel a sense of shared responsibility for one another. There is an emphasis on reciprocal sharing of resources across generations; people of all ages rely on one another for care, support, and nurturing.

- *Reciprocity*. People of all ages have opportunities to give as well as to receive support—to teach as well as to learn.

- *Individual worth*. Each individual, regardless of age, race/ethnicity, gender, or other variables, deserves respect and care, is entitled to equal access to the community's resources, and can contribute to the community in some way.

- *Diversity*. Differences among community members are recognized and celebrated. Efforts are made to foster understanding across diverse groups.

- *Inclusion*. Policies and programs are designed for all members of the community.

- *Equity*. Fairness is reflected in all policies and services. Advocates for the young and the old are not pitted against one another for limited resources.

- *Social connectedness*. Social relationships are viewed as vehicles for enhancing the everyday lives of community members. Formal networks foster opportunities for connection across ages and cultures, thus building a shared sense of community.

MOUNT KISCO DAY CARE CENTER

What Are the Core Elements of a Community for All Ages?

In a Community for All Ages, formal institutions (such as agencies, schools, health care providers, and municipal departments) and informal networks (family, friends, neighbors) seek to integrate the following core elements into the fabric of the community.

Support for Caregiving Families and Dependent Populations

Community-based, accessible services are provided to support families caring for young children, people with disabilities, and older adults, with assistance available to navigate service delivery systems. Developmentally appropriate care is offered to dependent populations. Various kinds of family structures (e.g., kinship care) are acknowledged, and services are available to respond to the unique needs of these families.

Access to Quality Health Care and Social Services

Age- and culturally appropriate health, mental health, and social services are available across the life span. Community activities are designed to respond to the developmental needs of children, youth, and older adults.

Opportunities for Lifelong Learning

Educational institutions are utilized as centers for lifelong learning. Quality education and opportunities to extend learning are available for people of all ages, with older adults included as both learners and teachers, tutors, or mentors.

Solid Infrastructure and Opportunities for Lifelong Civic Engagement

People of all ages are involved in community planning efforts, and there is a social expectation of service at all stages of life. A range of opportunities for traditional volunteer, volunteer work with a stipend, and paid work is available for all age groups, and a solid infrastructure exists to facilitate the recruitment, training, placement, and support of people engaged in service.

Policies that Promote Health and Development and Meet Basic Needs Across the Life Span

Institutions have a life-span focus and address the needs of individuals at all stages. A seamless continuum of services exists to support children, youth, adults, and families.

Planned Efforts that Promote Meaningful Cross-Age Interaction

Structured opportunities exist for cross-age and cross-cultural interaction. These opportunities allow all age groups to identify common issues, engage in community improvement projects, and come to a better understanding of one another's needs, strengths, and perspectives.

Collaboration Across Systems and Organizations

Partnerships exist across systems serving different age groups. Age-integrated funding streams are available to facilitate collaborative efforts.

A Physical Environment that Promotes Healthy Living and Supports Changing Needs Across the Life Span

Diverse, affordable, and accessible housing options are available. Transportation systems enable people to maintain their independence. Land use patterns foster social interaction across diverse groups.

Turning the Vision into Reality

Does all of this sound too good to be true? Not in the view of the Arizona Community Foundation. In 2003, the foundation began a multi-year initiative intended to implement the *Communities for All Ages* model in diverse communities throughout Arizona. As a result, locales throughout the state have started to build communities based on intergenerational interdependence.

The initiative has involved three stages:

- Regional conferences to raise awareness of the *Communities for All Ages* concept

- The selection of nine pilot sites each of which engaged in a needs and resource assessment process to develop a *Communities for All Ages* plan

- The funding of implementation sites

In each community, a *Communities for All Ages* team, comprised of representatives from a variety of nonprofit and governmental organizations as well as younger and older residents, was involved in the assessment and action planning process. From the outset, the foundation underwrote consultation services to grantees to assist with program design, implementation, evaluation, and fundraising. In addition, quarterly learning sessions were conducted to facilitate resource sharing among communities.

The following are some of the plans that are being implemented:

- Concho, an impoverished rural area of Northeast Arizona, is building a community center that offers a range of programs to all age groups, creating a historical mural, and publishing an intergenerational community newsletter.

- Ajo, a low-income border town, is creating a Multi-generational Learning Center that will offer arts, vocational, educational, and leadership programs as part of a new "Village for All Ages" that is anchored by 45 affordable residences for artisans and their families.

- Largely Hispanic urban neighborhoods in Phoenix and Tuscon are involving residents of all ages in intergenerational service-learning, oral history, leadership training, and neighborhood development projects.

- Generations United of Yavapai County has been created to provide support to local intergenerational community action teams that engage in specific projects (e.g. clean-up, beautification, planning of shared sites).

IN CLOSING

Moving toward this vision will require attitudinal, behavioral, and cultural change at both the individual and the institutional levels. It is clear that we need a new way of doing business and of relating to one another as human beings. Rather than focusing on competition and individualism, we need to think about collaboration and community. Rather than promoting exclusively cause-based activism, we need to participate in place-based activism as well. This holistic, life-span approach to community building can be an effective vehicle for promoting social cohesion and positive social change.

As an essential component of the *Communities for All Ages* model, intergenerational programming not only enhances the lives of residents, it also builds a sense of shared responsibility that can help a civil society flourish. As we try to cope with the uncertainties of the future, we will need strong, resilient communities in which people support and nurture one another from generation to generation. Your program can play an essential role in helping to build meaningful relationships and stronger communities.

Communities for All Ages isn't just a program, it's a way of thinking.
– Program Manager

IN THE **CD-ROM Toolbox**
- *Communities for All Ages* **Article**
- **Links to Chapter 13 Resources**

Resources

Families USA is a non-partisan organization dedicated to the achievement of high-quality, affordable health care for all Americans. Its web site has up-to-date information on health care policy issues that affect people across the life span. Go to www.familiesusa.org.

Generations United's model for creating an intergenerational public policy agenda could be replicated on the state and local levels to work to the advantage of children and families and to the benefit of the larger community. You can sign up for legislative updates and read more about intergenerational policies at www.gu.org.

The organizations *Charity Lobbying in the Public Interest* (www.clpi.org) and *Independent Sector* (www.independentsector.org) both provide extensive and free information on how nonprofit organizations can influence public policy.

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