

# **Volunteer Consultants: Extending the Reach of Ombudsman Programs**



Prepared by The National Association of State Units on Aging

## **National Long-Term Care Ombudsman Resource Center**

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### **Acknowledgements**

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### **About the Author**

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The National Association of State Units on Aging (NASUA) is a private, nonprofit organization whose membership is comprised of the 57 state and territorial offices on aging.

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May 2003

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# Volunteer Consultants: Extending the Reach of Ombudsman Programs

## Introduction

The Long-Term Care Ombudsman Program has traditionally relied on volunteers to fulfill its mandated requirement to serve residents in long-term care facilities. According to statistics from the National Ombudsman Reporting System (NORS), in 2001, 90% (47) of state ombudsman programs used volunteers in some capacity to meet their mandated responsibilities and expand the reach of their programs. A slightly smaller percentage 71%, (37) authorized volunteers to handle complaints.<sup>1</sup> These volunteers are referred to as "certified" volunteers.<sup>2</sup> NORS statistics also reveal a 47.5% increase in complaints handled by the Ombudsman Program from 1996 to 2001.<sup>3</sup> With demand for ombudsman services growing, paid staff will be further stretched to meet these increased needs, and volunteers will play an even more vital role in the program.

Retired and active professionals are typically recruited as volunteers in the ombudsman program. These volunteer ombudsmen are trained and assigned to carry out the duties of a program representative, including visiting residents on a regular basis to monitor the care being provided in long-term care facilities and/or investigating complaints. Some volunteers are also used in ways that take advantage of their professional knowledge and expertise to assist the program with a particular activity or task.

Webster's Dictionary defines *consultant* as one who gives professional advice or services. **In this paper, the term "volunteer consultant" is used to describe a professional who, without reimbursement, provides technical assistance, case consultation, advice/guidance, or advocacy support to the Ombudsman Program for the purpose of helping the program with specific tasks related to the professional's area of expertise.** Volunteer consultants may be active or retired professionals and may be used on a regular or as-needed basis. Professionals in agencies with which the program routinely interacts, such as Adult Protective Services (APS), state health surveyors, and other agencies are not considered consultants although individuals in such programs may provide expertise to the Ombudsman Program on issues that fall under their programs' jurisdictions. Similarly, professionals who volunteer their time to assist

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<sup>1</sup> Administration on Aging, NORS data, 2001

<sup>2</sup> NORS instructions.

<sup>3</sup> Administration on Aging, NORS data, 2001.

the program by serving on committees or boards that provide advice and counsel to the ombudsman program are not considered volunteer consultants.<sup>4</sup>

## Approach

State ombudsmen were surveyed in the fall of 2001 to obtain information on their use of volunteer consultants. The survey addressed four key questions about the use of volunteer consultants:

- the types of **professionals** programs use as consultants;
- the types of **activities** on which consultation is provided;
- whether the program has a **written policy or agreement** governing the use of consultants; and
- strategies used to **recruit** consultants with specific areas of expertise.

State ombudsmen were also asked whether their programs use volunteer consultants at the state and/or local level. If they indicated that local programs used volunteer consultants, those programs were then sent a separate survey instrument. The survey was sent to 52 state ombudsmen and seven local ombudsman programs. The state and local survey instruments are attached in Appendices A and B respectively.

## Responses

Twenty-five state ombudsmen responded to the survey. Of these, **ten ombudsman programs (3 state and 7 local) reported that they use volunteer consultants as defined in the survey.** Contact information for these programs are listed in Appendix C.

The ten ombudsman programs that use volunteer consultants include:

### State Long-Term Care Ombudsman Programs (SLTCO)

- ♦ New Mexico
- ♦ Rhode Island
- ♦ West Virginia

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<sup>4</sup> West Virginia, Appalachian Legal Services LTC Ombudsman Program uses an ethics committee comprised of a Director of Nursing, psychiatric nurse, clergy member, medical ethicist, physician, aging professional, attorney, public health worker, hospital social worker, and a nursing home administrator to help review difficult cases.

In Georgia, the State Ombudsman Program requires all local ombudsman programs to develop an advisory council for the program to assist with planning and operation and assist the program with special projects. According to Becky Kurtz, State Ombudsman, these councils frequently include individuals with clinical, legal, or public policy advocacy expertise who are able to assist the programs in a consultant capacity.

### Local Long-Term Care Ombudsman Programs (LTCOP)

- ♦ West Central Georgia LTCOP (Georgia)
- ♦ Georgia Mountains LTCOP (Georgia)
- ♦ McIntosh Trail Management Services LTCOP (Georgia)
- ♦ Heart of Georgia LTCOP (Georgia)
- ♦ Nursing Home Ombudsman Agency of the Bluegrass, Inc. (Kentucky)
- ♦ Montgomery County LTCOP (Maryland)
- ♦ West Virginia LTCOP - Appalachian Legal Services (West Virginia)

While the sample of programs is relatively small, the information these ombudsman programs provide about volunteer consultants demonstrates innovative and replicable ways state and local ombudsman programs can use volunteers to assist their programs.

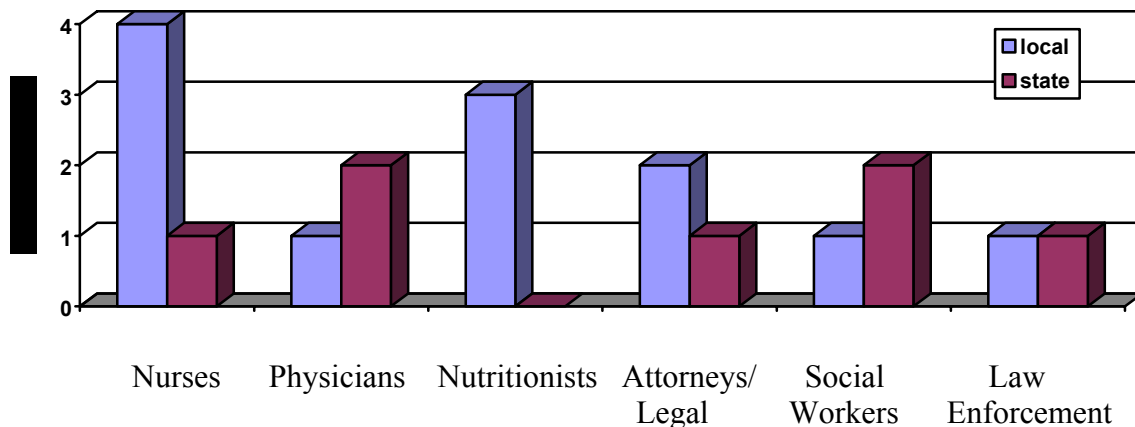
## **Use of Volunteer Consultants by Ombudsman Programs**

### **Types of Volunteer Consultants**

Survey results reveal that five of the ten ombudsman programs that reported using volunteer consultants use different types of professionals for specific tasks. **Nurses (RNs, LPNs) are, according to the survey, the most commonly used type of professional --- 50% (5) of the programs report using them in a volunteer consultant role.**

In addition to nurses, the most frequent types of professionals used by state and local programs are physicians, nutritionists, attorneys/legal professionals, social workers, and law enforcement personnel, as illustrated in the graph below. Other types of professionals being used by local ombudsman programs include ethicists, clergy, businesspersons, and statisticians.

**Types of Professions used as Volunteer Consultants**



## How Volunteer Consultants Are Used

The survey revealed that some volunteer consultants already serve as volunteer ombudsmen but take on this new role because of their special expertise. Other volunteer consultants are specifically recruited by the ombudsman program to handle a particular task.

As shown in the chart below, volunteer consultants are used by ombudsman programs to support a variety of functions at both the state and local level, including providing assistance with complaint investigations, training, program management and development, consumer education and program quality. The survey results show that of **the ten programs that use volunteer consultants, most use them to assist with some aspect of complaint investigations (5 programs) and/or to conduct training activities (4 programs).**

### How Volunteer Consultants Are Used

	Volunteer Consultants at the Local Level <sup>5</sup>							Volunteer Consultants at the State Level		
	GA (1)	GA (2)	GA (3)	GA (4)	KY	MD	WV	NM	RI	WV
Type of Program Support										
Complaint investigation	●	●					●	●		●
Fund Raising			●							
Grant writing			●							
Training	●	●	●	●						
Consumer Education		●		●				●		
Program promotion			●	●				●		
Program evaluation						●				
Other					●				●	

#### <sup>5</sup> Key for local programs:

Georgia Programs:

- (1) = West Central Georgia Ombudsman Program
- (2) = Georgia Mountains LTCO Program
- (3) = McIntosh Trail Management Services LTCOP
- (4) = Heart of Georgia LTCOP

Kentucky:

Nursing Home Ombudsman Agency of the Bluegrass

Maryland:

Montgomery County LTCOP

West Virginia:

WV LTCOP - Appalachian Legal Services

The survey findings indicate that both state and local programs find it helpful to use volunteer consultants, and that volunteer consultants have been used successfully to assist with complaint investigations, consumer education and promotion of the ombudsman program. Local ombudsman programs are most likely to use volunteer consultants for complaint investigations and training. While the survey did not explicitly ask about the frequency with which volunteer consultants were used, some respondents indicated that consultants are used on an as needed basis, while others have been used only once (i.e., speaker at a training).

Examples of how ombudsman programs are using volunteer consultants include:

- ♦ Heart of Georgia LTC Ombudsman Program uses a minister, retired teachers and businesspersons for **community education and program promotion activities**.
- ♦ McIntosh Trail Management Services LTC Ombudsman Program in Georgia uses a retired professor to assist with **fund raising and grant writing**.
- ♦ Montgomery County, Maryland LTC Ombudsman Program uses a nurse to provide **program quality assurance** by reviewing all ombudsman complaints for content and signatures before closing.

Some programs are using professionals as consultants in unique and innovative ways:

- ♦ The Nursing Home Ombudsman Agency of the Bluegrass in Kentucky reports using a **statistician** from an area university to **analyze complaint data and spot trends** concerning resident abuse and neglect in nursing homes. This data has been used in advocacy efforts with the legislature to address the identified concerns.
- ♦ The **Rhode Island** Ombudsman Program has conducted in-services for **probate judges** to inform them about the Ombudsman Program. When the ombudsman program encounters family conflicts or exploitation that prevents family guardians from acting in the best interest of the elderly person, one of the probate judges who has received information about the program is usually contacted. The judge typically provides guidance to program staff on the case and often encourages the program to file an amicus brief with the court of jurisdiction.



**Ombudsman programs use volunteer consultants in ways that make use of their professional expertise but not all programs use these professionals the same way.** For example, of the five programs that use nurses as volunteer consultants:

- ♦ three (West Central Georgia, Georgia Mountains, New Mexico SLTCO) use them as consultants on complaint investigations
- ♦ three (West Central Georgia, Georgia Mountains, McIntosh Trail) use them to assist with training
- ♦ two (Georgia Mountains, New Mexico SLTCO) use them for consumer education activities
- ♦ two (McIntosh Trail, New Mexico SLTCO) use them in activities related to promotion of the ombudsman program
- ♦ one (Montgomery County, Maryland) uses them to assist with program evaluation and quality efforts, and
- ♦ one (McIntosh Trail) uses them to assist with fund raising.

A recent edition of *Nursing Spectrum* magazine features an article on the contributions of nurses to the ombudsman program. Nurses from around the country were interviewed for the article, which highlights the special knowledge that nurses can bring to the ombudsman program, including an understanding of treatment practices, disease stages and medication issues. One of the nurses interviewed reported volunteering as a consultant to the program before becoming a volunteer ombudsman in the traditional sense and eventually, director of a local ombudsman program.<sup>6</sup>

While ombudsman programs report using physicians and attorneys for activities that include complaint investigations, training, and consumer education, McIntosh Trail, Heart of Georgia, and the New Mexico SLTCO also use them to perform activities not usually associated with their professions: grant writing and program promotion activities. Likewise, two programs (West Central Georgia and McIntosh Trail) use nutritionists for training and the Heart of Georgia LTCOP uses nutritionists to conduct consumer education efforts. The most extensive use of volunteer consultants is reported by the New Mexico State Long-Term Care Ombudsman Program which uses physicians/medical personnel, nurses, attorneys, law enforcement officials and social workers to help with complaint investigations, consumer education, program promotion, and legislative and public policy efforts.

## **How Volunteer Consultants Are Identified and Recruited**

Finding and recruiting volunteer consultants varies by program, according to the survey responses received. **Generally, local programs rely on community networking with other agencies and using community education activities as opportunities for volunteer recruitment.** Two state ombudsman programs report that they target specific professions for recruitment as consultants.

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<sup>6</sup> Bonifazi, Wendy L. *Ombudsmen: Elder Advocates Are Allies for Care*. Nursing Spectrum. April 1, 2003.

- ♦ The Rhode Island State LTC Ombudsman Program educates probate judges about the program
- ♦ The New Mexico State LTC Ombudsman Program has targeted the New Mexico Senior Division of the State Bar as a source of potential volunteer consultants.

While local programs are more likely to recruit a volunteer consultant to assist them with a particular task or function, state ombudsman programs are more likely to see volunteer recruitment as an opportunity to develop relationships with specific groups of professionals. This difference may be reflected in the approaches used to recruit volunteers at the state and local levels.

In general, ombudsman programs use various methods to recruit volunteer consultants by:

- ♦ targeting current volunteer ombudsmen with special expertise;
- ♦ recruiting members of a specific profession or persons with a specific talent or expertise;
- ♦ obtaining recommendations from another ombudsman or community organization connected to or familiar with the program.

## **Policies and Agreements**

According to this survey, volunteer consultants are not widely used. Thus, it is not surprising that only a few programs have developed specific policies for approving the qualifications of and using this special type of volunteer. Typically, ombudsman programs have an informal arrangement with the volunteer consultant. Two ombudsman programs, Heart of Georgia and the Maryland SLTCO require volunteer consultants to sign a formal agreement specifying the volunteer's commitment and adherence to certain rules of confidentiality. Programs that have stipulated requirements for the use of volunteer consultants:

- ♦ The Maryland State Ombudsman Program requires local ombudsman programs to enter into a written agreement with all volunteers, including volunteer consultants. Each volunteer must also sign a "Pledge of Confidentiality" outlining the types of information which are confidential and warning that any breach could be considered a violation of law subject to fines and penalties (see Appendix D). This is standard practice so volunteers clearly know what is expected of them and understand the seriousness of maintaining confidentiality. Since the Montgomery County Ombudsman Program reports using a volunteer consultant to review complaint records, the "Pledge" is particularly important. Volunteer consultants are also required to attend the same training as other volunteer ombudsman. This requirement ensures that all volunteers understand what the ombudsman program is about and allows the local program manager to assess how each volunteer can best

assist the program. This also ensures that the volunteer consultants are able to take on additional tasks if necessary.

- ♦ The Heart of Georgia LTCOP requires volunteer consultants to meet some of the same requirements mandated for traditional volunteer ombudsmen. Volunteer consultants must also enter into a "Volunteer Agreement" and sign a "Confidentiality and Conflict of Interest" form (see Appendix E). The "Volunteer Agreement" specifies the ombudsman program's commitment to provide training and supervision and the volunteer's commitment to perform assigned duties, and adhere to program policy regarding record keeping, conflict of interest and the program's code of ethics. The "Confidentiality" statement ensures that volunteers understand the need to maintain confidentiality concerning complaint cases, residents and facilities. The "Conflict of Interest" statement was developed so volunteers would understand their responsibility to disclose any potential conflicts prior to or during their work as a volunteer. The statement identifies potential conflicts as: a financial interest in a facility; a family member in a long-term care facility monitored by the ombudsman program; a direct involvement in the licensing or certification of a facility monitored by the ombudsman program; providing services, including personnel, to a long-term care facility; and operating a program which controls access to long-term care facilities.

## Summary

Ombudsman programs that are utilizing volunteer consultants are generally doing so on an informal, as-needed basis. These consultants may be drawn from an existing pool of ombudsman volunteers or recruited through the networking activity of the ombudsman program. Volunteer consultants may provide assistance only once or on an as-needed basis. However volunteer consultants come to the program, their expertise is recognized as valuable to some identified task, activity or issue with which the ombudsman program needs specialized assistance.

### Questions to Consider

As programs explore the use of volunteer consultants or formalize the use of professionals to support the ombudsman program in specific ways, the following questions should be considered:

- What program activities or special needs exist with which volunteer consultants could be used?
- What is the best way to recruit specific types of professionals?
- If volunteer consultants will be privy to client-specific information, how will the issue of confidentiality be addressed?

## APPENDIX A

### Volunteer Consultant Survey (State Ombudsmen)

## Volunteer Consultant Survey

NASUA is developing a technical assistance paper for the National LTC Ombudsman Resource Center examining the use of **volunteer consultants** by state and/or regional Ombudsmen Programs. We would appreciate your response to the following short survey. For purposes of this survey, a **volunteer consultant is any professional who, without reimbursement, provides technical assistance, case consultation, advice/guidance, or advocacy support for the Ombudsman Program for the purpose of helping the program with specific tasks related to the professional's area of expertise.** Volunteer consultants may provide such support on an on-going or temporary basis. Professionals in other agencies with whom the Ombudsman may routinely interact during the course of investigations, such as Adult Protective Services, state health surveyors, licensing specialists, etc., are not considered consultants for purposes of this study.

**State:** \_\_\_\_\_  
**Person completing this survey:** \_\_\_\_\_  
**Telephone:(\_\_\_\_)** \_\_\_\_\_  
**Email:** \_\_\_\_\_

1a. Does the ombudsman program use **volunteer consultants** at the state level?

Yes \_\_\_\_\_ No \_\_\_\_\_

1b. Does the ombudsman program use **volunteer consultants** at the local level?

Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, please provide the name, agency address, phone and fax numbers of the local ombudsman program(s) that use volunteer consultants so we can forward a survey to them. If you have more than two local programs using volunteer consultants please attach additional contact information on a separate sheet of paper.

Contact name: _____	Contact name: _____
Agency: _____	Agency: _____
Address: _____	Address: _____
_____	_____
_____	_____
Phone: _____	Phone: _____
Fax: _____	Fax: _____
Email: _____	Email: _____

State: \_\_\_\_\_

If you answered "Yes" to either question 1a. or 1b. please respond to the following questions, and complete the attached checklist.

2. Does the ombudsman program have a written policy describing the role(s) of **volunteer consultants**?

Yes \_\_\_\_\_ No \_\_\_\_\_

If yes please attach a copy of the written policy.

3. Are **volunteer consultants** required to enter into a formal written agreement?

Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, please attach a copy of the written agreement.

4. Is the State Ombudsman's approval required when **volunteer consultants** are used by local/regional ombudsman programs?

Yes \_\_\_\_\_ No \_\_\_\_\_

5. Please describe any successful techniques or strategies the ombudsman program has used to recruit or enlist **volunteer consultants**.

6. Please complete the attached checklist indicating how various types of **volunteer consultants** are used by the ombudsman program at the state and/or local/regional level.

Please complete this survey by **October 31, 2001**, and return it by mail, fax or email to:

Mark Miller  
NASUA  
1201 15<sup>th</sup> Street, NW, Suite 350  
Washington, DC 20005  
(202) 898-2578  
Fax: (202) 898-2583  
Email: [mmiller@nasua.org](mailto:mmiller@nasua.org)

## APPENDIX B

### Volunteer Consultant Survey (Local / Regional Ombudsmen)

**Volunteer Consultant Survey**  
(Local/Regional Ombudsman Programs)

We received information from your State Ombudsman Program that your local/regional Ombudsman Program utilizes volunteer consultants, and would like for you to complete the following survey. For purposes of this survey, a **volunteer consultant is any professional who, without reimbursement, provides technical assistance, case consultation, advice/guidance, or advocacy support for the Ombudsman Program for the purpose of helping the program with specific tasks related to the professional's area of expertise.** Volunteer consultants may provide such support on an on-going or temporary basis. Professionals in other agencies with whom the Ombudsman may routinely interact during the course of investigations, such as Adult Protective Services, state health surveyors, licensing specialists, etc., are not considered consultants for purposes of this study.

**Name of Local Ombudsman Program:** \_\_\_\_\_

**Agency:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Telephone:**(\_\_\_\_) \_\_\_\_\_ **Fax:** (\_\_\_\_) \_\_\_\_\_

**Email:** \_\_\_\_\_

**Person completing this survey:** \_\_\_\_\_

1. Does the local ombudsman program use **volunteer consultants**?

Yes \_\_\_\_\_ No \_\_\_\_\_

If you answered "Yes" please respond to the following questions, and complete the attached checklist.

2. Does the local ombudsman program have a written policy describing the role(s) of **volunteer consultants**?

Yes \_\_\_\_\_ No \_\_\_\_\_

If yes please attach a copy of the written policy to this survey.

3. Are **volunteer consultants** required to enter into a formal written agreement?

Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, please attach a copy of the written agreement.



Name of Local Program: \_\_\_\_\_

4. Is the State Ombudsman's approval required when **volunteer consultants** are used by the local/regional ombudsman program?

Yes \_\_\_\_\_ No \_\_\_\_\_

5. Please describe any successful techniques or strategies the local ombudsman program has used to recruit or enlist **volunteer consultants**.

6. Please complete the attached checklist indicating how different volunteer consultants are used by the local ombudsman program.

Please complete this survey by **November 7, 2001**, and return it by mail, fax or email to:

Mark Miller  
NASUA  
1201 15th Street, NW, Suite 350  
Washington, DC 20005  
(202) 898-2578  
Fax: (202) 898-2583  
Email: [mmiller@nasua.org](mailto:mmiller@nasua.org)

## APPENDIX C

### Ombudsman Programs that Use Volunteer Consultants

## **Ombudsman Programs that Use Volunteer Consultants**

### State Ombudsman Programs

New Mexico State Long-Term Care Ombudsman Program  
1410 San Pedro, NE  
Albuquerque, NM 87110  
(505) 255-5602  
contact person: Katrina Hotrum, State Ombudsman

Rhode Island State Long-Term Care Ombudsman Program  
Alliance for Better Long Term Care  
422 Post Road, Suite 204  
Warwick, RI 02888  
(401) 785-3340  
contact person: Roberta Hawkins, State Ombudsman

West Virginia Long-Term Care Ombudsman Program  
West Virginia Bureau of Senior Services  
1900 Kanawha Boulevard East  
Charleston, WV 25305-0160  
(304) 558-3317  
contact person: Larry Medley, State Ombudsman

### Local / Regional Ombudsman Programs

West Central Georgia Long-Term Care Ombudsman Program  
Direct Service Corp.  
2210 Wynnton Road, P.O. Box 5801  
Columbus, GA 31906  
(706) 323-7243  
contact person: Karen Rahm, Program Coordinator

Georgia Mountains Long-Term Care Ombudsman Program  
The Legacy Link, Inc. Area Agency on Aging  
508 Oak Street, P.O. Box 2534  
(770) 538-2685  
contact person: Dianne Brookins, LTCO Coordinator

McIntosh Trail Management Services Long-Term Care Ombudsman Program  
P.O. Box 308  
Meansville, GA 30256  
(770) 567-5951  
contact person: Penny Medhurst, Local Ombudsman

## **Ombudsman Programs that Use Volunteer Consultants**

### Local / Regional Ombudsman Programs

Heart of Georgia Long-Term Care Ombudsman Program  
Heart of Georgia Community Action Council, Inc.  
213 Pine Street, P.O. Box 398  
Eastman, GA 31023  
(478) 374-4301  
contact person: Dorothy Middleton, LTCO Coordinator

Nursing Home Ombudsman Agency of the Bluegrass, Inc.  
1530 Nicholasville Road  
Lexington, KY 40503  
(859) 277-9215  
contact person: Kathleen B. Gannoe, Local Ombudsman

Montgomery County Long-Term Care Ombudsman program  
Health & Human Services for Aging & Disability  
401 Hungerford Drive, 3<sup>rd</sup> Floor  
Rockville, MD 20850  
(240) 777-1065  
contact person: Vivian Omagbemi, Local Ombudsman

West Virginia Long-Term Care Ombudsman Program  
Appalachian Legal Services  
922 Quarrier Street  
Charleston, WV 25301  
(304) 343-4481  
contact person: Roy Herzbach, Local Ombudsman

## APPENDIX D

"Pledge of Confidentiality Statement"  
used by the Montgomery County, Maryland  
Long-Term Care Ombudsman Program

Aging & Disability Services  
LONG TERM CARE OMBUDSMAN PROGRAM

**PLEDGE OF CONFIDENTIALITY**

**I understand that as a volunteer with the Montgomery County Long Term Care Ombudsman Program, I will be engaged in complaint resolution on behalf of residents of nursing homes or long-term care facilities in Montgomery County.**

**I am aware that information received by me, including the identity of the complainant and communication with all involved parties is confidential. I am aware that I may also be made aware of scheduled visits by Health Facilities surveyors and this confidential information may not be shared with any individuals or organizations outside of the Ombudsman Program. Any breach of confidentiality could be considered a violation of law and subject to fines and penalties.**

**I understand that confidentiality in the Ombudsman Program is mandated by federal regulations under the Older Americans Act, and I pledge my adherence to this mandate.**

\_\_\_\_\_ **Date:** \_\_\_\_\_  
SIGNATURE

## APPENDIX E

"Volunteer Agreement"

and

"Confidentiality and Conflict of Interest Agreement"

used by the Heart of Georgia

Long-Term Care Ombudsman Program

## L TCO Program Volunteer Agreement

*We depend on our volunteers to help us maintain a presence in long term care facilities and the community and take our commitment to the volunteer program and you seriously. Through this agreement, we state our commitment to do the very best we can to make your volunteer experience here a rewarding and productive one while also summarizing your commitment to the program.*

### L TCO Program's Commitment to the Volunteer Program.

The **LTCO** program, agrees to accept the services of, and we commit to the following:

To provide adequate information, training, and assistance for the volunteer to be able to meet the

responsibilities of the position;

To ensure sufficient supervisory aid to the volunteer and to provide feedback on the volunteer's performance;

To respect the skills, dignity and individual needs of the volunteer, and to do our best to adjust to these individual requirements;

To be receptive to any comments from the volunteer regarding ways in which we might mutually better accomplish our respective tasks; and

To treat the volunteer as an equal partner with LTCO program staff, jointly responsible for completion of the program's mission.

### Volunteer's Commitment to the LTCO Volunteer Program

I, \_\_\_\_\_, agree to serve as a volunteer and commit to the following:

To perform my volunteer duties to the best of my ability;

To only act under the direct supervision of the LTCO Volunteer Coordinator or other designated staff person;



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To adhere to agency rules and procedures, including record-keeping requirements, conflict of interest policy, confidentiality requirements, and the Ombudsman Code of Ethics;

To meet time and duty commitments, or to provide adequate notice so that alternate arrangements can be made;

I agree to perform the following volunteer functions:

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### Cancellation Policy

I agree to visit to provide and I agree to commit to \_\_\_\_\_ hours a month to the L TCO Ombudsman program; \_\_\_\_\_ months of service to the LTCO Ombudsman program

*This agreement may be cancelled at any time by either party upon notice to the other party, but will expire automatically on unless renewed by both parties.*

Volunteer

Staff Ombudsman

Date

Date

# L TCO Program Confidentiality and Conflict of Interest Agreement

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## **A. Confidentiality Agreement.**

I, \_\_\_\_\_ understand that as a volunteer with the L TCO \_\_\_\_\_

program, I may at times become aware of written or spoken information that must remain confidential I agree to keep any information about L TCO cases, complaints, residents, facilities and staff

confidential and to not discuss such information outside of the LTCO office. I will not express an *I* opinion about the quality of specific long term care facilities to the public, family or friends. I have read the confidentiality section of the Official Code of Georgia § 51-8-58 concerning confidentiality and agree to abide by it.

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## **B. Conflict of Interest Disclosure Policy.**

I, \_\_\_\_\_ acknowledge that I have reviewed the LTCO Program's Conflict of Interest policy and have disclosed all potential conflicts of interest to the L TCO Program. Potential conflict of interest include, but are not limited to:

.Having a financial interest ~ employment, business association or business dealings with long term care facilities monitored by the LTCO program;

.Having a family member in a long term care facility monitored by the L TCO program; .Having direct involvement in the-licensing or certification of a long term care facility monitored by the L TCO program; or

.Providing long term care services, including the provision of personnel for long term care facilities, or the operation of programs which control access to or services for long term care facilities.

I agree to immediately disclose to the LTCO program any potential conflicts of interest that arise after the date of this document.

By placing my signature on this document, I agree to abide by the Confidentiality Agreement and Conflict of Interest Disclosure policy.

Volunteer's Signature

Date