

**Greater WI Agency on Aging Resources,
Inc.**

**See a Need Take the Lead (SNTL)
Cohort 1 Evaluation Report**

**Presented by SDV Network™
September 13, 2019**



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1. BACKGROUND

1.1. The SNTL Initiative

In partnership with the Greater Wisconsin Agency on Aging Resources (GWAAR) the See a Need, Take the Lead (SNTL) initiative supports agencies to improve their administration and delivery of aging programs in local communities. GWAAR provides funding for technical expertise through the Self Directed Volunteer Network (SDV Network™) for agencies to implement a model of volunteer engagement that empowers older adult volunteers to address issues in their communities.

The initiative is underpinned by utilization of a structured evidence-informed Self Directed Volunteer Team (SDV Team) approach whereby agencies identify outstanding issues to be addressed and teams of older adults formulate and implement projects to address those issues. Agencies achieve their aging program goals, communities are enhanced, and volunteers derive significant personal outcomes from the experience.

The long-term intent of the SNTL initiative is to replicate the learnings from utilization of SDV Teams to address important needs and improve the wellbeing of older adults across the GWAAR network, and beyond.

1.2. SNTL Goals:

Goals of See a Need, Take the Lead:

- Implement projects addressing older adult related issues in the local community
- Engage volunteers of all ages for multi-generational involvement
- Work in, partner with, and convene the broader community and other organizations to address challenges in the local community
- Gather data and track outcomes to promote program sustainability and measure program effectiveness.
- Create opportunities for older adults to give back through using their skills in volunteering
- Increase agency capacity & effectiveness of volunteer engagement
- Expand services to older adults using volunteers

1.3. Theory of Change

The theory of change or logic model for the SNTL initiative illustrates how and why the initiative is expected to achieve its goals. It identifies the components and activities of the initiative and charts the path for agencies to engage volunteers to make long term and sustainable impact in addressing the needs of older adults in their communities.



Greater Wisconsin Agency on Aging Resources
 See a Need Take the Lead (SNTL)
 Theory of Change

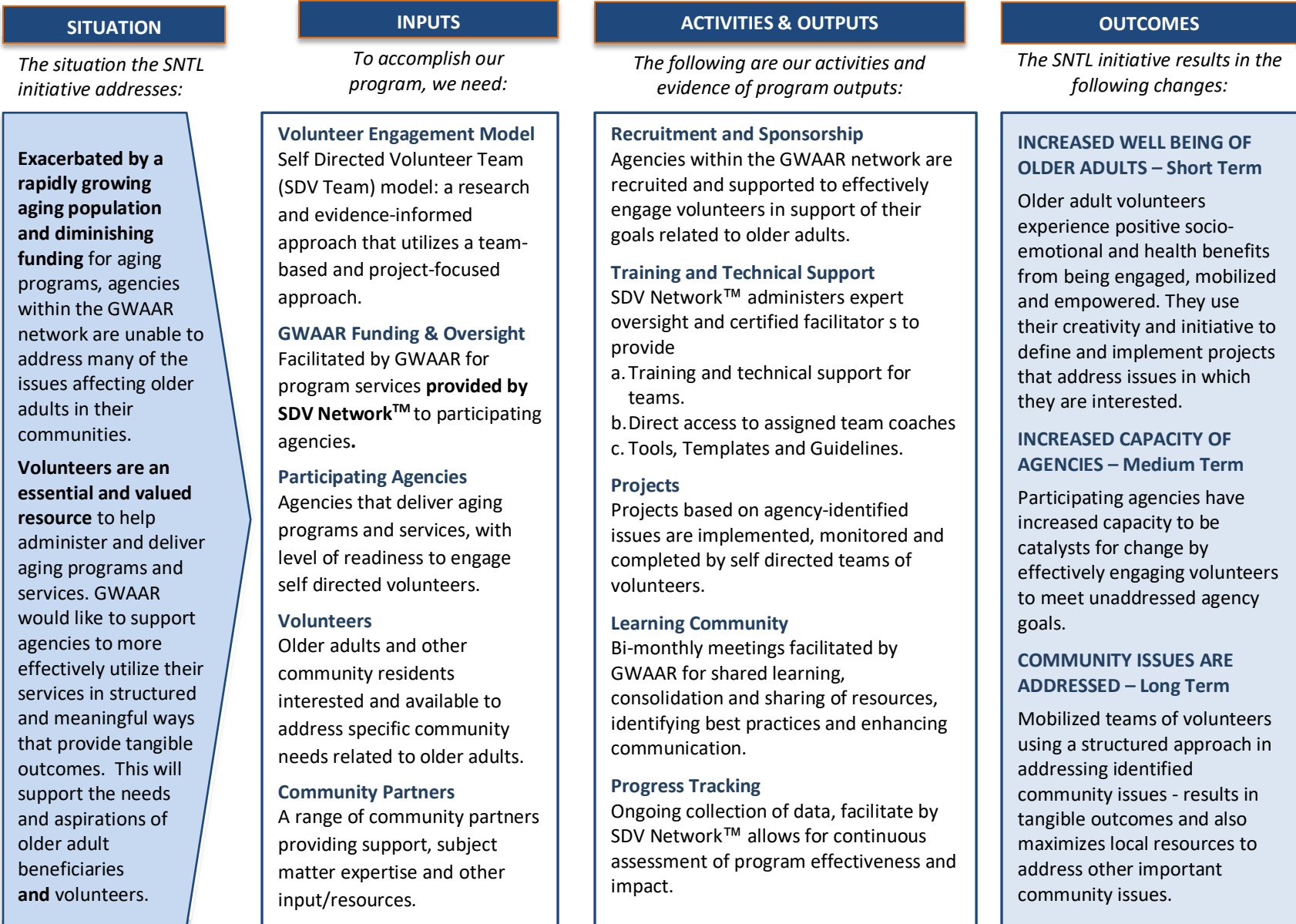


Figure 1: GWAAR Theory of Change

1.4. Participating Agencies

Using an RFP process, the following agencies working with or providing services for older adults and/or caregivers were selected by GWAAR to participate in Cohort 1 of the SNTL initiative.

- ADRC Barron, Rusk, Washburn - Barron, WI
- Lakeland Retirements Foundation - Woodruff, WI
- New Beginnings Are Possible - Milwaukee, WI
- Tomahawk Area Interfaith Volunteers, Inc. - Tomahawk, WI
- Volunteer Fox Cities - Appleton, WI

The following agency joined the initiative six months after the start, on invitation from GWAAR,

- United Way RSVP of Marathon County - Wausau, WI

2. EVALUATION PURPOSE & DESIGN

2.1. Purpose

The overall purpose of this evaluation is to assess the effectiveness of the Cohort 1 experience, and to identify lessons learned for more effective implementation of Cohort 2.

2.2. Evaluation Questions

Evaluation questions relevant to the SNTL initiative were developed to focus the evaluation on aspects of the initiative that are critical for credibility, impact and sustainability. Five main questions were addressed:

a. Initiative Implementation

- What was the quality and effectiveness of the program's content/design?
- To what degree did the teams successfully implement the SDV Team process?
- How applicable was the process design for the SNTL initiative?

b. Initiative Outcomes and Impact:

- To what degree did the SNTL initiative impact the participating agencies, volunteers and their local communities?

c. Key Learnings

- What were the barriers and enablers that influenced implementation and outcomes during the Cohort 1 experience?

d. Value

- To what degree did the SNTL initiative meet the GWAAR goals?
- What is the value or worth of the SNTL initiative considering the investment made by GWAAR?
- How strong is the program's sustainability? Can it grow in the future with limited additional resources?

2.3. Sources of Information for the Evaluation

The following table illustrates, in no particular order, the sources of information utilized for this evaluation along with the rationale for their selection. The effectiveness and reliability of each of these sources of information is addressed in **Section 4** of this report.

In addition to observations made by SDV Network™, both formal and informal input from volunteers and agency staff is also represented.

Tool/Resource	Purpose/Rationale
Readiness Assessment	<ul style="list-style-type: none"> Assess the disposition of the participating agency towards successful engagement of self directed teams of volunteers.
Quarterly Progress Tracker <i>Self-reporting by teams every 3 months</i>	<ul style="list-style-type: none"> Capture data on each program to assess progress and achievement of outcomes Capture data on the no. of volunteers age 55+ recruited; volunteer attrition;
Site Visits <i>Conducted by SDV Network coaches</i>	<ul style="list-style-type: none"> On-site assessment of team process and progress Capture direct information from local program stakeholders Fidelity assessment for SDV Team process Identify self-reporting issues for quarterly survey design
Bi-Monthly group calls <i>Facilitated by GWAAR</i>	<ul style="list-style-type: none"> Collaborative problem solving and shared learning Opportunity to capture noteworthy practices & lessons learned Indication of grantee participation, collaboration and engagement
Dropbox <i>Facilitated by SDV Network</i>	<ul style="list-style-type: none"> Assess volunteer use and access to repository of tools and templates
Project Completion Interviews <i>Conducted by SDV Network</i>	<ul style="list-style-type: none"> Capture personal perspectives on SNTL process and projects directly from team members
Team Coaching <i>Feedback from SDV Network coaches</i>	<ul style="list-style-type: none"> Assess progress and achievement of local outcomes Discuss site-specific issues
Evidence Base Practice Research Dr Manoj Pardasani	<ul style="list-style-type: none"> Pre and post participation interviews of volunteers. <p><i>This information is pending release and publication after Cohort 2 concludes.</i></p>

Table 1: Sources of Information for Evaluation

3. OUTCOME & IMPACT FINDINGS

3.1. Age of Volunteers

Volunteers participating in the initiative were **overwhelmingly over age 60 years**. In this regard, the SNTL goal to create opportunities for older adults to give back through using their skills in volunteering was achieved.

Recommendation: Further segmentation within the age groups categories should be considered for Cohort 2 in order to get a more detailed view of the SNTL volunteer demographic.

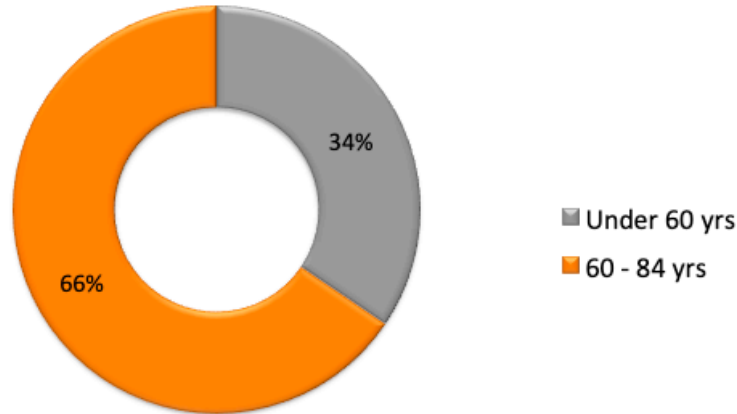


Figure 2: Age distribution of SNTL volunteers

3.2. Numbers of Volunteers

A total of **36 volunteers joined** the participating teams and 5 left during the 12-month period of the Cohort 1 experience. This does not include the Key Staff Persons. Teams ranged in number from 2 to 8 members at any one time.

There were no targets set for numbers of SNTL volunteers.

3.3. Community Partners

A total of 42 community partners were actively engaged during Cohort 1 of the SNTL initiative. Resources provided by community partners ranged widely and included subject matter expertise, volunteer facilitation of EBPs, and goods, services and facilities to support projects. One team applied for and received a small grant from a community partner to support their project. Recommendations on community partnerships are addressed in section 4 of this report.

3.4. Issues Addressed

The following chart represents a range of project-related issue categories identified by participating teams. Teams selected one or more categories directly relevant to their projects from a list provided by SDV Network™.

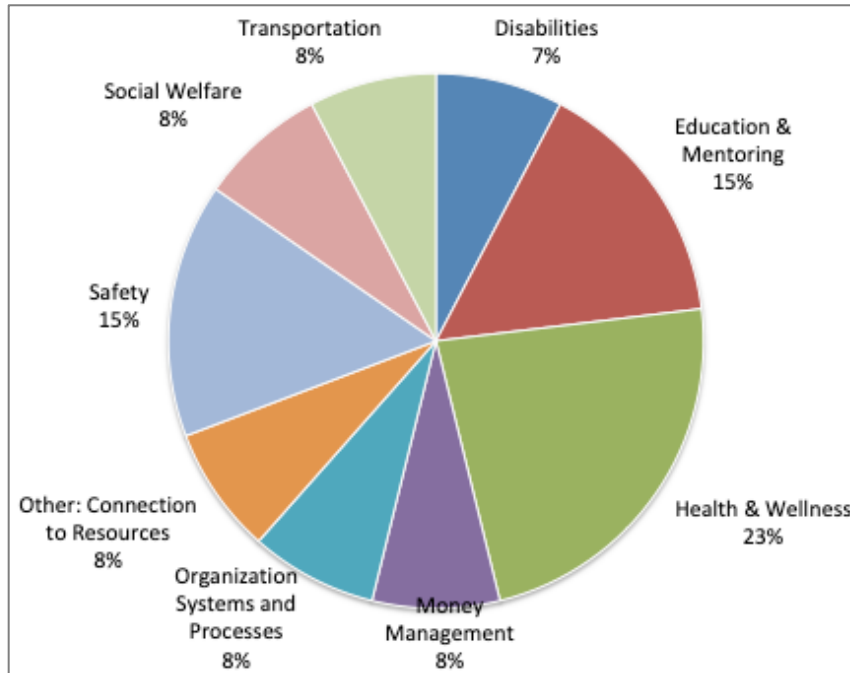


Figure 3: Categories of issues affecting older adults addressed by SNTL teams

Three of the six agencies implemented aging mastery related projects, and this is reflected in the relatively high percentages of ‘Health & Wellness’ and ‘Education & Mastery’ categories. Over time, this information is important for GWAAR to track the areas of most interest for agencies, to monitor specific areas of impact in the community, and to explore opportunities in areas that may be underserved.

3.5. Cohort 1 Projects

Project	Overview	Output	Outcomes
Health Promotion Coordination (ADRC Barron, Rusk & Washburn)	Project goal was to expand and sustain the delivery of evidence based and evidence informed health promotion programs for healthy aging in communities of Barron County.	<ul style="list-style-type: none"> Updated obsolete database of health promotion program leaders, guest experts for Stepping on and Aging Mastery and community partners Developed manuals/toolkits for volunteer leaders Recruited volunteer program leaders, guest experts and ambassadors 	Hosted 3 events and transitioned project into a core program offering for ADRC Barron, Rusk & Washburn Project beneficiaries include: <ul style="list-style-type: none"> Health Promotion Coordinator for Barron, Rusk & Washburn Counties Older adult participants in Health Promotion programs Health Promotion program leaders Community partners

Evidence Based Practice Programs for Local Community (Lakeland Retirement Foundation)	Triggered by a report from Aspirus, the project focused on consolidating resources and information to position LRF for EBP delivery. EBPs are available just outside Woodruff, but more locally based programs are necessary for increased participation in the community.	Team researched, catalogued, organized, and recruited resources for EBP programs in the Woodruff area.	<ul style="list-style-type: none"> • Five EBP events were successfully hosted in three outlying communities • Project transitioned to Generations for further replication of EBP events – including handover of catalogue, database and resource lists
Bowling League (Lakeland Retirement Foundation)	Designed, organized and facilitated a bowling league for older adults in the Minocqua area. Project aimed to address lack of services in local community during winter months when older adults tend to be more isolated and sedentary.	League design, goody bags, prizes and transportation assistance provided by team and community partners engaged by team.	League ran as planned from February to April 2019. Potential for annual event – all planning materials including interested donors, community partners, flyers, local radio and TV promos, etc. handed over to the agency.
Fundraising for Community Center (Lakeland Retirement Foundation)	Embarked on new (third) project to expedite return of older adult program activities lost when the LRF community center building burnt down in 2015.	Guided by a community needs analysis survey conducted in 2017, team worked on developing three new programs and to support LRF fundraising for the new center.	This project did not continue after the KSP left the agency.
Intentional Neighbors (Volunteer Fox Cities)	Conducted ‘community conversations’ and local research on issue of older adult loneliness in Appleton, including services available and why older adults are NOT utilizing available services.	Written report cataloging services available, service gaps and recommendations for improving usage of services.	New resource for Volunteer Fox Cities’ programs. Report immediately transitioned for use by ‘WI Partners’ outreach to older adults in Heart of the Valley communities.
Healthy Aging Promotion (United Way RSVP Marathon County)	Embraced a broad mandate to develop strategies and community outreach initiatives for older adults to access information, programs, and support in Wausau. Main focus is to engage community stakeholders and beneficiaries of their programs to become ambassadors for downstream dissemination of information to older adults in their own personal networks.	Specific details are pending: Team is currently working on its first Progress Tracker input. This process will help to provide more detailed information and clarification of team outputs and distinct ‘projects’ for the purpose of SNTL monitoring.	Team has successfully reached and impacted hundreds of older adults through various ‘programs’ including: <ul style="list-style-type: none"> • ‘Senior Sunday Project’ • ‘Don’t Just Retire, Re-fire’ • Community presentations on healthy aging concepts • Distribution of information on Senior Independent Living Support Services <i>Note: These projects were initiated prior to joining SNTL.</i>

Table 2: Summary of Cohort 1 projects

3.6. Impact of Initiative on Stakeholders

The information for this section is consolidated from the quarterly Progress Tracker submission made by the teams over 12-months, with teams reporting at the end of each 3 month period. Participants were asked, “To what degree have the following groups benefited from your team’s work during this reporting period, using a scale of 0 (not at all) to 5 (high)?”

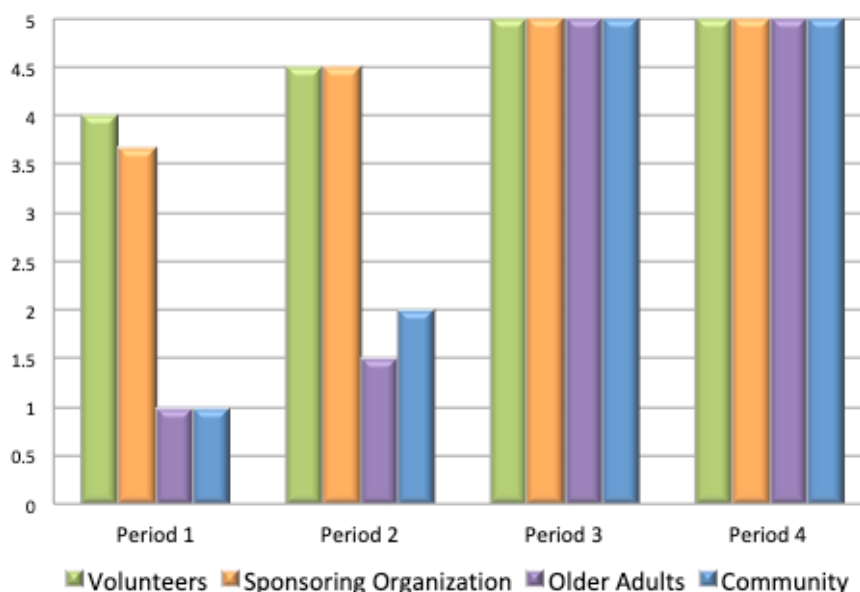


Figure 4: Impact of the initiative on different stakeholder groups over time

In keeping with the initiative goals, impact on volunteers, participating agencies, local communities and was assessed. In addition to being inferred, GWAAR requested that impact on older adults be specifically assessed. Table 3 below outlines the impact on these different stakeholder groups.

Stakeholders	Impact Progress	Impact Statements
Impact on Volunteers	After 3 months into the initiative when the first Progress Tracker submissions were made, there was strong consensus that volunteers experienced a high level of benefit from participating in the initiative.	<p><i>“We are a very friendly and cohesive group. We tap into each other’s talents and share the responsibilities of launching the bowling group. We enjoy each other!”</i></p> <p><i>“Volunteers are empowered to voice their perspectives on the issue and decide how they would like to be involved.”</i></p>
Impact on Sponsoring Organization (Agency)	Volunteers had a strong sense that they were accomplishing work that the agencies were not able to do themselves. This is no surprise as the Key Staff Persons who were agency staff provided the issue briefs based off which the teams formulated their projects.	<p><i>“Staff would not have been able to address the goals in a timely manner due to all of the other responsibilities she has which results in a lack of time needed for the health promotion programs goals.”</i></p> <p><i>“We are developing a way to better connect people over age 55 & desiring to help others/ receive help; making a plan for building community volunteerism.”</i></p>

		<i>“The self-directed volunteers has enabled the ADRC to meet their Aging Plan goals for successful Health Promotion Workshops in the second quarter.”</i>
Impact on older adults	Other than the fact that some of the volunteers were older adults themselves, at the early stages of the initiative, the projects were being formulated and planned. As such there was little impact on the older adult beneficiaries. As indicated in Figure 4, this increased significantly by the ninth month of the initiative (Period 3) when about half the total projects had been completed.	<p>Comment during period 1: <i>“We are just starting the part of our project that will actually show benefit to older adults in the community, by intentionally including them in conversations about their lives.”</i></p> <p>Comment during period 4: <i>“In this quarter 35 older adults enrolled in Health Promotion Workshops in Barron County”. {... there were none at the beginning of the initiative }.</i></p>
Impact on the community	Similar to the impact on older adults, and for the same reasons, impact on the community had a slow start and increased significantly towards the end of the Cohort 1 experience.	<i>“Strength and balance improved for adults attending Stepping On. The value of social engagement is priceless. The Aging Mastery Program was reestablished after a one year hiatus. Sixteen adults currently enrolled and are benefiting from the community engagements, financial fitness, exercise, sleep, and healthy relationships and other topic covered.”</i>

Table 3: Impact of on SNTL Stakeholder Groups

The evaluation process is designed to measure outcomes and impact directly attributable to the SNTL initiative. To this end, the measurements above indicate that the overall goals of the SNTL initiative as outlined in Section 1.2 above were successfully achieved in the agencies that participated.

It is important to note that the self-reporting aspect of the measurement tool means that the information provided can be subjective. So, while volunteers can convey how much they personally benefit from being part of the initiative, other impressions may need further validation in the long run.

4. IMPLEMENTATION FINDINGS

This section of the evaluation examines the processes and operations that make up the SNTL initiative. It is not an examination of impacts but is specifically intended to assess what worked, and explore potential modifications that can enhance the effectiveness, value and sustainability of the SNTL initiative.

To provide context for this section, the following is a summary review of the Cohort 1 participating agencies. The green code represents those that met and/or exceeded SNTL expectations for participation and results. The yellow code represents success, but with opportunities to improve. The red code represents agencies that ultimately did not participate in the initiative.

Agency	Cohort 1 Participation
ADRC Barron, Rusk, Washburn	<p>An exemplary, consistent and effective team. They set themselves a challenging project and were able to complete it successfully - the project is featured in a case study attached to this report.</p> <p><i>Potential for inclusion in Cohort 2.</i></p>
Lakeland Retirement Foundation	<p>An exemplary, consistent and effective team. They completed two projects and initiated a third before the KSP and Executive Director left the organization.</p> <p><i>Potential for inclusion in Cohort 2.</i></p>
United Way RSVP of Marathon County	<p>This team joined as an add-on to the initiative and hit the ground running. The TF previously received SDV Team training in a prior work position and was able to help the team quickly assimilate to the SNTL process. The team currently has 3 projects running concurrently.</p> <p><i>Will participate in Cohort 2.</i></p>
Volunteer Fox Cities	<p>This agency successfully completed one project. There were lessons learned in ensuring that the team stays in alignment with the agency's Issue Brief.</p> <p><i>Potential for inclusion in Cohort 2.</i></p>
New Beginnings Are Possible	<p>Internal organizational issues overrode potential participation.</p>
Tomahawk Area Interfaith Volunteers, Inc.	<p>Paradoxically, these agencies would likely have benefitted the most from the SNTL initiative, but emerging issues and competing priorities resulted in their inability to engage.</p>

Table 4: Summary review of Cohort 1 participating agencies

For more detailed implementation findings please contact Carrie Diamond - Carrie.Diamond@gwaar.org

5. VALUE

When assessing the value of an initiative, it is important to examine how valuable it is in terms of knowledge and experience gained and how applicable and useful this may be in the long term.

- The SNTL initiative has provided a demonstrable pathway towards addressing the dire need for agencies to accomplish outstanding work within their strategic focus in communities where older adults are underserved.
- All participating teams produced credible project outcomes, all of which are currently being utilized, or have set the stage for more expansive benefits to older adults in their communities. Project materials, databases and information developed across the participating agencies are accessible for future teams.
- The five-plus projects accomplished lay the groundwork for GWAAR to begin to identify and leverage its role in assisting agencies within its network to effectively improve their capacity by engaging volunteers
- Notwithstanding the Cohort 1 challenges, important lessons were learned about agency recruitment. These are being put in place for Cohort 2.
- Value is attributed to the many volunteers, agencies, community partners, and other stakeholders involved in Cohort 1 not only for their time, resources and work, but also for their potential evangelism.
- GWAAR has already invested in establishing the SNTL initiative, its components, and lessons learned from Cohort 1. There is less to do in the next phase to take the initiative to scale.

6. CONCLUSIONS

- a. The investment made by GWAAR in SNTL has yielded results that demonstrate the effectiveness of the SDV Team process. The initiative achieved its short term goals and established a structured process to identify and address issues to allow agencies the opportunity to increase their capacity to address the needs of older adults.
- b. The most significant limitation of the Cohort 1 experience was critical mass – ultimately just 4 agencies actively participated. In this regard, the evaluation results demonstrate a beta or pilot of the SNTL initiative. To move the initiative to scale, at least 8 to 10 actively participating agencies will be necessary so that the initiative becomes self-sustaining and creates further growth.
- c. The initiative as implemented does what it is intended to do for participants, their agencies and their local communities. It is in the nature of any social initiative that eventualities can be anticipated. However, it is important to ensure that process modifications are put in place to mitigate and respond quickly to unanticipated occurrences during the life of the initiative. Process adjustment identified in this evaluation will be in place for Cohort 2.