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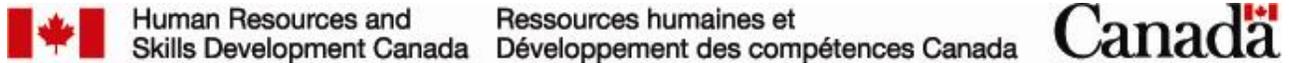
**Starting a *Seniors Reaching Out to Seniors* Workshop Program**

**A Toolkit for Local Agencies**

# Starting a *Seniors Reaching Out to Seniors* Workshop Program

## Acknowledgements

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These materials were developed by the BC Centre for Elder Advocacy and Support in partnership with the Canadian Centre for Elder Law. The BC Centre for Elder Advocacy and Support provided overall management and direction for this project.

We thank the contractors, staff and volunteers who worked long and hard on this project. Your insights, expertise and assistance were invaluable. We also thank the Canadian Centre for Elder Law and the BC Law Institute who were contracted to develop this workshop and did an exemplary job. Workshop development included extensive focus testing at community centres and agencies throughout the Lower Mainland of Greater Vancouver. Evaluative process was emphasized throughout and multiple revisions were a result. We also thank Alana Prochuk who coordinated the Seniors Advisory Committee and provided expertise and creativity throughout the project.

## Toolkit Contents

This toolkit includes all the necessary components for local community agencies to create a volunteer-driven seniors program enabling seniors to reach out to other seniors about elder abuse.

This toolkit is comprised of the following:

- Starting a *Seniors Reaching Out to Seniors* Workshop Program: A Toolkit for Local Agencies (Project Report: Summary, Methodology & Outcomes)
  
- *Protect Yourself!* Financial Literacy Workshop for Older Adults
  - Train-the-Trainer Guide (including accompanying PowerPoints)
  - Workshop Facilitator Guide
  - *Protect Yourself!* Module 1 PowerPoint Presentation
  - *Protect Yourself!* Module 2 PowerPoint Presentation
  
- *Building Community Connections* Workshop for Older Adults
  - Train-the-Trainer Guide (including accompanying PowerPoints)
  - Workshop Facilitator Guide
  - *Building Community Connections* PowerPoint Presentation
  - *Finding a Future for Ellen* DVD

## Project Overview

The toolkit is the culmination of a three-year project in which a comprehensive elder abuse awareness training and mentorship program was developed. Senior volunteers were actively involved in all phases of this project, including: establishment of a Seniors Advisory Committee; development of new materials; extensive focus-testing of workshop materials at seniors' groups and local agencies with delivery of materials provided by the senior volunteers.

During the first phase of the project, existing financial abuse prevention workshop materials were updated and a curriculum for the new *Building Community Connections* workshop was developed and revised. The updated *Protect Yourself! Financial Literacy Workshops* and the newly developed *Building Community Connections Workshop* were extensively focus tested by members of the Seniors Advisory Committee who presented the workshops to seniors groups and community agencies throughout the Greater Vancouver area. During the three year project, BC CEAS staff and volunteers presented 82 workshops at 48 different venues to more than 1500 older adult workshop participants. The workshops were modified as needed, based on surveys completed by attendees at the workshops and the feedback from the Seniors Advisory Committee.

In the second phase of the project, *Train-the-Trainer Guides* were developed and focus tested. Representatives from senior serving agencies from six regions around the province were trained using the Train-the-Trainer curriculum. Course content focused on teaching the representatives how to facilitate the workshops and how to teach others to do the same. Feedback and evaluative materials from this weeklong session were used to modify the content. The lessons learned during this process were incorporated into the final versions of the *Train-the-Trainer Guides*.

Agencies who order this toolkit will have the option of receiving additional support from BC CEAS. Agencies and organizations around the province who wish to start a *Seniors Reaching Out to Seniors Workshop Program* and would like support while implementing the program can choose to participate in periodic

“volunteer professional development” conference calls and can contract trainers from BC CEAS.

# Project Summary

## Background

The BC Centre for Elder Advocacy and Support's (BC CEAS) primary purpose is to develop and deliver programs and initiatives that work to end or prevent elder abuse, and to educate the public about abuse. BC CEAS has been successfully providing services throughout the province of BC since 1994. BC CEAS engages in community-building, outreach, education, peer-to-peer support, training, tool-creation and the support of multi-disciplinary teams, and remains grounded in grass-roots elder abuse prevention efforts. Our services include Education and Outreach programs, the Seniors Advocacy and Information Line, Victims Services Program, Legal Advocacy Program, and the Elder Law Clinic. Through our programs and services we advocate for legal and social justice for older adults. We believe that older adults have the right to live with dignity, safe from abuse of any kind.

### A Demonstrated Need

Elder abuse is a pressing problem in our society. Some examples of statistics from previous research studies include the following:

- 1 out of 12 (or 8%) of seniors in B.C. have been financially abused (abuses which fell under civil laws or the *Criminal Code*) in amounts that averaged over \$20,000.
- According to a national telephone survey, at least 4% of older Canadians living in private dwellings (over 5% in B.C.) suffered from one or more serious forms of abuse at the hands of a spouse, relative or other close contact.
- In 1999, Statistics Canada asked 4000 older Canadians a series of eight questions about emotional and financial abuse occurring during the past five years. Approximately 1% of seniors reported experiencing some form of physical abuse and 8% of seniors reported some form of emotional or financial abuse.

Despite existing information and programs dealing with elder abuse, the problem persists. New approaches and means of intervention and prevention are needed.

## **Project Rationale**

The purpose of the project is to reduce elder abuse and raise awareness and skill levels of seniors and seniors-serving agencies by developing materials that provide older adults with information that enables them to protect themselves from financial and other forms of elder abuse. Previous research strongly suggested that seniors are more likely to respond positively to information presented by their peers. For this reason, a peer to peer approach is emphasized in the *Seniors Reaching Out to Seniors Workshop Program*.

## **Process**

The workshop content was developed in collaboration with the Canadian Centre on Elder Law (CCEL). The workshop exercises and elder-friendly delivery methods were created with the support and assistance of a Seniors Advisory Committee. The committee was made up of 30 older adult volunteers with diverse backgrounds that included retired nurses, retired counsellors, a retired RCMP official, a residential care aid, community volunteers, technical writers, university research assistants, community program outreach workers and senior peer counsellors. The ages of the volunteers on the Seniors Advisory Committee ranged from 55 to 90 years.

Key achievements of the Seniors Advisory Committee included:

- Providing feedback on the feasibility and usefulness of the interactive activities planned for the workshops
- Making recommendations about language to be used in the workshop to improve clarity, inclusiveness and relevance to older adults

- Recommending strategies to help more workshop attendees feel comfortable participating
- Recommending useful approaches for facilitators to deal with challenging situations in workshops
- Revising the evaluation forms for the workshops to improve their clarity and user-friendliness
- Brainstorming strategies to make workshops accessible to adults whose first language is not English
- Developing recommendations for the training of volunteer facilitators
- Developing an initial outline of the procedure for volunteers to sign up for, deliver, and report back on workshops
- Signing up to observe workshops as an initial stage in training
- Listing types of support that volunteer facilitators would require

The consultation process also included feedback from workshop participants and seniors-serving organizations. At the end of each workshop, questionnaires were completed by workshop participants and seniors programmers, providing input on the content and facilitation methods used. The curriculum developer studied the contents of the evaluations before finalizing the selection of workshop topics and activities.

### ***Protect Yourself! Financial Literacy Workshops – Methodology***

The methodology employed is based on grounded research: researchers from BC CEAS and CCEL worked with seniors in testing-ground “living laboratory” workshops to learn what information seniors wanted to have and what their financial literacy needs were. The findings showed that nearly all the more mainstream financial literacy materials were either inappropriate for seniors, irrelevant for seniors, or indeed in some cases actually offensive to seniors. As one early participant in his 80s noted to the research team, “telling me to save for my retirement is a little beside the point, now isn’t it?” It was clear that BC

seniors wanted information about legal issues, how to protect themselves from financial abuse, and how to become empowered to learn more about how to manage and control their money and other assets. Only through working closely with older adults in this grounded-research methodology were clear areas of need properly identified. This project is ‘seniors-directed’ and employs a ‘seniors-centered’ approach. Senior participants indicated often that this was the first time anyone really asked them what they thought was important. This project was a marked departure from other “top-down” financial literacy initiatives.

### ***Protect Yourself! Financial Literacy Workshops – Outcomes***

The subject of the workshops, delivered by seniors to seniors, is financial literacy and financial abuse of older adults. The goal of the workshops is to provide older adults with information that will help them to protect themselves from financial abuse. “Financial literacy” means having the knowledge to prevent, recognize and respond to financial abuse.

*Protect Yourself!* Financial Literacy is composed of two workshops:

#### **Module 1: Powers of Attorney & Joint Accounts**

Powers of attorney are legal documents that an adult with mental capacity can create to give another person the power to make all or some of their financial decisions. Some people designate a power of attorney to make decisions on their behalf if they become unable to make their own decisions. Knowing about powers of attorney allows people to choose who will be their substitute decision-maker. Although powers of attorney are an important means of protecting financial interests, they can also be misused or abused. For this reason, it is important to select someone who will respect the wishes of the individual. We discuss powers of attorney and shared (often called “joint”) bank accounts at the same workshop because they are both tools that are commonly used to plan in advance and to protect finances.

*Protect Yourself!* Module 1 should help participants to:

- Understand the different kinds of powers of attorney and how they can be used

- Recognize signs of misuse of power of attorney
- Choose their power of attorney wisely
- Understand how a joint bank account works
- Identify resources for assistance if they suspect financial abuse or misuse

### Module 2: Frauds, Scams & Telemarketing

Isolation and disability can make older adults particularly vulnerable to frauds and scams. Identity theft is also a significant risk, as changes in technology have increased the prevalence of this type of crime. Scams, frauds and identity theft can have serious financial and personal consequences.

*Protect Yourself!* Module 2 should help participants to:

- Identify frauds and scams in their lives
- Understand the significance of identity theft
- Protect themselves from identify theft
- Reduce unwanted telemarketing
- Respond to financial abuse when it occurs

While both modules discuss financial abuse, the focus of the material is different. Module 1 looks mainly at abuse perpetrated by family members, friends and caregivers. Module 2 concentrates on consumer frauds and scams, which tend to be perpetrated by strangers. Another difference is that Module 1 is about advance financial planning, whereas Module 2 is about becoming “street smart” to avoid frauds and scams.

### ***Building Community Connections Workshop – Methodology***

The same grounded research methodology used in the development of the *Protect Yourself! Financial Literacy* workshops was employed during the development phase of the *Building Community Connections* workshops. Prior to this project, elder abuse awareness materials mainly consisted of written material that could be handed out, or videos that could be watched by seniors. As well, there was existing workshop curricula that could be delivered by professionals to seniors. However, there was limited workshop curricula specifically designed for delivery by seniors or by volunteers. Consultation with older adults on the

development of our new educational materials was a major focus. The title, "Building Community Connections... To Help Stop Mistreatment and Neglect of Older Adults," was chosen to reflect the key words and themes that were identified as meaningful by older adults within our organization and the larger community. After each testing-ground workshop, adjustments were made to the sequence of activities, the facilitation approach, the presentation content, the discussion questions and the speaking notes. These revisions were informed by participant feedback, both written and oral, and by the reflections of staff facilitators and observers, which were recorded and discussed after each workshop. Revisions focused on framing the "Finding a Future for Ellen" video to promote productive discussion while respecting participants' emotional needs; capturing the types of mistreatment that participants saw as most common; expanding the Resource List to include additional sources of help for older adults; ensuring dynamic pacing and frequent opportunities for interaction; and improving opportunities for meaningful participant feedback. The theme of social connection as a means of reducing the risk of elder abuse appealed strongly to the older adults whose guidance we sought. We have highlighted this theme throughout the new workshop and hope that our emphasis on community-based support will bring an empowering note to the difficult topic of elder abuse.

### ***Building Community Connections Workshop – Outcomes***

The subject of the workshop, delivered by seniors to seniors, emphasizes the community's role in combatting isolation and reducing the risk of abuse in order to empower workshop participants and make the topic more accessible. This 90-minute session can be presented to groups of older adults in any community setting.

The *Building Community Connections* workshop includes:

- A presentation on types of mistreatment
- Brainstorming about local community resources
- Discussion of a video showing a fictional story of isolation and elder abuse
- Strategies for staying connected
- Identifying resources for assistance

### **Train-the-Trainer Guides - Methodology**

Train-the-Trainer Guides were written for both workshop programs in the *Seniors Reaching Out to Seniors* Project. The content and organization of both Train-the-Trainer Guides were informed by volunteer feedback collected at training sessions, at Seniors Advisory Committee meetings, and through phone and email consultations. At Seniors Advisory Committee meetings, volunteers were asked which skills they felt were most important for workshop facilitators to acquire and which types of training could help them develop these skills. Volunteers' responses to these questions were foundational for the development of training activities, particularly for the *Building Community Connections* workshop program, which requires presenters to have significant skill in active listening and group facilitation, and a high level of responsiveness to participants' needs. Volunteers were also asked for input on the layout and organization of the material in the Train-the-Trainer Guides and the activities and information included. Specific additions to the Train-the-Trainer Guides which were made as a result of volunteer input included energizing memory refreshers, an activity on the principles of adult learning, discussion of diverse communication and learning styles, and interactive activities focusing on active listening, reframing participant comments and managing challenging group dynamics.

### **Train-the-Trainer Guides - Outcomes**

The Train-the-Trainer Guides will prepare agency staff to train volunteers to deliver *Protect Yourself! Financial Literacy* workshops and the *Building Community Connections* workshop. It provides tips about how to recruit, supervise and support volunteers; plan workshops in your community; and build strong partnerships with seniors-serving organizations.

Each Train-the-Trainer Guide contains over 200 pages of resources and activities, offering trainers a wide choice of materials for volunteer skill development and many tools for program coordination and volunteer management.

Each *Train-the-Trainer Guide* includes:

- Detailed Training Outlines providing in-depth instructions for each activity

- PowerPoint presentations needed for training
- Volunteer training packages including activities on:
  - Public Speaking
  - Working with PowerPoint and video equipment
  - Strategies for managing group dynamics
  - Strategies for dealing with challenging scenarios
  - Considering participant needs
  - Working with interpreters
  - Practice workshop facilitation
  - Planning with co-facilitators
  - Reflective practice and self-evaluation
  
- Workshop coordinator resources including:
  - Tips on program coordination and volunteer management
  - Sample workshop procedures
  - Workshop poster templates
  - Sample workshop booking spreadsheet
  - Facilitator tracking form
  - Facilitator self-evaluation forms

### ***Seniors Reaching Out to Seniors Workshop Project Outcomes***

The biggest challenge in this project was to develop suitable workshop materials that could be comfortably taught by volunteer seniors from various backgrounds. Content of a volunteer-driven workshop program on elder abuse must strike the right balance so that it educates older adults who attend the workshops, yet can be delivered in such a way that it does not elicit questions that require special expertise in legal or financial matters. Through extensive consultation with older adults, both on the Seniors Advisory Committee and in the community, we were able to achieve this goal.

The *Seniors Reaching Out to Seniors Workshop Program* project has resulted in better access to elder abuse prevention, detection and intervention tools for

seniors and seniors-serving organizations. There has been significant collaboration among stakeholders in the field of elder abuse prevention as demonstrated by the many seniors' agencies and community groups who worked with us to host the workshops and assisted us by providing feedback during this project. Seniors throughout British Columbia, including those who are isolated and vulnerable, will continue to be empowered as more *Seniors Reaching Out to Seniors* Programs emerge at the local level.