HEART TO HEART VOLUNTEER PROGRAM IMPLEMENTATION GUIDE

CREATED BY NHAT HOANG OTS, KIYOMI KURODA OTS, VICTORIA RAMIA OTS, & KELSY WALLACE OTS

Dominican University of California
MSOT Graduate Program
We would like to extend an immense gratitude to Dr. Gina Tucker-Roghi for guiding us through the creation of this program. We could not have done this without your constant support!

We would like to acknowledge JB Chua, Cason Bush, and all the staff at Summerfield Healthcare Center in Santa Rosa, CA for their willingness to collaborate with us, and for making possible the creation of Heart to Heart volunteer program.

Thank you to Dr. Susan Morris for providing invaluable support in the early stages of our project. We would also like to thank Tina Hand and Amanda Grace for evaluating our program for feasibility. Lastly, we would like to thank California Foundation of Occupational Therapy (CFOT) and Ensign Services, Inc. (a network of affiliated facilities who provide post-acute rehabilitation services) for selecting our project for seed grant money that made possible the development and funding of this program.

We would not have been able to do any of this without your amazing supports!

Dominican University of California
MSOT Graduate Program
Thank you for embarking on the journey of implementing this exciting program! In these pages you will find descriptions of each component of the program, followed by tools to support the actualization of each step along the way.
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The Heart to Heart volunteer program is designed to provide volunteers with foundational knowledge about behaviors, general abilities, and communication skills of individuals with dementia. The aim of this program is to promote comfort and confidence in volunteers in order for them to facilitate meaningful activities and interactions with residents with dementia.

This program is designed to consider the residents' abilities based on their specific stage of dementia in order to promote residents' optimal engagement in activities.

By tailoring each volunteer and resident interaction based on the resident's remaining abilities, this program focuses on establishing and enhancing client-centeredness at the heart of each visit. The client-centered relationship allows for a more meaningful interaction, and greater engagement for the resident.
In order to access all the training materials, please use the following URL:

https://www.dominican.edu/academics/schools/school-health-and-natural-sciences/healthy-aging

Click on the link available under "OT Services for Individuals Living in Long Term Care Communities" This will provide access to a Google Site with all program materials, including the online training modules.
SEQUENCE OF PROGRAM COORDINATION: OVERVIEW

1. Request approval for Heart to Heart volunteer program implementation with skilled nursing facility:
   a. Contact and coordinate with Summerfield Healthcare Facility.
2. Recruitment of volunteers:
   a. Contact high schools and coordinate informational sessions.
   b. Present recruitment powerpoint, and provide volunteer forms during this time.
3. In-person training Day 1:
   a. Schedule and complete one hour facility tour & day one in-person training with skilled nursing facility. Student volunteers will receive a physical handout of the pre-survey evaluation to complete before in-person training day 2.
4. Online course:
   a. Student volunteers complete three hour online training.
5. In-person training day 2:
   a. Students attend one hour in-person training day 2.
6. Volunteer visitations with residents:
   a. Begin program sessions.
   b. Program to be completed after 8 weeks.
7. Commencement celebration:
   a. Host program commencement celebration with volunteers.
   b. Provide volunteers with post-survey evaluation.
To begin...

First establish a program facilitator, such as the Activity Director at the skilled nursing facility. Then identify the requirements of conducting volunteer program from the facility, including HIPAA acknowledgements, and volunteer consent forms.

Create a timeline that includes:

- Program information sessions at high schools for volunteer recruitment
- Program training days
- Program start and end dates
- Hours of the day and days of the week which the volunteers will be at the facility
Who is the target volunteer population?
High school juniors and seniors interested in volunteer opportunities.

Who to contact for recruitment?
Local high school career counselors.

Presentation/Info session for volunteers
- Host a 15-minute Powerpoint informational session to the high school students, including an overview of the Heart to Heart volunteer program (see page #).
- Provide students with a flyer about the program. Allow interested students to sign up for the program and complete a student contact form prior to leaving the informational session.
- Distribute a consent form for students to take home to complete for collection at the first in-person training session.
ATTENTION:
HIGH SCHOOL
JUNIORS AND SENIORS!
ARE YOU LOOKING FOR A
VOLUNTEER OPPORTUNITY?

COME LEARN ABOUT

HEART TO HEART
VOLUNTEER
PROGRAM

A training program for high school students to learn about dementia, and provide meaningful visits with individuals living with dementia in a skilled nursing facility.

Get involved at [Name of Skilled Nursing Facility]!

Come immerse yourself in a unique learning experience!

For more information email: heart2heartprogram2020@gmail.com
Heart to Heart
Volunteer Training Program

Presented by:
[Name of Presenter; Name of Skilled Nursing Facility]

Today's Presentation

MAIN TOPICS

- Who are we and why are we here?
- What is Heart to Heart?
- Why is this program important?
- Why we need you?
Who Are We? What Do We Do?

[Name of Skilled Nursing Facility]

- Skilled services at local skilled nursing facility
- Promote meaningful interactions, enhance daily routines
- Collaboration with various professionals
- Community involvement
- Promote increased quality of life

What is Heart to Heart?
Heart to Heart Training Program

OVERVIEW OF DETAILS

**Education & Training**
- 2 in-person training sessions with our team at Summerfield Healthcare.
- Online training modules to be completed at home.

**Face to Face Interactions**
- 1 hour sessions each week for the duration of the program with residents with dementia.

**Shadowing Opportunities**
- Occupational therapists
- Physical therapists
- RNs & CNAs
- Activities director

---

**Why We Need You!**

**BREAK THE STIGMA**
The more people are able to learn about dementia, the less stigma there will be about this population.

**CREATIVITY**
Creativity and willingness to try new activities with the residents truly enhance the experience for both the resident and the volunteer!

**INTERGENERATIONAL**
There is so much value in developing an intergenerational relationship for both the young person and the older person!

**KNOWLEDGE & CONFIDENCE!**
We will equip you with the knowledge needed to create successful visits! Your confidence is key here in your experience with the residents.
## Why is This Important?

<table>
<thead>
<tr>
<th>Aging Population</th>
<th>Prevalence of Dementia</th>
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<td>As the population changes, there is a need for assistance with the aging adults. The older adult population will outnumber the rest of the population.</td>
<td>As the older adult community increases, the number of incidences of dementia will increase as well. Often, individuals with dementia live in care facilities.</td>
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<tr>
<th>Quality of Life</th>
<th>Stigma</th>
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<td>Often, individuals with dementia do not receive regular visits from family members or volunteers, and experience loneliness. Social interaction is a meaningful way for individuals with dementia to experience a greater quality of life.</td>
<td>Negative and inaccurate societal beliefs about dementia impact the desire of community members to volunteer with this population.</td>
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**Thank you!**

Any questions?
Are You Interested?

CONTACT US!

heart2heartprogram2020@gmail.com
Heart to Heart Volunteer Contact Form

Name of Volunteer ___________________________ Today’s Date _______________________

Home Address ___________________________________________________________________

Telephone Number ___________________________________________________________________

Email ____________________________________________________________________________

In the event of an emergency, please list the names and contact information of the individuals you would like us to contact.

Emergency Contact #1
Name of Emergency Contact _______________________________________________________
Relationship _________________________________________
Home Address ___________________________________________________________________
Telephone Number ___________________________________________________________________

Emergency Contact #2
Name of Emergency Contact _______________________________________________________
Relationship _________________________________________
Home Address ___________________________________________________________________
Telephone Number ___________________________________________________________________


Heart to Heart Volunteer Consent Form

By signing this consent form, I acknowledge that I am volunteering my time, in order to participate in the Heart to Heart Program at [Name of Site Here].

I understand my participation is completely voluntary, without pay, compensation, or benefits. I understand that I may stop volunteering at any time.

I understand I am volunteering with residents with dementia, who may exhibit challenging behaviors, including but not limited to, forgetfulness, confusion, agitation, or aggression.

I understand my volunteer duties include one-on-one visits that may require me to provide physical assistance during activities, but not for mobility, when working with a resident with dementia.

I understand that information about the residents at this facility, families of the residents, and/or employees shall be held confidential and never discussed with anyone outside or inside the facility.

I certify that I am at least eighteen (18) years of age or I have had this document reviewed and signed by my parent or guardian.

I have carefully read this agreement and fully understand its contents. I consent to all terms of this agreement.

Volunteer Printed Name ___________________________ Volunteer Date of Birth _______
Volunteer Signature ___________________________ Date _______________________

Parental/Guardian Consent

If the individual is a minor (under 18 years of age), the following must be signed by a parent or legal guardian.

By signing below, I acknowledge that I am the parent or legal guardian of the minor named above. I have reviewed the above agreement with my child. I consent and agree to the terms above. I authorize my child to volunteer at [Name of Site Here].

Parent/Guardian Printed Name _______________________________________________
Parent/Guardian Signature ___________________________ Date _______________________
Parent/Guardian Relationship to Volunteer ______________________________________
The following form is to be completed by the volunteer prior to beginning their in-person visits with participating residents with dementia at the skilled nursing facility.

The volunteer should return these forms indicated on the volunteer checklist to the Activities Director at the skilled nursing facility once all items have been completed.
Heart to Heart Volunteer Checklist

Thank you so much for participating with the Heart to Heart dementia volunteer program!

Before starting your visits, please complete the following:

- Volunteer Consent Form
- Volunteer Contact Form
- Day 1 of In-Person Training
- Pre-Volunteer Survey
- Online Course (on Rise)
- Day 2 of In-Person Training

Please submit your completed forms to the Activities Director.

Thank you and we hope you enjoy your time volunteering with Heart to Heart!
OVERVIEW OF TRAINING SCHEDULE

1. One hour In-Person Training Day 1
2. Volunteers Complete Online Training Modules
3. One hour In-Person Training Day 2

Once trainings have been completed, it is time to begin volunteer sessions!
IN PERSON TRAINING
DAY ONE (OF TWO)

This in-person training will include introductions of the program, facility, and staff, gather information about volunteer experience, and provide a tour of the facility

Agenda for In-Person Training Day 1
Introduce program
Introduce staff
Discuss expectations and requirements of volunteers
Sharing of any previous experience
Think pair share
Tour of facility
Final Questions

Provide student volunteers a physical handout of the pre-survey evaluation to complete before in-person training day 2.
Online training will include modules educating the learners about dementia, dementia stages and ACL, communication strategies, and the activities box. Supplemental information about dementia and general communication skills will be adapted from ACA® training materials.

Each module includes a variety of knowledge interactive assessments, such as quizzes, matching, flashcards, and case studies. Modules will also include photos and audio to provide a variety of learning experiences.
In order to access this online training resource, please use the following URL:

https://www.dominican.edu/academics/schools/school-health-and-natural-sciences/healthy-aging
After completing the online module, the volunteers will return to the facility to complete their last in-person training. During this time, they will work together to role-play scenarios they may encounter during their visits with residents and become familiar with the activities box. They will also receive information on how to log their hours.

**Agenda for In-Person Training Day 2**

Reflection of the online modules
Explanation of activity box and client cards
Group activity
Logging hours (see form on page 27)
Closing and questions
Heart to Heart Volunteer Hours

Name: ____________________________

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<th>Date</th>
<th>Time In</th>
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HEART TO HEART
IN-PERSON
TRAINING DAY 1

Presented by: [Name of Presenter Here; Name of Associated Site]

Created by: [Natalie Koong, OTS; Kymara Kruta, OTS; Victoria Ramos, OTS; Kori Wallace, OTS
Dominican University of California
W52Y7221]

Agenda for Day 1

- Introduce program
- Introduce staff
- Discuss expectations and requirements of volunteers
- Sharing of any previous experience
- Think pair share
- Tour of facility
- Explanation of activity box and client profiles
Objectives and Goals Day 1

In-Person Training

- Understand procedure for logging volunteer hours
- Locate facility reception desk, nursing station, activity room, and resident rooms.
- Identify key facility staff to address questions and issues that may arise, and best methods of contact.
- Define dementia, and understand various strengths in early and middle stage dementia.

What is Heart to Heart?
Meet the Staff!!

- Administrator
- Director of Nursing
- Activity Director
- Occupational Therapist
- Physical Therapist
- Director of Rehabilitation

Expectations & Requirements For Volunteers

- Be on time to trainings and scheduled visits.
- Come with a good attitude.
- Respect the residents, other volunteers, and staff at site.
- Communicate concerns and questions when they come up.
- Sign in and out each day.
When you hear the word dementia, what words come to mind?

THINK PAIR SHARE

Talk with the person next to you

Come up to the board and write the words down

Group discussion:
Share any experience you have had in this setting, and/or experience you hope to gain during your time participating in Heart to Heart.
Let’s Get Up & Tour the Facility!

Assignment: Online Learning Modules

Please complete the Online Learning Modules prior to coming to the second in-person training!

Thank you for your commitment! We look forward to working with you!
Any Questions?

HEART TO HEART IN-PERSON TRAINING DAY 2

Presented by: [Name of Presenter Here; Name of Associated Site]

Created by: [Nad Hsang, CRT, Kyomi Kawasaki, CRT, Victoria Bumia, CRT, Kelly Wallace, CRT]

Dental University of California
1000 Folsom
San Francisco, CA
3000 10th Street
Oakland, CA

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AGENDA FOR THE DAY

- Reflection on the online modules.
- Explanation of activity box and client profiles.
- Group activity.
- Logging hours.
- Questions and closing.

Objectives and Goals for Day 2

1. Feel confident in using the activity box to create meaningful interactions
2. Be able to select an appropriate activity for a resident based on their stage of dementia, and client profile.
3. Be able to demonstrate the activities to a resident using appropriate strategies.
4. Be able to log hours correctly for each session.
Online Module
Reflection and Questions

This is the time to clarify any questions you may have from completing the online modules with us!
Let’s Practice!

GROUP Activity

Clocking in and out / Logging Volunteer Hours
The licensed occupational therapist at the skilled nursing facility will use information about the resident with dementia gathered from the occupational profile, assessments completed with the resident, and activity prescriptions to guide the creation of the client profile card.

The client profile card identifies important resident information, such as the resident’s stage of dementia, sensory likes and dislikes, supportive strategies, strengths, challenges, recommended conversation topics, recommended activities, and favorite songs.

The volunteer can use the client profile for their visits with residents with dementia, as this information allows the volunteer to understand the resident on a more personal level and facilitate more meaningful visits.
Heart to Heart Volunteer Client Profile

Initials: ___ Room #: __________ Preferred Name: ____________________________

Stage of Dementia (ACL and stage): __________________________________________

Responds well to:

☐ Sight: __________________________________________________________________

☐ Touch: __________________________________________________________________

☐ Sound: __________________________________________________________________

☐ Smell: __________________________________________________________________

To complete activities, client may benefit from:

☐ Verbal instructions ☐ Text (list, labels) ☐ Gestures

☐ Modeling ☐ Physical help

☐ Other: ____________________________________________________________________

Strengths: __________________________________________________________________

___________________________________________________________________________

___________________________________________________________________________

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___________________________________________________________________________

___________________________________________________________________________

Conversation topics of interest:

___________________________________________________________________________

___________________________________________________________________________

___________________________________________________________________________

___________________________________________________________________________

___________________________________________________________________________

___________________________________________________________________________

Activities of interest:

___________________________________________________________________________

___________________________________________________________________________

___________________________________________________________________________

___________________________________________________________________________

___________________________________________________________________________

___________________________________________________________________________

Completed by: ______________________________ Date: ______________
The activity boxes are designed to provide the volunteers with tools and structure to facilitate activities and meaningful communication for residents with dementia. The activity boxes will contain various games, activities, objects, as well as instructions for suggested use of contents based on the resident’s abilities and interests. The aim of providing these organized activity boxes to volunteers during their visits with IwD is to increase the volunteer’s confidence in engaging with IwD, and to promote meaningful interactions during the visits. All of the contents of the activity box will be made accessible and replicable in order to create multiple boxes, and for continued use by the activities director in skilled nursing facilities.
ACTIVITY BOX CONTENTS

Balloons
Deck of Cards
Jigsaw Puzzle
Flameless Candles
Essential Oil Diffuser
Lavender Essential Oil
Jewelry Making (Cord & Beads)
Water Paint Book & Paint Brushes
Artificial Flower Bouquet & Plastic Vases
ACTIVITY BOX

CONTENTS: PHOTO

- Flower Arranging
- Essential Oil Diffuser
- Wood Beads
- Puzzles
- Cotton Cord & Scissors
- Flameless Candles
- Balloons
- Deck of Cards
- Water Painting Paint Brush
# Heart to Heart Program

## Activity Box Instructions

<table>
<thead>
<tr>
<th>Activity</th>
<th>Materials</th>
<th>Description</th>
<th>Modifications for Early Stage</th>
<th>Modifications for Middle Stage</th>
</tr>
</thead>
</table>
| Number One Flower Arranging | Artificial flowers and 2 vases (one for resident, one for volunteer). | The resident will make flower arrangements using artificial flowers and vases for themselves or for other close friends. | - Lay out flowers and vase on table in front of resident.  
- Give resident up to 3 step instructions for engaging in activity.  
- Example of using 3 step instructions: "Gather the grey cup, pick out the flowers you like, and put the flowers in the cup." | - Position self and flowers 14-18 inches in front of resident.  
- Create a display of the flower arrangement.  
- Display 3-5 flowers and a vase on the table in front of resident.  
- Use 1 step instructions at a time.  
- Example of using 3 step instructions: "Pick a flower from the vase, put it in the grey cup, and then give it to the other person."  
- Give next step.  
- Example of next instruction: "Put flower in the grey cup." (Repeat). |
| Number Two Jewelry Making | Cotton string, wooden beads, and scissors | The resident will make a piece of jewelry of their choosing using beads and string. | - Set up materials on table in front of resident.  
- Give clear, 1-3 step instructions for engaging in the activity.  
- Example of using 1 step instructions at a time: "Pick out 3 beads you like." (Resident follows instructions to pick out beads).  
- Example of next instruction: "Now pick out a long string, or a short string." | - Only give the resident 1-2 of beads at a time.  
- Volunteer strings the beads, and volunteer can instruct resident to pick up the beads they want for their necklace or bracelet, then volunteer can instruct resident to braid wooden each bead, one at a time.  
- Volunteer can help string the beads in the air to help it braid up and down. |
| Number Three Balloon Toss | Balloons | The volunteer will blow up the balloons and tie it. The resident and volunteer will pass the balloons back and forth without letting it touch the ground. Keep track of how many times you pass it back and forth each round. | If activity is very easy for resident, volunteer can add in more balloons, increasing the complexity of the activity. | - Have resident place the balloon into your hand instead of hitting balloon back and forth.  
- Volunteer can simply hold the balloon in the air to keep it bouncing up and down. |
| Number Four Puzzles | Puzzle pieces | The volunteer and the resident will put the puzzle together. | Separate the puzzle into colors and sections and only work on one section at a time. | - Separate the puzzle into sections and only work on one section at a time.  
- Directly hand 2 or more puzzle pieces to the resident that will fit together, and have the resident put the correct pieces together. |
| Number Five Card Games | Deck of Cards | The volunteer and the resident will play simple and familiar card games (e.g. go fish, war, gin rummy). | Volunteer can utilize simplified instructions to describe rules of card game. | Volunteer sits 14-18 inches in front of resident, and utilize 1 step directions, and other cues to help resident understand (verbal, visual, and physical cues). |
| Number Six Painting Pictures using Water Beads | Water, wax, painting picture and beads from kit | The volunteer and resident will use a wet paint brush to paint the provided water painting card. (Each card is smooth, and only requires water to make the colorful picture appear). | Volunteer can verbally instruct resident how to paint the picture using 1-3 step instructions.  
- Example of using 3 step instructions: "Pick up the piece you would like to paint, paint out a paint brush, then dip the paint brush in the water to start painting." | - Help resident in demonstrating how to paint the picture using the materials.  
- Volunteer use 3 step directions at a time. |
| Number Seven Part A Flameless Candles | Flameless candles | Use of flameless candles during visiting sessions to provide an enhanced sensory experience. | Volunteer can verbally instruct resident how to turn on and off flameless candle using 1-3 step directions.  
- Resident can be in charge of turning on and off the candles for each session, if they desire. | - Volunteer demonstrates visually how to turn on and off flameless candle, while also using 1 step verbal directions to describe steps.  
- Resident can turn the candles on and off at the end of the session. |
| Number Seven Part B Essential Oil Diffuser | Essential oil diffuser and essential oil | Use of essential oil diffuser during visiting sessions to provide an enhanced sensory experience. | Volunteer demonstrates how to set up the diffuser before allowing resident to participate.  
- Resident can be in charge of adding water and essential oil to diffuser, and turning on and off the diffuser for each session, if desired. | - Volunteer demonstrates visually how to add water and essential oil to the diffuser, while using 1 step direction to describe each step.  
- Volunteer demonstrates visually how to turn on and off diffuser, while using 1 step direction to describe action.  
- Resident can turn on the candles for use during sessions, and turn off at the end of the session. |

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The Heart to Heart Dementia Volunteer Program Handbook is designed to be an easy and accessible tool for volunteers to utilize. Within the handbook are helpful, concise tips for communication with individuals with dementia, broken down by the specific stages.

This handbook was created thoughtfully to enhance the volunteer's confidence when they need additional support during sessions with volunteers. The content outlines stage-specific strengths and challenges, as well as tips for meaningful communication and activities with the resident.
TABLE OF CONTENTS

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WAYS TO HELP YOUR RESIDENT COMPLETE ACTIVITIES........................................3
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### WAYS TO HELP YOUR RESIDENT COMPLETE ACTIVITIES

#### VERBAL CUES

<table>
<thead>
<tr>
<th>Direct</th>
<th>Indirect</th>
</tr>
</thead>
</table>
| Provide simple instructions for resident to complete an activity.  
*“Put the flower in the vase.”* | Ask questions or provide simple choices to allow the resident to problem solve through an activity.  
*“Does the flower go in the vase or in the cup?”* |

#### VISUAL CUES

<table>
<thead>
<tr>
<th>Environmental</th>
<th>Gestural</th>
<th>Demonstration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use pictures, labels, lists, checklists, or visible objects to help the resident understand what to do and locate items.</td>
<td>Point or gesture to help the resident locate objects or a destination.</td>
<td>Model how to complete a task by doing it, for the resident to imitate.</td>
</tr>
</tbody>
</table>

#### PHYSICAL CUES

<table>
<thead>
<tr>
<th>Touch Body Part</th>
<th>Hand Over/Under Hand</th>
<th>Guiding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Touch a body part to gain the resident’s attention.</td>
<td>Place your hand over the resident’s hand to guide movement or provide comforting touch.</td>
<td>Move the resident’s body to help them complete a task.</td>
</tr>
</tbody>
</table>

#### CONTEXTUAL – Sensory Bridging

Complete activities in familiar environments and the same environment across visits
STRENGTHS – EARLY STAGE

Individuals at early stage dementia may:

- speak clearly and have conversations
- complete familiar and simple activities with supplies in sight and a model
- function well with routine and old habits
- maintain attention for 20-60 minutes
- pay attention to people and things within 3-4 feet in front of them
- learn new information with repetition

CHALLENGES – EARLY STAGE

Individuals at early stage dementia may have difficulty with:

- solving problems
- demonstrating safety
- compromising
- recalling short-term memory
- making appropriate judgement
- learning new skills
- completing complex activities

TIPS FOR FACILITATING ACTIVITIES AT EARLY STAGE

- Use familiar objects and activities
- Provide instructions 1-3 steps at a time
- Demonstrate or provide a model or sample for activities
- Repeat activities to allow for learning of new skills
- Reminisce about favorite conversations

SUGGESTED ACTIVITIES AT EARLY STAGE

<table>
<thead>
<tr>
<th>Bingo</th>
<th>Basic card games</th>
<th>Crafts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Painting</td>
<td>Coloring</td>
<td>Drawing</td>
</tr>
<tr>
<td>Sewing</td>
<td>Knitting</td>
<td>Crocheting</td>
</tr>
<tr>
<td>Crosswords</td>
<td>Word finds</td>
<td>Puzzles</td>
</tr>
<tr>
<td>Gardening</td>
<td>Balloon volleyball</td>
<td></td>
</tr>
</tbody>
</table>

See the next page for an example of an adapted craft activity!
In the Heart to Heart Activity Box, you will find materials and instructions to facilitate jewelry making.

**Materials include:**
- Cotton string
- Wooden beads
- Scissors

**Tips to set up, adapt, and facilitate jewelry making for early stage dementia:**
- Set up the materials on the table in front of the resident.
- Provide clear instructions 1-3 steps at a time. For example,
  - Say, "Pick out 3 beads."
  - Say, "Pick up the string."
  - Say, "Cut the string this long," while providing a gestural cue.
- Demonstrate how to string the bead.
- Provide a model of a completed jewelry piece.
- Talk about a conversation topic from the resident’s client profile.
- Repeat the activity across several visits to encourage the resident’s learning.
STRENGTHS – MIDDLE STAGE

Individuals at middle stage dementia may:

- pick up, reach for, and let go of objects
- walk or move their wheelchair
- complete familiar activities with cues for what to do next and assistance (verbal, visual, or touch)
- maintain attention for 5-20 minutes
- pay attention to people and things within 14-18 inches in front of them

CHALLENGES – MIDDLE STAGE

Individuals at middle stage dementia may have difficulty with:

- knowing what to do with objects
- recognizing mistakes, problem solving, or asking for help
- remembering
- learning new things
- feeling confused or fearful
- knowing what to do next
- communicating their wants and needs
- understanding what to do next

TIPS FOR FACILITATING ACTIVITIES AT MIDDLE STAGE

- Position self and objects 14-18 inches in front of the resident
- Use familiar objects and activities
- Provide instructions 1 step at a time
- Provide verbal, visual, or touch cues to help the resident complete activities
- Gain the resident’s attention with a variety of stimulating sights, sounds, touch, or smells
- Reduce distractions in the environment

SUGGESTED ACTIVITIES AT MIDDLE STAGE

<table>
<thead>
<tr>
<th>Music</th>
<th>Singing</th>
<th>Playing instruments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wiping/polishing</td>
<td>Folding</td>
<td>Sanding</td>
</tr>
<tr>
<td>Sorting objects in/out of containers</td>
<td>Balloon toss</td>
<td>Building blocks</td>
</tr>
<tr>
<td>Large puzzles</td>
<td>Basic Crafts</td>
<td>Painting</td>
</tr>
<tr>
<td>Clay/dough kneading</td>
<td>Coloring</td>
<td>Sewing cards</td>
</tr>
</tbody>
</table>

See the next page for an example of an adapted puzzle activity!
In the Heart to Heart Activity Box, you will find materials and instructions to facilitate puzzles.

**Materials include:**
- Puzzle pieces

**Tips to set up, adapt, and facilitate puzzles for middle stage dementia:**
- Set up the materials on the table in front of the resident.
- Remove all unnecessary items or distractions in the environment, if possible.
- Gain the resident’s attention by touching their body part and speaking about 14-18 inches in front.
- Separate the puzzles into sections and only work on one section at a time.
- Provide clear instructions 1 step at a time. For example,
  - Say, “Pick up this piece,” while pointing at the piece.
  - Say, “Put the piece here,” while supporting the resident’s elbow and moving the resident’s hand toward the piece.
- Directly hand the resident two pieces that will fit together.
- Play preferred music from the resident’s client profile, if applicable.
- Diffuse preferred essential oils from the resident’s profile, if applicable.
To evaluate the effectiveness of Heart to Heart, volunteers will complete a questionnaire with Likert Scale questions, as well as questions regarding knowledge and beliefs about dementia before completing their volunteer training (in-person and online). The volunteers will complete the same survey at the commencement of their final visit with the residents in Heart to Heart. The scale will evaluate volunteer satisfaction, comfort, confidence, and knowledge of dementia. Scores from pre- and post- training will be compared to determine the effectiveness of the program on improving volunteer knowledge, ease, and competency in engaging with residents with dementia.

The questionnaire addresses knowledge of dementia and attitudes towards dementia. Nine questions in a Likert Scale will determine the volunteer’s knowledge of dementia.

Surveys can be accessed online, or the program facilitator may wish to provide physical copies to the volunteers.

**Link for the online version of survey to be administered before volunteers complete training:**
https://forms.gle/533MMGj8cxUNpdqX7

**Link for the online version of survey to be administered after their final visit of the program:**
https://forms.gle/8oH5NeABCPCkoSES9
Heart to Heart Program Survey

Thank you for participating in the Heart to Heart volunteer program!

Heart to Heart is a program designed to provide volunteers with sufficient knowledge about dementia in order to promote effective communication strategies and meaningful interactions between volunteers and individuals with dementia. The primary aim of this program is to facilitate feelings of confidence in volunteers to promote frequency of visits, thus enhancing the quality of life and decreasing social isolation for IwD.

Heart to Heart has been created by four occupational therapy students at Dominican University of California with the guidance of Dr. Gina Tucker-Roghi, OTD, OTR/L.

The survey should not take longer than 15 minutes.

Information gathered from this survey is solely used for the purpose of improving Heart to Heart volunteer program. We wish to better understand our volunteers, in terms of their knowledge about dementia and their attitude towards individuals with dementia, in order to provide meaningful support throughout the program. If you have any questions or needs assistance, please contact at: heart2heartprogram2020@gmail.com
Heart to Heart Program Survey

Dementia Knowledge

Here are some statements about dementia.

Please read each statement carefully and select one to show if you agree or disagree with the statement, or if you do not know. Please fill out every section.


- Dementia occurs because of changes in the brain.
  - Yes □ No □ I don’t know

- Brain changes causing dementia are often progressive.
  - Yes □ No □ I don’t know

- Confusion in an older person is almost always due to dementia.
  - Yes □ No □ I don’t know

- Only older adults develop dementia.
  - Yes □ No □ I don’t know

- Dementia is likely to limit life expectancy.
  - Yes □ No □ I don’t know

- Uncharacteristic distressing behaviors may occur in people who have dementia (e.g., aggressive behavior in a gentle person).
  - Yes □ No □ I don’t know

- Changing the environment (e.g., putting on a CD, opening or closing the blinds) will make no difference to a person who has dementia.
  - Yes □ No □ I don’t know

- When a person who has dementia is distressed, it may help to talk to them about their feelings.
  - Yes □ No □ I don’t know

- It is important to always correct a person who has dementia when they are confused.
  - Yes □ No □ I don’t know
Heart to Heart Program Survey

Attitude towards Dementia

Please rate each statement according to how much you agree or disagree with it. Mark 1, 2, 3, 4, or 5, according to how you feel in each case. Please be honest. There are no right or wrong answers.


I feel confident around individuals with dementia.
☐ 1        ☐ 2        ☐ 3        ☐ 4        ☐ 5
Strongly disagree                   Strongly agree

I am comfortable touching individuals with dementia.
☐ 1        ☐ 2        ☐ 3        ☐ 4        ☐ 5
Strongly disagree                   Strongly agree

I feel uncomfortable being around individuals with dementia.
☐ 1        ☐ 2        ☐ 3        ☐ 4        ☐ 5
Strongly disagree                   Strongly agree

I am not very familiar with individuals with dementia.
☐ 1        ☐ 2        ☐ 3        ☐ 4        ☐ 5
Strongly disagree                   Strongly agree

I would avoid an agitated individual with dementia.
☐ 1        ☐ 2        ☐ 3        ☐ 4        ☐ 5
Strongly disagree                   Strongly agree

I feel relaxed around individuals with dementia.
☐ 1        ☐ 2        ☐ 3        ☐ 4        ☐ 5
Strongly disagree                   Strongly agree

I feel frustrated because I don’t know how to help an individual with dementia.
☐ 1        ☐ 2        ☐ 3        ☐ 4        ☐ 5
Strongly disagree                   Strongly agree
Heart to Heart Program Survey

It is rewarding to work with individuals with dementia.

1 2 3 4 5
Strongly disagree Strongly agree

I cannot imagine caring for someone with dementia.

1 2 3 4 5
Strongly disagree Strongly agree

I am afraid of individuals with dementia.

1 2 3 4 5
Strongly disagree Strongly agree

Individuals with dementia can be creative.

1 2 3 4 5
Strongly disagree Strongly agree

Every person with dementia has different needs.

1 2 3 4 5
Strongly disagree Strongly agree

Individuals with dementia like having familiar things nearby.

1 2 3 4 5
Strongly disagree Strongly agree

It is important to know the past history of the individuals with dementia.

1 2 3 4 5
Strongly disagree Strongly agree

It is possible to enjoy interacting with individuals with dementia.

1 2 3 4 5
Strongly disagree Strongly agree

Individuals with dementia can enjoy life.

1 2 3 4 5
Strongly disagree Strongly agree
Heart to Heart Program Survey

**Individuals with dementia can feel when others are kind to them.**

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
</table>

Strongly disagree | Strongly agree

**We can do a lot now to improve the lives of individuals with dementia.**

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
</table>

Strongly disagree | Strongly agree

**I admire the coping skills of individuals with dementia.**

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
</table>

Strongly disagree | Strongly agree

**Difficult behaviors may be a form of communication for individuals with dementia.**

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
</table>

Strongly disagree | Strongly agree
Heart to Heart Program Survey

Thank you for participating in the Heart to Heart volunteer program!

Heart to Heart is a program designed to provide volunteers with sufficient knowledge about dementia in order to promote effective communication strategies and meaningful interactions between volunteers and individuals with dementia. The primary aim of this program is to facilitate feelings of confidence in volunteers to promote frequency of visits, thus enhancing the quality of life and decreasing social isolation for IwD.

Heart to Heart has been created by four occupational therapy students at Dominican University of California with the guidance of Dr. Gina Tucker-Roghi, OTD, OTR/L.

The survey should not take longer than 25 minutes.

Information gathered from this survey is solely used for the purpose of improving Heart to Heart volunteer program. We wish to better understand our volunteers, in terms of their knowledge about dementia and their attitude towards individuals with dementia, in order to provide meaningful support throughout the program. If you have any questions or needs assistance, please contact at: heart2heartprogram2020@gmail.com
Heart to Heart Program Survey

Dementia Knowledge

Here are some statements about dementia.

Please read each statement carefully and select one to show if you agree or disagree with the statement, or if you do not know. Please fill out every section.


Dementia occurs because of changes in the brain.
□ Yes □ No □ I don’t know

Brain changes causing dementia are often progressive.
□ Yes □ No □ I don’t know

Confusion in an older person is almost always due to dementia.
□ Yes □ No □ I don’t know

Only older adults develop dementia.
□ Yes □ No □ I don’t know

Dementia is likely to limit life expectancy.
□ Yes □ No □ I don’t know

Uncharacteristic distressing behaviors may occur in people who have dementia (e.g., aggressive behavior in a gentle person).
□ Yes □ No □ I don’t know

Changing the environment (e.g., putting on a CD, opening or closing the blinds) will make no difference to a person who has dementia.
□ Yes □ No □ I don’t know

When a person who has dementia is distressed, it may help to talk to them about their feelings.
□ Yes □ No □ I don’t know

It is important to always correct a person who has dementia when they are confused.
□ Yes □ No □ I don’t know
Heart to Heart Program Survey

Attitude towards Dementia

Please rate each statement according to how much you agree or disagree with it. Mark 1, 2, 3, 4, or 5, according to how you feel in each case. Please be honest. There are no right or wrong answers.


I feel confident around individuals with dementia.
☐ 1  ☐ 2  ☐ 3  ☐ 4  ☐ 5
Strongly disagree  Strongly agree

I am comfortable touching individuals with dementia.
☐ 1  ☐ 2  ☐ 3  ☐ 4  ☐ 5
Strongly disagree  Strongly agree

I feel uncomfortable being around individuals with dementia.
☐ 1  ☐ 2  ☐ 3  ☐ 4  ☐ 5
Strongly disagree  Strongly agree

I am not very familiar with individuals with dementia.
☐ 1  ☐ 2  ☐ 3  ☐ 4  ☐ 5
Strongly disagree  Strongly agree

I would avoid an agitated individual with dementia.
☐ 1  ☐ 2  ☐ 3  ☐ 4  ☐ 5
Strongly disagree  Strongly agree

I feel relaxed around individuals with dementia.
☐ 1  ☐ 2  ☐ 3  ☐ 4  ☐ 5
Strongly disagree  Strongly agree

I feel frustrated because I don’t know how to help an individual with dementia.
☐ 1  ☐ 2  ☐ 3  ☐ 4  ☐ 5
Strongly disagree  Strongly agree
Heart to Heart Program Survey

It is rewarding to work with individuals with dementia.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5
Strongly disagree  Strongly agree

I cannot imagine caring for someone with dementia.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5
Strongly disagree  Strongly agree

I am afraid of individuals with dementia.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5
Strongly disagree  Strongly agree

Individuals with dementia can be creative.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5
Strongly disagree  Strongly agree

Every person with dementia has different needs.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5
Strongly disagree  Strongly agree

Individuals with dementia like having familiar things nearby.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5
Strongly disagree  Strongly agree

It is important to know the past history of the individuals with dementia.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5
Strongly disagree  Strongly agree

It is possible to enjoy interacting with individuals with dementia.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5
Strongly disagree  Strongly agree

Individuals with dementia can enjoy life.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5
Strongly disagree  Strongly agree
Heart to Heart Program Survey

Individuals with dementia can feel when others are kind to them.

☐ 1  ☐ 2  ☐ 3  ☐ 4  ☐ 5
Strongly disagree  Strongly agree

We can do a lot now to improve the lives of individuals with dementia.

☐ 1  ☐ 2  ☐ 3  ☐ 4  ☐ 5
Strongly disagree  Strongly agree

I admire the coping skills of individuals with dementia.

☐ 1  ☐ 2  ☐ 3  ☐ 4  ☐ 5
Strongly disagree  Strongly agree

Difficult behaviors may be a form of communication for individuals with dementia.

☐ 1  ☐ 2  ☐ 3  ☐ 4  ☐ 5
Strongly disagree  Strongly agree
Heart to Heart Program Survey

**Volunteer Satisfaction**
Please rate each statement according to how much you agree or disagree with it. Mark 1, 2, 3, 4, or 5, according to how you feel in each case. Please be honest. There are no right or wrong answers.

**Overall, I am satisfied with the Heart to Heart volunteer program at Summerfield.**

☐ 1  ☐ 2  ☐ 3  ☐ 4  ☐ 5  
Strongly disagree  Strongly agree

**I received the information I needed regarding my volunteer role.**

☐ 1  ☐ 2  ☐ 3  ☐ 4  ☐ 5  
Strongly disagree  Strongly agree

**My volunteer job description accurately reflects what I am asked to do.**

☐ 1  ☐ 2  ☐ 3  ☐ 4  ☐ 5  
Strongly disagree  Strongly agree

**I received the training I needed to perform my volunteer job duties.**

☐ 1  ☐ 2  ☐ 3  ☐ 4  ☐ 5  
Strongly disagree  Strongly agree

**I felt comfortable interacting with the resident when utilizing the activity box.**

☐ 1  ☐ 2  ☐ 3  ☐ 4  ☐ 5  
Strongly disagree  Strongly agree

**I know more about dementia after participating in the volunteer program.**

☐ 1  ☐ 2  ☐ 3  ☐ 4  ☐ 5  
Strongly disagree  Strongly agree

**I feel more comfortable interacting with individuals with dementia after participation in the volunteer program.**

☐ 1  ☐ 2  ☐ 3  ☐ 4  ☐ 5  
Strongly disagree  Strongly agree

**I will recommend others to participate in the Heart to Heart volunteer program.**

☐ 1  ☐ 2  ☐ 3  ☐ 4  ☐ 5  
Strongly disagree  Strongly agree
Heart to Heart Program Survey

Your input helps us!
We want to know your experience while volunteering with Heart to Heart.
Please feel free to leave feedback to help improve this program for future volunteers.

What are things you enjoyed about the Heart to Heart program?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

Are there any suggestions you have for improvements to the Heart to Heart program for future volunteers?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________
Scores from pre- and post-volunteer surveys should be compared to determine the program’s impact on volunteer knowledge, ease, and competency in engaging with residents with dementia.

Instructions for survey scoring sheets can be found within the scoring document.
Heart to Heart Survey: Scoring sheet

Dementia Knowledge


1. Dementia occurs because of changes in the brain.
2. Brain changes causing dementia are often progressive.
3. Confusion in an older person is almost always due to dementia.*
4. Only older adults develop dementia.*
5. Dementia is likely to limit life expectancy.
6. Uncharacteristic distressing behaviors may occur in people who have dementia (e.g., aggressive behavior in a gentle person).
7. Changing the environment (e.g., putting on a CD, opening or closing the blinds) will make no difference to a person who has dementia.*
8. When a person who has dementia is distressed, it may help to talk to them about their feelings.
9. It is important to always correct a person who has dementia when they are confused.*

Note:* Statement is incorrect, therefore reverse scored.

For this tool, ‘Don’t know’ responses are coded as incorrect. The total number of correct responses are summed to provide an indication of ‘foundation level’ knowledge of dementia. When providing education sessions, the specific items/ areas addressed by the education are clearly the ones that you would expect to be answered correctly by more people after the education than before.

Attitude towards Dementia


1. I feel confident around individuals with dementia.
2. I am comfortable touching individuals with dementia
3. I feel uncomfortable being around individuals with dementia.*
4. I am not very familiar with individuals with dementia.*
5. I would avoid an agitated individual with dementia.*
6. I feel relaxed around individuals with dementia.
7. I feel frustrated because I don’t know how to help an individual with dementia.*
8. It is rewarding to work with individuals with dementia.
9. I cannot imagine caring for someone with dementia.*
10. I am afraid of individuals with dementia.*
11. Individuals with dementia can be creative.
12. Every person with dementia has different needs.
13. Individuals with dementia like having familiar things nearby.
14. It is important to know the past history of the individuals with dementia.
15. It is possible to enjoy interacting with individuals with dementia.
16. Individuals with dementia can enjoy life.
17. Individuals with dementia can feel when others are kind to them.
18. We can do a lot now to improve the lives of individuals with dementia.
19. I admire the coping skills of individuals with dementia.
20. Difficult behaviors may be a form of communication for individuals with dementia.

Note: *Statements are reverse scored.

To arrive at a total score, add up all the items and calculate the average.

**Volunteer Satisfaction**

To arrive at a total score, add up all the items and calculate the average.
Open-ended question utilized to gain qualitative reports from the participants
For questions regarding the program, please contact Dr. Gina Tucker-Roghi OTD, OTR/L
gina.tucker-roghi@dominican.edu
REFERENCES


https://doi.org/dominican.idm.oclc.org/10.1016/j.gerinurse.2019.03.010


