ABSTRACT

This article describes the use of the well-tested Future Search approach to achieving a common goal through a peer-managed consensus model. The issues and planning strategies forged through the use of the Future Search process are relevant to both volunteerism in general and senior volunteerism in particular. With rapid changes in societal infrastructures, an unstable economy, and rising numbers of at-risk populations, the volunteer community has been and will continue to be called upon to respond. To provide the most effective volunteer service, organizations can employ consensus-building planning strategies such as the Future Search to reach mutually satisfactory conclusions about necessary directions for volunteerism. A specific example of utilization of the Future Search approach, in reviewing the inclusion of older volunteers in long-term care, is presented.

Using the Future Search Process for Senior Volunteer Service in Long-Term Care

Laura B. Wilson, PhD,
Jean Carroccio

WHAT IS A FUTURE SEARCH?

Did you ever wonder how you might effectively bring together a group of people with diverse interests and viewpoints and gain consensus as a part of a planning process? Have you struggled with a difficult to define problem or issue in your agency or as a general part of volunteerism and not been able to figure out how to approach a solution? Have you considered how to get a group with a history of inertia or conflict to confront a critical issue together? These are exactly the concepts which the Future Search conference process is designed to address. Created by Marvin Weisbord (1993), the Future Search is based on principles shown to make consensus planning possible. These key principles are:

- To bring together all organizations relevant to the issue in one place: the whole system united.
- To provide an open forum of self-managed peer group planners in which all ideas are considered valid and everyone has relevant information and expertise to contribute to the whole.
- To work toward an agreed-upon future.
- To achieve consensus which is translated into action planning.

The Future Search conference entails about 16 hours of group and individual work organized into four or five tasks that examine the past, present, and future of the issues being searched. Weisbord and his colleagues clearly state that the search itself is not a complex idea. In fact, the conference and the process are simple. In

Dr. Wilson is Director of the National Eldercare Institute on Senior Employment and Volunteerism; Adjunct Professor of the Department of Epidemiology and Preventive Medicine at the University of Maryland at Baltimore; Associate Dean for Research and Development of the College of Health and Human Performance, Director of the Center on Aging, Professor of Health Education, and Director of the Interdisciplinary Health Research Laboratory at the University of Maryland at College Park. Previously she was Professor and Chairman of the Department of Gerontology and Geriatric Services, Director of the Southwest Long Term Care Gerontology Center, and held appointments in the Departments of Family Practice and Community Medicine and Psychiatry at the University of Texas Health Science Center at Dallas. She also was recipient of the Wolens Centennial Chair in Gerontology and Visiting Professor at the University of Texas at Austin.
Jean Carroccio is head of national projects for the Visiting Nurse Associations of America. She has been director for the last four years of the Corporation for National and Community Service demonstration project entitled "The Senior Companion Program and was Visiting Nurse Associations of America Public-Private Partnership Program."

essence, the search is a group process to break down barriers and allow the development of a global view about the problem at hand. The most difficult aspects are getting the key stakeholders (as well as people who do not ordinarily meet together) into the room, to commit to participate as peers actively in the process.

The future search conference is an exploration of common ground based on the ability to learn from experience. The first task establishes the history of the issues viewed in the context of society and the individual, and defines the problem. The second task reviews current trends which affect the issue. The third task identifies the critical aspects to solve the problem at hand. The fourth task creates ideal future scenarios. The final task identifies common themes in the scenarios and develops plans to implement action.

THE FUTURE SEARCH PROCESS IN VOLUNTEERISM: AN EXAMPLE

The future search process, self-described as an optimal planning strategy for ambiguous problems without boundaries—thorny dilemmas posed by the economy, the environment, employment, technology, education, health care, and community planning (Weisbord, 1993), is an ideal way to deal with volunteerism and senior volunteerism. Volunteerism has problems due to complexities associated with the economy, downsizing, health-care cost containment, employment and retirement, and community development. Therefore, to be seen as part of a solution to these societal problems, volunteerism should be central to any planning process. In addition, volunteer agencies should be initiating their own strategic planning to identify their priorities and define their roles within societal issues. The Future Search conference process is ideally applicable.

The effectiveness of such a process can be demonstrated by the example of the Future Search on Senior Companions in Long Term Care. In August, 1994 the Visiting Nurse Associations of America (VNAA) hosted a Future Search conference in Denver, Colorado. Its purpose was to discover ways to expand the Senior Companion Program of non-medical, long-term care services provided by senior volunteers as a part of an overall care strategy. The VNAA and the Senior Companion Program (now a part of the Corporation for National and Community Service but formerly part of ACTION, the federal domestic volunteer program) had worked jointly in 18 sites conducting a national demonstration project which used low income senior volunteers.

These volunteers were stipended to do 20 hours per week of senior service as an extension of the home care team in providing non-medical support to frail elderly living in the community. The program had been well received by the agency participants, the clients, and the volunteers. The regular presence of a peer volunteer was evaluated as providing a way to expand home care services, have ongoing "eyes and ears in the home" when home care team members were not visiting, and meeting some of the interpersonal needs of the homebound older persons (Wilson, 1994). As a result of its excellent evaluation, the VNAA decided to hold a Future Search conference in order to bring together a variety of potentially interested organizational representatives to possibly expand this program.

The VNAA worked with the Corporation for National Service to identify the potential stakeholders for this senior volunteer concept. The attendees came from senior volunteer agencies including American Association of Retired Persons, Foster Grandparent Program, American Red Cross, and the Senior Companion Program; federal agencies including the Department of Health and Human Services, the Corporation for National Service, and Health Care Financing Administration, insurance companies, research and evaluation entities including universities; and potential funders including foundations, federal agencies, and insurers.

Approximately 50 stakeholders came to Denver for the two-day intensive Future

Search conference. All respondents were asked to actively participate in individual and group tasks—to encourage input from every group member and to create a collaborative atmosphere to tap the creativity, and personal experiences of all involved. All ideas were to be considered valid and all information created in small groups would be shared with the whole group. Crucial to the process was that there were no outside experts separate from the stakeholders. The stakeholders were the experts and through group interaction they would seek solutions to problems. No external assistance, no outside small group facilitator, and no other information would be made available.

OUTCOMES OF THE FUTURE SEARCH ON SENIOR COMPANIONS IN LONG-TERM CARE
Task One: Focus on the Past

The first task was to focus on the past. Each stakeholder worked alone to identify memorable past events for society, senior citizens and long-term care, and self. Each person listed memorable events, turning points, and major happenings for the past three decades related to individual/personal life, society as a whole, and older persons and long-term care. These lists were then transferred by each individual to large time lines on the wall categorizing the information into the personal, societal and age related over the past three decades.

Next, small groups met to create a more global view about either the personal, society, or seniors and long-term care time lines. They were instructed to glean from the timeline patterns and then to develop a cohesive picture to share with the group as a whole.

A variety of factors emerged. Critical influences in aging and long-term care were policy developments: Medicare, Medicaid, Social Security, the Older American's Act and the Administration on Aging, the formation of the National Institute on Aging, and the Corporation for National Service, Title V, health care reform, the Family and Medical Leave Act, and the Americans with Disabilities Act. Broader societal events included increase in violence and homelessness over the life span, the Vietnam War, modern technology, the Peace Corps, double digit inflation, changes in the family structure, women's roles, demographics, AIDS, the aging of the baby boomers, and changing employment patterns. Personal themes were associated with education, family, birth, death, marriage, divorce, home purchase, illness, and employment markers.

Task Two: Focus on the Present/Identifying Critical Issues

The group moved to looking at current issues and trends which might affect the future of such a program. Small groups were again created to explore each person's perspective on current issues and trends that impact senior companions in long-term care. First was a small group discussion on current issues and trends which impact senior companions in long-term care. The first category identified was demographics and epidemiological issues, such as expected increases over the next decade of older persons with Alzheimer's Disease and other mental health disorders as well as those with disabilities. The limited size of the Senior Companion Program and its limited geographic distribution were seen as impacting on long-term care expansion despite a well-defined need, a need exacerbated by long distance caregiving and the need for inexpensive alternative forms of assistance for frail homebound elders. Specific demographic issues within the Senior Companion Program (SCP) included the low number of male participants, the existence of more volunteers than placements, difficulties in serving rural areas, the lack of ability to have back-up companions when a senior companion became ill, and the waiting list of patients in need of assistance.

A second issue or trend category was the political and economic environment within which the expansion of the senior companion program must exist. Health care reform efforts, changes in Congress,

federal government block grants to states, and concerns over entitlement programs were issues which would affect the Senior Companion Program. In addition, the economic environment within and external to the SCP program would entail the development of various long-term care insurance products, the need for salaried staff in home care agencies to supervise the volunteers, the insecurity of a changing marketplace, the need to define and demonstrate program effectiveness and cost, and the need to review corporate interest were listed as economic factors affecting the inclusion of senior volunteers into long-term care.

Social and societal attitudinal factors were the third category noted. Funders' lack of orientation to respite services, an increased interest in children and youth in preference to older persons in funding and services, the need for the SCP program to clearly define its focus and strengthen its universal principle of companionship, and questions over the medical versus the social models of health care were noted.

Task Three: Identifying the Ideal Future

Small groups were instructed to develop a creative presentation dramatizing the future of the SCP in long-term care concept. Weisbord sees this as an important part of consensus planning. He states that "by living our dreams as if they have already happened, we ground ourselves in what we really want and are willing to work for."

The format was to project the Senior Companion Care to the year 2000. The groups were to show what the program now looks like and identify what had occurred over the past six years to facilitate these changes. The depiction must define how the future should look and be a future which group members were willing to begin creating now. The formats for the presentation might be a skit, a magazine feature story, a TV talk show or a diorama and had to include the following: significant achievements of the past six years,

values and ideals, relationships between individuals and groups that work together, and any alignment or realignment of resources or processes that were important. The scenarios were to be technically feasible, socially viable (not violating community or legal standards), and acknowledge the relationship with other government and regulatory entities.

As each skit or dramatization was given, the members of the audience were asked to consider the following:

- What were the key themes?
- What is the role of information and communication?
- How does the presentation describe critical relationships?
- What is needed to make this future a reality? What conditions are necessary?

The future scenarios presented had various themes and overlapping hopes and wishes. Included were: a tenfold increase in the number of companions, standardized training and supervision, a nationwide computerized access system or eldercare assistance, enabling legislation which removes restrictions on payment methods for using volunteers, high program visibility, an intergenerational program component, and the use of non-stipended volunteers. In addition, the visions included having a program in every Visiting Nurse Association in the country, having many and varied organizational and funding partners, being able to use the program to provide long-term home support and services for homebound individuals of any age, and loosening restrictions to the degree that anyone could become a senior volunteer and anyone who needed a companion would be able to have one.

Task Four: Focus on Action: Creating the Necessary Conditions

Common themes identified in scenario presentations were reviewed to determine necessary conditions for the program and how to develop them. The whole group listed three necessary conditions and is-

sues which might affect the program's future. Separate small groups considered each of these items: mission and values, volunteers and raw materials, clients and funding. In each group, the specific issue was reviewed from the perspective of who needs to be involved; what information, relationships and resources are needed; what are the values and principles are, and what needs to happen.

The mission of the Senior Companion (SC) in long-term care was to support the independence of at-risk adults where they choose to live through volunteer opportunities for older persons. The values were defined as: people are better off where they want to live, volunteer service must be compassionate, client dignity must be protected, family preservation is important, client and volunteer must both receive high value, the opportunity to serve should be widely available, and the idea of older people as valued members of society needs to be supported.

The group reviewing volunteers defined the SC volunteer as a person age 55 or older who provides individualized support services and companionship to primarily frail and elderly adults and who may or may not receive a stipend. The values and principles defined for volunteers were maintaining mental health, building friendships, stipends, insurance, dignity, independence, recognition, self-esteem, career development, training, and a sense of esprit d' corps. The necessary condition needed was more evaluation research to study the values and benefits of the companions; rethinking the purpose of the stipend and looking at corollary issues such as income eligibility, funding sources, and alternative forms of incentive such as tax credits or service credits; providing for more flexibility in hours served and in income guidelines; and expanding skills and education.

In the working group discussing clients, values and vision centered on consumer empowerment and control, providing an integrated service system, and safeguarding the client-centered nature of the senior volunteer in long-term care. The group discussed using the disability model where payment is made directly to the consumer, enabling the client to choose providers and remain in control of service needs. Increased service coordination and the incorporation of senior volunteers as a part of the continuum of care were deemed necessary.

The final group focused on funding. Ideas elicited: to protect the integrity of the client-centered program, and to maintain the service; increased funding and legislative reform to expand the funding base were necessary. It was suggested that SC representatives attend the National Medicaid Waiver Conference to look at how this might work for the SCP. It was also suggested that the program attain a place on the agenda for the annual conference of the Health Insurance Association of America to inform insurers of this option. Other suggestions included building the concept into the Prospective Payment System, campaigning with the state insurance commissioners to allow benefits to cover this service, and affiliation with a home health agency to acquire reimbursement.

CONCLUSION: THE IMPACT OF
THE FUTURE SEARCH ON
SENIOR VOLUNTEERISM
The Future Search is a Viable Planning Tool for Volunteerism

The issues and planning strategies forged through the Future Search process are relevant to both volunteerism in general and senior volunteerism in particular. The broad range discussions today concerning mission, funding, economics, the social environment, and organizational relationships are critical to the future of volunteerism. With rapid changes in societal infrastructures, an unstable economy, and rising numbers of at-risk populations, the volunteer community has been and will continue to be called upon to respond. To provide the most effective volunteer service, organizations can employ consensus building planning strategies such as the future search to reach mutually satisfac-

tory conclusions about necessary directions for volunteerism.

The Future Search is a Useful Method to Bring Together Diverse Organizations

The current demands being placed on volunteer and senior volunteer organizations require resolution through group interaction and group process. There are many potential stakeholders in the production of effective community-based volunteer efforts. However, these stakeholders come from many different sectors of the community and may not have opportunities to come together to share their diverse perspectives. The egalitarian nature of the Future Search and its widely-tested principles serve this purpose effectively.

The Bringing Together of Stakeholders in a Future Search Can Start an Interactive Process Immediately

The Denver SCP future search conference demonstrated how bringing together key organizational representatives (who may not otherwise interact) to focus on a potential mutually beneficial concept can catalyze new activity immediately. At the Denver meeting, several organizational representatives made plans for follow-up meetings with other agencies based upon their interaction at the meeting. Groups that had not formerly interacted found common ground and new ideas.

The Future Search is an Educational Tool

Through group activity, diverse organizations and individuals learned about a concept in volunteerism which they may not have known about or completely understood. The Future Search afforded an opportunity to share divergent perspectives and gain some insight into opposing viewpoints. Conference participants stated their new or renewed enthusiasm for the Senior Companion in long-term care.

The Future Search is a Starting Point

Volunteerism requires commitment and energy, constant vigilance, and a lead organization or individual. The Future Search process has shown its effectiveness in sustaining that commitment and energy, and facilitating that all-important ongoing process of making plans that become realities.

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