

When Roles Change

Supporting Aging Volunteers with Compassion, Clarity, and Safety

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Where We Are Going Today

- In this session, we'll explore how volunteer managers can:
 - ✓ Recognize signs that an aging volunteer's role may be changing
 - ✓ Respond to concerns involving health, memory, mobility, communication, or judgment
 - ✓ Distinguish between situations that call for support, accommodation, reassignment, or discontinuation
 - ✓ Have supportive, direct, and respectful conversations
 - ✓ Protect the dignity of the volunteer while safeguarding the people served and the organization
 - ✓ Build a more volunteer-ready approach through documentation, role design, and compassionate decision-making

The Value Older Volunteers Bring



- Dedication and dependability
- Wisdom, perspective, and lived experience
- Strong relationships with staff, clients, residents, and families
- Institutional memory and continuity
- A deep sense of purpose and service
- Contributions that should be honored, not taken for granted

When Roles Begin to Change

- Change may happen gradually
- Concerns often show up as patterns, not isolated incidents
- The issue is not age — the issue is role fit, safety, and support
- Early recognition allows for more compassionate options
- Silence or avoidance can make the situation harder later



What Might Begin to Change

- Health or stamina
- Memory or follow-through
- Mobility or physical ability
- Communication or social cues
- Judgment, boundaries, or decision-making
- Reliability and role fit



Warning Signs – What to Watch For

- Repeated confusion about familiar tasks
- Missed shifts, late arrivals, or schedule mix-ups
- Difficulty following instructions or completing steps
- Increased frustration, withdrawal, or unusual behavior
- Safety concerns for the volunteer or others
- Feedback from staff, families, clients, or other volunteers



What Level of Response is Needed?



- Pause before reacting
- Gather specific observations
- Separate “concern” from “assumption”
- Consider support or accommodation first
- Escalate when safety, boundaries, or trust are at risk
- Match the response to the level of concern

Start with Support and Accommodation

- Ask: Can the volunteer still succeed with support?
- Clarify expectations and role responsibilities
- Adjust tasks, pace, or schedule when appropriate
- Provide reminders, checklists, or written instructions
- Pair with staff or another volunteer if helpful
- Reassess whether the accommodation is working



Reassignment with Dignity



- Reassignment is not rejection
- Focus on fit, not failure
- Preserve purpose and connection when possible
- Offer choices, not ultimatums
- Explain the reason clearly and respectfully
- Follow up after the transition

When Discontinuation May Be Necessary

- Not every situation can be resolved through support or reassignment
- Safety concerns must be taken seriously
- Repeated boundary violations may require ending service
- Continued confusion or poor judgment can create unacceptable risk
- Decisions should be based on observed behavior, not age
- End the role with compassion, clarity, and respect



Having the Conversation



- Choose a private, respectful setting
- Begin with appreciation
- Use specific observations, not labels
- Be direct, calm, and compassionate
- Listen for the volunteer's perspective
- Explain next steps clearly

What Do I Actually Say?

- “I want to talk with you about something I’ve noticed.”
- “This is not about blame — it’s about support and safety.”
- “Here are the specific concerns we’ve observed...”
- “I’d like to understand how this feels from your perspective.”
- “Let’s talk about what might help.”
- “Here is what we need to do next.”



When the Conversation Gets Difficult

- Expect emotion, defensiveness, or disagreement
- Stay calm and do not argue
- Acknowledge the volunteer's feelings
- Return to specific observations
- Recenter the conversation on support, safety, and fit
- Pause or follow up later if needed



Documenting the Concern



- Document observations, not opinions
- Include dates, times, and specific examples
- Note who was involved or who observed the concern
- Record steps taken to support or accommodate
- Keep documentation respectful and confidential
- Use documentation to guide fair decision-making

Creating Options Before There's a Crisis

- Clearly define what the role requires
- Identify which tasks are essential and which can be modified
- Build in lighter-duty or lower-risk options
- Make reassignment easier by having alternative roles ready
- Use regular check-ins to notice changing needs
- Help volunteers continue serving with dignity when possible



Building a Volunteer-Ready Approach



- Prepare before concerns arise
- Create clear role descriptions and expectations
- Schedule regular check-ins
- Develop support, reassignment, and discontinuation pathways
- Train staff to report concerns respectfully
- Make compassionate decision-making part of the culture

Case Scenario: A Volunteer Whose Role is Changing

- Long-time volunteer, highly valued by staff and residents
- Recently missed two scheduled visits
- Seems confused about sign-in and assignment process
- Became frustrated when reminded of procedures
- Staff are concerned but reluctant to “make a big deal”
- What should the volunteer manager do next?



Applying the Framework

- What did we observe?
- Is this a pattern or an isolated incident?
- What support or accommodation might help?
- Is reassignment needed?
- Is there any immediate safety concern?
- What should be documented and followed up on?



Decision Points: What Comes Next?



- Can the concern be addressed with support?
- Would accommodation make the role safer or clearer?
- Is reassignment a better fit?
- Does the concern create unacceptable risk?
- Who needs to be involved in the decision?
- What is the follow-up plan?

Policies and Practices That Help

- Written role descriptions
- Orientation and refresher training
- Regular volunteer check-ins
- A process for reporting concerns
- Documentation guidelines
- Clear pathways for support, reassignment, or discontinuation



Key Takeaways

- Start with appreciation, not assumption
- Look for patterns, not isolated moments
- Use support and accommodation when possible
- Reassign with dignity when the role no longer fits
- Act when safety, boundaries, or trust are at risk
- Lead with compassion, clarity, and confidence

Reflection

- Where are we already prepared?
- Where are we relying on informal judgment?
- Do we have clear role descriptions and expectations?
- Do staff know how to report concerns respectfully?
- Do we have options beyond “continue” or “stop”?
- What is one step we can take after today?



Questions and Discussion

- What situations are you navigating now?
- What feels hardest about these conversations?
- Where could your process be clearer?
- What support, accommodation, or reassignment options do you already have?
- What is one step you can take after today?



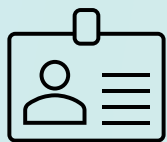
Compassion and Clarity Can Work Together

- Aging volunteers are people to be honored, not problems to be managed
- Changing roles require thoughtful leadership
- Support when possible
- Reassign when appropriate
- Act when safety requires it
- Preserve dignity at every step

Thank You



Compassion and clarity work together.



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<https://naltcv.org>



Schedule a follow-up conversation:

<https://calendly.com/pfalkowski/lets-connect>

