



The CareShare Co-op Playbook



Health

About SE Health & Acknowledgements

SE Health is a not-for-profit social enterprise with a mission to spread hope and happiness and over 115 years of history providing innovative health care solutions. As a trusted partner in home and community care, SE Health is committed to reimagining how people live and age at home. Guided by our values of love, lifecare, and work with purpose, we aim to address complex challenges that impact the health and well-being of individuals and communities.

Our decision to engage in the CareShare Co-op initiative stems from our deep understanding of the growing needs of family caregivers and older adults in Canada. Caregivers are the backbone of our health care system, yet many face significant emotional, physical, and financial challenges. We recognized the need for a practical, community-driven approach that leverages shared resources and digital tools to support caregivers and care recipients alike. The CareShare model aligns with our broader goal of enabling aging in place, fostering community resilience, and addressing systemic inequities.

This Playbook was created to share our learnings, resources, and practical guidance with organizations and communities eager to implement the CareShare Co-op model. It represents the collective efforts of many, and we are deeply grateful for the support of key partners, including PetroCanada CareMakers Foundation, whose grant enabled us to pilot this initiative, and the volunteers, caregivers, and older adults who co-designed and tested the program with us. Their insights and experiences are at the heart of this Playbook.

We hope this resource inspires and empowers others to join us in building compassionate, connected communities where caregivers and older adults thrive together.

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ABOUT THIS PLAYBOOK

The *CareShare Playbook* is a comprehensive guide designed to support organizations in implementing the *CareShare Co-op* model, an innovative program aimed at providing respite and practical support for caregivers through community collaboration. This playbook outlines the program's foundations, design, and implementation, offering actionable steps, tools, and insights from pilot experiences to enable effective delivery and scaling.

Purpose and Goals

- To address the critical challenges faced by caregivers by fostering a community-driven approach to caregiving support.
- To provide organizations with a step-by-step framework for adapting the CareShare model to their unique community contexts.
- To enable the scalability and sustainability of caregiving solutions through knowledge transfer, stakeholder engagement, and effective resource sharing.

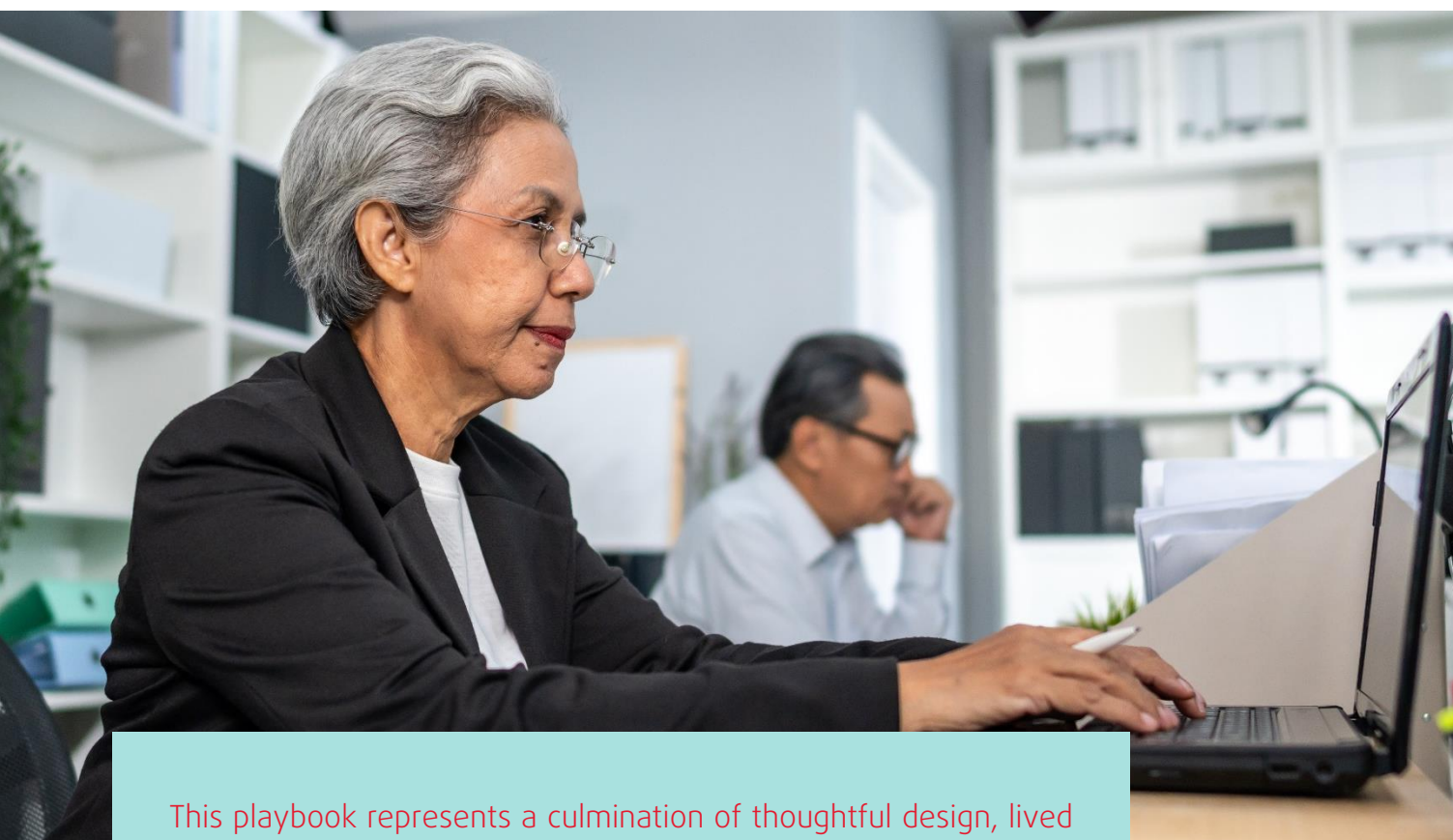
Key Components

1. **The Caregiver Landscape:** Examines the challenges and opportunities in caregiving, setting the context for CareShare's relevance.
2. **The CareShare Co-op Model:** Details the shared-economy-inspired approach, emphasizing mutual support, community engagement, and digital tools.
3. **Insights from the Pilot:** Draws from the successful pilot with a multi-cultural, faith-based community.
4. **Step-by-Step Guidance:**
 - **Step 1: Establish the Foundation:** Strategies for community assessment, defining objectives, building rewards and incentives, and leveraging technology for your program.
 - **Step 2: Define and Design:** Guidance on building a business case for support and forming partnerships.
 - **Step 3: Prepare for Program Delivery:** Focuses on engaging caregivers and care recipients, recruiting and training volunteers, and co-designing roles for successful implementation.
 - **Step 4: Evaluate and Sustain:** Best practices for monitoring outcomes, scaling the program, and gathering feedback.

Outcomes and Vision

The *CareShare Playbook* is more than a resource—it is a blueprint for creating meaningful change. By leveraging its insights and tools, organizations can:

- Enhance the quality of life for caregivers and care recipients.
- Strengthen community bonds and volunteer engagement.
- Build sustainable caregiving networks that address local needs effectively.



This playbook represents a culmination of thoughtful design, lived experiences, and a commitment to addressing the pressing challenges of caregiving. Together, we can create a future where caregiving is supported, valued, and sustainable, and where people can age in their homes with more support.

THE CAREGIVING LANDSCAPE:

CHALLENGES AND OPPORTUNITIES

Caregiving plays a critical role in Canadian society, supporting families, communities, and the economy. However, caregivers often face significant challenges that impact their mental, physical, and financial well-being. To support caregivers effectively, it is essential to understand this landscape, the care they provide, and the systemic gaps they navigate.

Who are the Caregivers?

A caregiver is defined as an unpaid family member, friend, or other support for someone who needs care due to physical, intellectual, or developmental disabilities; medical conditions; mental illness; or needs related to aging.

- 1 in 4 Canadians are caregivers today, and 1 in 2 will become one in their lifetime.¹
- The majority of caregivers (61%) are between the ages of 45–64, balancing work, personal responsibilities, and caregiving tasks.¹
- Caregivers supporting older adults spend an average of 19 hours per week on these responsibilities.²
- Caregivers dedicate 5.7 billion hours annually to caregiving, valued at \$97.1 billion, which is equivalent to 2.8 million full-time paid care providers.³

Who are the Care Recipients?

Caregivers support a range of individuals, with:

- 47% caring for parents or parents-in-law.¹
- 13% assisting spouses or partners.⁴
- 8% supporting children with long-term health conditions or disabilities.⁴
- Others care for friends, neighbours, and extended family members.



What Care is Provided?

Caregiving tasks often include:

- 84% providing transportation for errands, medical appointments, or groceries.¹
- 64% managing household tasks like meal preparation and cleaning.¹
- Many caregivers assist with daily living activities, ensuring their loved ones' basic needs are met.
- Caregivers often serve as the primary or sole companion for the person they care for, increasing the risk of loneliness and social isolation for both the caregiver and the recipient.

Key Challenges Faced by Caregivers

- 69% of caregivers report mental health deterioration, with many feeling overwhelmed or isolated.⁵
- 59% of caregivers need breaks but often lack access to affordable, flexible, and culturally sensitive respite care.⁵
- Caregiving contributes to an annual \$1.3 billion loss in productivity, as caregivers juggle work and family responsibilities.⁵
- Caregivers face difficulty navigating fragmented systems, often repeating their stories across multiple service providers.²

Gaps in Caregiver Support

Despite their critical role, caregivers face systemic gaps:

- **Limited Accessibility:** Caregivers struggle to access respite and support services due to strict regulations on publicly funded hours and limitations on permitted tasks. Financial barriers also make hiring private support challenging.
- **Recognition & Respect:** Despite their essential role, caregivers often receive little societal acknowledgment for their contributions.
- **Culturally Inclusive Care:** Many caregivers lack access to culturally relevant support services tailored to diverse communities.
- **Workplace Accommodations:** There are few policies that allow caregivers to effectively balance work and caregiving responsibilities.

Caregiving, Aging, and Chronic Illness

Caregiving, aging, and chronic illness significantly increase the risk of social isolation and loneliness, which can lead to poor mental and physical health outcomes.⁶ Older adults and caregivers often experience reduced social participation due to mobility challenges, caregiving responsibilities, and emotional strain, heightening their risk of depression, cognitive decline, and burnout². Twenty-four percent of older adults report feeling socially isolated, a number that increases for those with chronic conditions and mobility limitations.¹

Addressing Isolation through Intergenerational Connection

Programs that foster intergenerational engagement can reduce isolation while improving mental well-being and social connectedness. Research shows that intergenerational interactions provide emotional support, a sense of purpose, and stronger social ties for both older and younger individuals.⁷ By encouraging volunteer-based engagement, social activities, and respite support, initiatives like CareShare can play a key role in reducing caregiver and senior isolation while strengthening community connections. Recognizing caregiving and aging as critical risk factors for isolation is essential for developing inclusive, community-driven interventions that promote social support and well-being.

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THE CARESHARE CO-OP MODEL

The CareShare Co-op is an innovative program designed to provide free, practical support and respite to family caregivers. By tapping into the shared-economy model, leveraging digital tools and offering an incentive structure CareShare mobilizes community members to assist caregivers, fostering a supportive environment where care responsibilities are shared. This approach not only alleviates the burden on caregivers but also strengthens community bonds.

Key Features

- **Mutual Support Network:** Caregivers and volunteers (known as *CareShare Ambassadors*) exchange services, creating a sustainable ecosystem of care.
- **Digital Coordination Platform:** The program integrates with the Tuktu Care app, allowing users to request and track services, log volunteer hours, and manage scheduling efficiently.
- **Incentives and Rewards:** Volunteers accumulate time credits and receive rewards for their contributions, enhancing engagement and retention.
- **Community-Driven:** Built around principles of co-design with local communities, ensuring culturally appropriate and inclusive caregiving solution.



How It Works



1. Volunteer Onboarding:

Community organizations will train and support CareShare Ambassadors, ensuring volunteers are equipped to assist caregivers safely and effectively.



3. Rewarding Participation:

Volunteers earn points or time (e.g., visit count), redeemable for rewards to encourage ongoing participation.



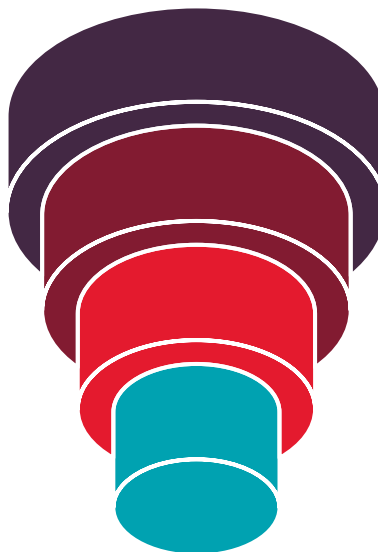
2. Digital Matching:

Caregivers connect with CareShare through trusted community organizations, submitting requests via a digital platform to match with trained volunteers.



4. Driven by the Community:

Regular evaluations and community feedback ensure the program stays responsive to the needs of caregivers, volunteers, and partners.



Impact Highlights

- **Reduced Caregiver Stress:** By sharing caregiving tasks, families experience less strain, resulting in better health and well-being for caregivers.
- **Stronger Community Ties:** The model promotes intergenerational collaboration and community resilience.
- **Scalable and Replicable:** CareShare is designed to be adaptable across different cultural and community contexts, making it an ideal solution for various organizations and settings.

THE CARESHARE CO-OP PILOT

The CareShare Co-op pilot was designed to address critical gaps in caregiver respite, particularly for seniors and their family caregivers, by leveraging the strengths of a multicultural, faith-based community. This community, rooted in values of *seva* (selfless service) and collective care, provided an ideal foundation for piloting a program that emphasized volunteerism, inclusivity, and community-driven solutions.

Community Context

The urban community situated in the Greater Toronto Region had a pre-existing visitation program with its own established administrative systems, which were leveraged to support the CareShare Co-op pilot. These systems facilitated communication, coordinated logistics, and provided a strong operational foundation. The community's longstanding tradition of volunteerism and familiarity with caregiving support further aligned with the pilot's goals, fostering trust and seamless integration.

Participants

The program supported seniors living in residential buildings with high concentrations of older adults. Many seniors relied on the program for companionship and practical support, which helped alleviate social isolation. For family caregivers, the program offered much-needed respite and resources, reducing stress and enhancing their ability to provide care.

Volunteer Network

A robust, committed volunteer network was a cornerstone of the program's success, comprising three key groups:

- **CareShare Ambassadors** conducted visits, providing companionship, playing games, and offering light technology support.
- **CareShare Super Users** were community champions who acted as both ambassador and caregiver liaisons, ensuring smooth coordination.
- **Administrators** managed logistics, communication, and program oversight.

Many volunteers had prior caregiving experience, particularly supporting seniors during the COVID-19 pandemic, allowing them to adapt quickly to program requirements and meet the diverse needs of seniors and caregivers. Their dedication fostered meaningful interactions and strengthened community trust in the initiative.



ADAPTING THE CARESHARE CO-OP TO THIS COMMUNITY

Activities for Volunteers

Volunteers engaged in activities that were meaningful and practical, such as:

- Companionship
- Playing games or reading together
- Watching TV
- Helping with light technology support
- Managing small errands (e.g., mail pickup)

These activities were designed to promote positive interactions while avoiding tasks like personal care or medical support, and avoiding any activities that created a liability risk (rides to appointments, or to run errands, walking dogs, going for a walk in the community, etc.)

We were able to limit the options available to seniors and caregivers on Tuktuk to these activities.

Language Tailored to the Community

We tailored our language to the community by using familiar terms to foster trust, cultural alignment, and deeper engagement. This ensured the program resonated with the community's values and traditions.



Recognition and Incentives Program

A tiered rewards system was implemented to maintain volunteer engagement and morale:

- **Welcome Package:** Volunteers received a resource guide and a small token of appreciation upon signing up.
- **Milestone Recognition:** Volunteers were rewarded with gift cards at key visit milestones to acknowledge their ongoing commitment.
- **Pilot Completion:** Volunteers received a Certificate of Completion and were entered into prize draws based on their level of participation.

Why This Recognition Program?

- **Sustainability:** Milestone-based rewards encouraged ongoing participation while avoiding dependency on excessive material incentives.
- **Alignment with Values:** The program reflected the community's *seva* (ethos of service) while showing genuine appreciation for volunteers' contributions.
- **Practicality:** Gift cards and certificates were chosen for their ease of distribution and universal appeal, making them effective yet manageable incentives.
- **Scalability:** The model was designed to be easily adapted for future pilots and scalable to other communities with minimal changes.


THE CARESHARE CO-OP PILOT:

LESSONS LEARNED

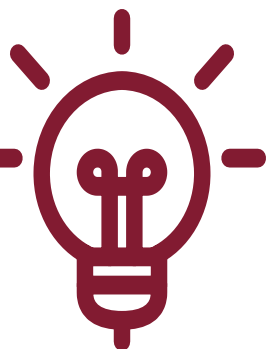
The *CareShare Co-op Pilot* provided valuable insights into implementing a sustainable, community-driven respite program. This section captures key lessons learned across different phases of the pilot, offering guidance for organizations looking to replicate or adapt the model to their own contexts. The structure of this section mirrors the journey of the pilot—from conceptualization to long-term sustainability—highlighting both successes and areas for refinement.

Establish the Foundation

The program was co-designed in partnership with community stakeholders to ensure alignment with values, needs, and existing infrastructures. Lived experience interviews with caregivers provided crucial insights into barriers to respite care, while multi-stakeholder discussions validated the program's feasibility and clarified shared objectives.

- 
- The community's history of volunteer-led visitation programs provided a strong foundation. Established community leaders played a crucial role as liaisons between volunteers and seniors, facilitating communication and ensuring alignment with cultural values.
 - To ensure accessibility, the program integrated multilingual support, adapting communication strategies to meet linguistic needs.
 - A mix of monetary and non-monetary incentives (e.g., public recognition, certificates, and community gatherings) was essential for retaining volunteers. Early funding allocation for incentives proved crucial.
 - The community had significant concerns about privacy, risk, and the appropriateness of digital tracking and feedback features. The Tuktū platform alleviated these concerns by allowing for customization, ensuring only relevant activities were included, and providing a secure, closed-loop system that aligned with community values.
 - Volunteers initially expected to receive feedback through the app, but the community felt app-based ratings did not align with their values. Instead, they established direct feedback loops, where program champions personally called seniors to gather qualitative insights after visits, fostering trust and a more personal evaluation process.

Recommendations



- Expand co-design opportunities by engaging a broader range of stakeholders early, including caregivers and seniors, to improve buy-in and increase program uptake.
- Clearly define program objectives that resonate with community needs and communicate these goals transparently to stakeholders.
- Establish champions or “super users” within the community who can foster trust and ensure smooth implementation.
- When integrating technology, ensure privacy, risk, and community preferences are addressed by co-designing platform use processes that align with participant needs.

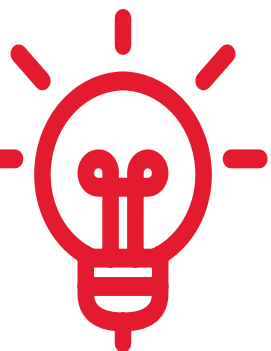
Define and Design

Beyond establishing the foundation, securing funding, developing a sustainable budget, forming strong partnerships, and establishing clear agreements were essential for the pilot’s success.



- To secure funding and partnerships, we developed a case for support that combined quantitative data (e.g., statistics on caregiver burden) with qualitative insights (e.g., lived experience stories from caregivers and seniors). This dual approach made the need for respite care more compelling to funders and partners.
- A comprehensive budget was developed, accounting for monetary incentives, training materials, technology integration, and operational costs. Additionally, we worked with multiple partners to secure in-kind contributions and non-monetary incentives (e.g., mental health supports, volunteer recognition, certificates, and training spaces), ensuring long-term engagement without reliance solely on financial incentives.
- We collaborated with funders, research institutions, and technology providers to ensure a well-rounded program. Beyond financial support, partnerships provided technical expertise, research validation, and scalability options.
- Memorandums of Understanding (MOUs) were developed early to clarify roles, expectations, and commitments. This was critical in ensuring that all partners, including funders, community organizations, and technology providers, aligned with the program’s long-term vision.

Recommendations



- Use both data and personal narratives when developing a case for support to make the need for respite care more compelling to funders and partners.
- Develop a budget that includes both financial and in-kind resources, ensuring sustainability beyond initial funding.
- Engage strategic partners who can provide funding, technology support, research validation, and program expansion opportunities.
- Prepare MOUs early to clarify commitments, prevent misalignment, and ensure all stakeholders understand their roles in the program's implementation and future growth.

Prepare for Program Delivery

The program's success depended on effective volunteer onboarding, clear role expectations, structured scheduling, and robust training methods. While volunteers adapted well to the Tuktu platform, seniors required additional support to engage with the digital tools.

- In the smaller pilot community, limited volunteer availability made on-demand scheduling challenging. To address this, administrators coordinated pre-scheduled visits, ensuring reliability and minimizing logistical issues for both seniors and volunteers.
- The program attracted a highly motivated group of volunteers who performed best when they had structured guidance on their responsibilities, boundaries, and expectations.
- Both formal (flyers, community presentations) and informal (word-of-mouth, faith-based engagement) strategies were essential for recruiting older adults, caregivers, and volunteers. Champions played a critical role in personal outreach and relationship-building.
- Ensuring participant data protection and safe volunteer-senior interactions was a key focus. Clear protocols and safeguards were implemented to maintain program integrity.



Recommendations



- Leverage community champions to enhance recruitment efforts through direct engagement and trust-building.
- Expand scheduling models, including pre-set visit times, to accommodate communities with limited volunteer availability.
- Refine training methods by incorporating lessons learned from different formats, ensuring all participants receive targeted and effective support.
- Work closely with communities to continuously refine approved services, ensuring alignment with cultural values, practical needs, and participant expectations.
- Provide tailored support for seniors using digital tools, such as one-on-one tech guidance from volunteers during initial visits.
- Continue prioritizing privacy and safety by refining risk management protocols and safeguarding participant data.

Evaluate and Sustain

To ensure continuous improvement and long-term sustainability, the program relied on regular feedback loops, data-driven decision-making, and ongoing stakeholder engagement. Champions played a key role in maintaining trust and responsiveness through direct outreach and qualitative assessments.



- Personalized Feedback Collection Built Trust: Instead of relying on in-app feedback mechanisms, champions conducted direct phone calls with seniors and caregivers, ensuring that feedback was gathered in a culturally appropriate and relationship-driven manner. This approach helped participants feel heard and increased trust in the program.
- Data Tracking Strengthened Program Management: Metrics such as volunteer hours, service numbers, and participant engagement levels were monitored to assess program impact and inform incentive strategies for volunteer retention.

- Strategic Planning for Long-Term Sustainability: Stakeholders actively explored long-term funding models and scalability strategies to ensure the program could continue with minimal administrative burden while maintaining its core mission.

Recommendations

- Use in-app feedback mechanisms within the Tuktu platform to complement direct feedback methods and provide real-time data for program leads.
- Track key milestones, such as volunteer hours and service numbers, to measure program impact and refine sustainable incentive structures.
- Continue champion-led, personalized feedback loops to strengthen community trust and ensure responsiveness to participant needs.
- Engage stakeholders in discussions on long-term funding models and scalability, focusing on reducing administrative burdens while expanding service reach.



STEPS TO IMPLEMENTING A SUCCESSFUL CARESHARE CO-OP



Step 1

Establish the Foundation

1. Assessing the Community's Needs
2. Adapting the CareShare Model for your community
3. Defining Program Objectives and Metrics
4. Assessing Readiness for Implementation
5. Designing a Sustainable Rewards and Recognition Model
6. Leveraging Technology



Step 2

Define and Design

1. Building a Case for Support
2. Developing a Comprehensive Budget
3. Developing Partnerships and Stakeholder Mapping
4. Preparing a Memorandum of Understanding



Step 3

Prepare for Program Delivery

1. Planning Program Flow
2. Co-Designing Roles and Responsibilities
3. Recruiting Seniors and Caregivers
4. Screening and Selecting Volunteers
5. Onboarding and Training Volunteers
6. Assessing and Managing Risk
7. Monitoring Program Delivery



Step 4

Evaluate and Sustain

1. Measuring Success
2. Collecting Feedback
3. Analyzing the Data
4. Facilitating Feedback Sessions
5. Sharing Key Findings
6. Building Long-Term Sustainability



STEP 1: ESTABLISH THE FOUNDATION

This section provides the initial steps for implementing the CareShare program in a new community. By laying a strong foundation, you ensure that the program is well-aligned with local needs, establishes clear objectives, and creates a roadmap for measurable success.

Why This Matters

- Establishing a strong foundation ensures the program is tailored to the community's unique needs and challenges, fostering acceptance and engagement.
- It sets a clear direction for program development, enabling all stakeholders to work toward shared goals with clarity and purpose.
- Proper groundwork minimizes risks and creates a framework for measurable success, ensuring the program's long-term sustainability and impact.

Key Actions

- Assessing the Community's Needs
- Adapting the CareShare Model for your Community
- Defining Program Objectives and Metrics
- Assessing Readiness for Implementation
- Designing a Sustainable Rewards Model
- Leveraging Technology for Caregiver Support





Expected Outcomes

- A customized CareShare model that reflects the unique needs and values of the community.
- Comprehensive community needs assessment with identified gaps and opportunities.
- A partnership readiness report that highlights strengths and areas for development.
- Clearly defined program objectives and metrics to guide implementation and evaluation.
- A completed logic model that outlines the inputs, activities, expected outputs, and anticipated outcomes of the program.
- A detailed monitoring and evaluation plan to track progress and outcomes.
- Initial stakeholder and community engagement that establishes trust and readiness for program launch.
- A comprehensive rewards and recognition framework that aligns with community values, is sustainable and enhances volunteer engagement.
- A tailored technology plan that ensures seamless coordination and accessibility for users.

Tools & Resources

- Lived Experience Discussion Guides ([See Appendix](#))
- Canadian Mental Health Association Ontario. [Assessing Community Needs and Resources](#)
- Sample Logic Model – CareShare Pilot ([See Appendix](#))
- Environment and Climate Change Canada. [Writing SMART Objectives](#)
- MIT D-Lab. [Readiness checklist: Evaluating governance, staffing, and resource allocation.](#)
- What to Look for in a Digital Platform ([See Appendix](#))
- Video: [Discover Tuktū: Revolutionizing Home Care with AI](#)
- Tuktū (for caregivers and older adults) [Google Play](#) or the [App Store](#)
- Tuktū Provider (for Volunteers) from [Google Play](#) or the [App Store](#)



ASSESSING COMMUNITY NEEDS

Conducting a thorough evaluation of caregiving needs, resources, and gaps within a community is a critical step in designing a program that aligns with local priorities. This process not only ensures relevance but also lays the groundwork for meaningful impact and effective implementation.

Why This Matters

- Understanding community needs ensures the program addresses real challenges and maximizes its relevance.
- A comprehensive needs assessment helps identify existing resources and avoids duplication of efforts.
- It builds a foundation for strategic decision-making and successful program implementation.

Key Actions

1. Define the Scope of the Assessment:

- Determine the key objectives of the assessment (e.g., identifying caregiver challenges, mapping available resources, outlining the services that can be offered by volunteers, etc.).
- Decide on the geographic area and population groups to focus on.
- Establish a timeline and allocate resources for conducting the assessment.

2. Collect Data from Diverse Sources:

- Conduct surveys or interviews with caregivers, care recipients, and community members.
- Use focus groups to gather qualitative insights into caregiving challenges and preferences.
- Conduct 3-5 interviews with lived experience (caregivers) to help understand the nuance of the data collected through the surveys and focus groups.



- Review existing reports, databases, and resources relevant to caregiving in the community.

3. Analyze Data and Identify Gaps:

- Determine the key objectives of the assessment (e.g., identifying caregiver challenges, mapping available resources, outlining the services that can be offered by volunteers, etc.).
- Decide on the geographic area and population groups to focus on.
- Establish a timeline and allocate resources for conducting the assessment.

4. Engage Stakeholder in the Assessment Process:

- Involve community leaders, organizations, and potential partners to ensure inclusivity.
- Use co-design workshops to validate findings and gather additional perspectives.
- Share preliminary insights to build trust and encourage stakeholder buy-in.

Expected Outputs

- A comprehensive report summarizing caregiving needs, resource gaps, and community priorities. Use examples of people in the community who can benefit from the program to illustrate the human impact of the CareShare program.
- A community asset map highlighting existing support structures and potential partnerships.
- Identified key focus areas for program design and resource allocation.
- Stakeholder feedback and validation of assessment findings.

Tools & Resources

- Lived Experience Discussion Guides ([See Appendix](#))
- Canadian Mental Health Association Ontario. [Assessing Community Needs and Resources](#)



Tips & Tricks

- Engage a diverse range of voices to ensure the assessment captures varied experiences and needs.
- Leverage reports, studies, and databases to complement primary data collection.
- Share initial insights with stakeholders to build trust and encourage feedback.
- Ensure the assessment process is impartial and data-driven to maintain credibility.
- Be ready to adapt your approach based on unexpected findings or challenges.



ADAPTING THE CARESHARE MODEL TO YOUR COMMUNITY



1

This section focuses on tailoring the CareShare program to meet the unique needs and characteristics of a community. Adapting the model ensures that it aligns with local values, addresses specific challenges, and maximizes engagement and impact.

Why This Matters

- Community-specific adaptations foster inclusivity and relevance, ensuring the program's success.
- Tailoring the model builds trust with stakeholders and encourages participation.
- A well-adapted program creates a foundation for sustainability and scalability.

Key Actions

1. Understand Core CareShare Principles:

- Familiarize yourself with the foundational principles of CareShare: shared economy, mutual support, and volunteerism.
- Highlight how these principles can address caregiving challenges within your community.

2. Engage Local Stakeholders and Existing Programs:

- Conduct one-on-one meetings or workshops with community leaders, caregivers, and other stakeholders.
- Consider which programs already exist and can be adapted/enhanced to leverage the CareShare Co-op Model.
- Gather insights into community values, cultural norms, and logistical considerations.
- Build relationships that encourage active participation and co-design.

3. Assess Capacity for Roles:

- Evaluate the capacity of both volunteers and other contributors, such as program coordinators, community leaders, and support staff (from existing programs or other) and how they can be reallocated for the CareShare Co-op.
- Identify training or resources needed to fill any gaps in capacity.
- Ensure roles are clearly defined and matched to the skills and availability of participants.



- A community-aligned CareShare framework that integrates local insights and priorities.
- A list of services volunteers can provide during visits.
- Increased buy-in and for the program's implementation phase.

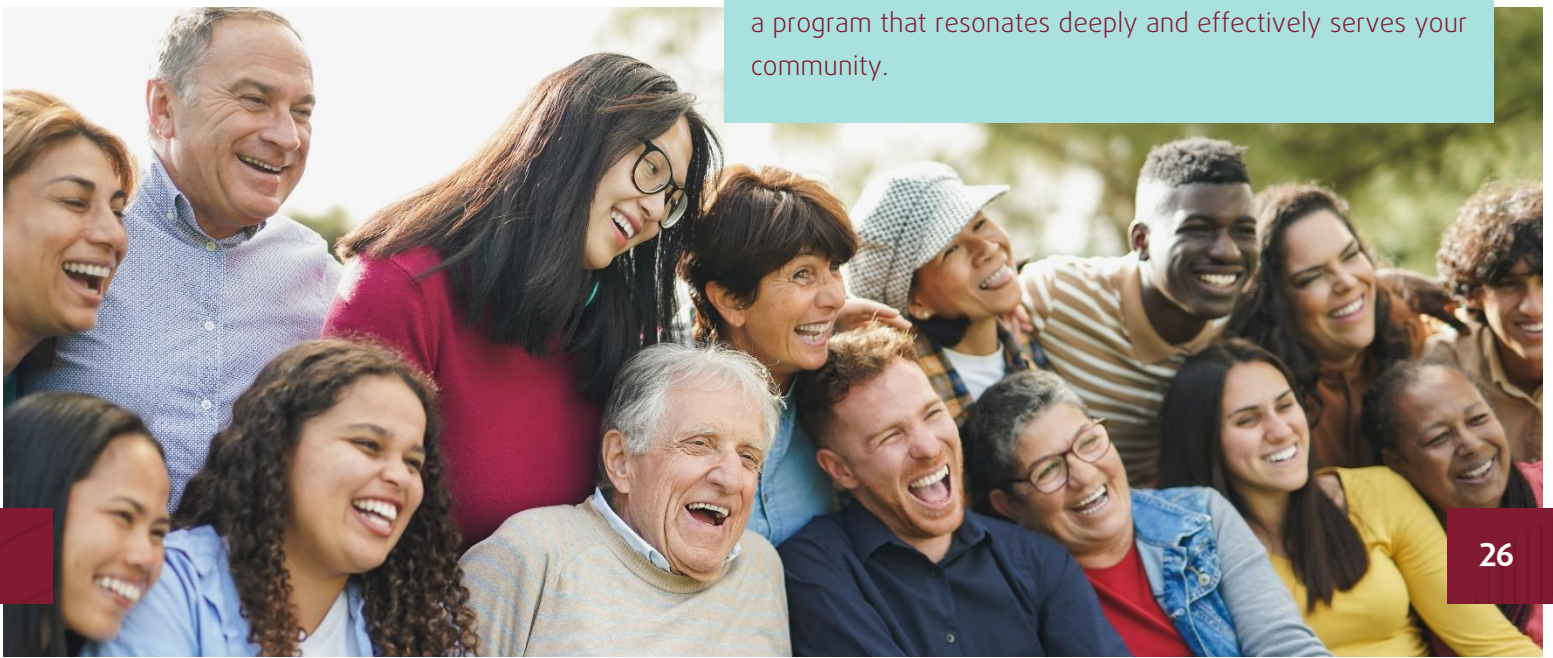


Tips & Tricks

- Prioritize understanding community needs and perspectives during stakeholder engagements.
- Keep detailed notes from meetings and assessments to ensure insights are captured and can guide adaptations.
- Engage stakeholders from the outset to build ownership and trust.
- Adapt plans based on feedback and emerging insights to remain responsive to community dynamics.
- Communicate and show the community how you've changed or adapted things to respond to their feedback. Equally important is to explain if you have considered input and determined not to change anything because it wasn't feasible.

Adapting vs. Adopting

Adopting replicates the CareShare model as-is, which may not suit your community's unique needs. Adapting customizes the model to align with local values, resources, existing programs, and demographics. Focus on tailoring volunteer recruitment, communication, services offered and sustainability to create a program that resonates deeply and effectively serves your community.



DEFINE PROGRAM OBJECTIVES AND METRICS



1

Establishing clear objectives and metrics for your CareShare program is critical for ensuring alignment with community needs, enabling effective monitoring, and demonstrating the program's impact.

Why This Matters

- Clear objectives provide direction and purpose, ensuring that all activities contribute to shared goals.
- Metrics enable the measurement of progress and effectiveness, facilitating data-driven decision-making.
- Defining objectives and metrics builds accountability and fosters stakeholder confidence.

Key Actions

1. Define Clear Program Objectives:

- Align objectives with identified community needs and priorities.
- Ensure objectives are specific, measurable, achievable, relevant, and time-bound (SMART).
- Focus on both short-term outcomes (e.g., volunteer recruitment) and long-term impacts (e.g., caregiver well-being).

2. Develop a Metrics Framework with an Integrated Logic Model:

- Identify key performance indicators (KPIs) that reflect program goals (e.g., hours of respite provided, caregiver satisfaction scores).
- Integrate a logic model into the metrics framework to visually link inputs, activities, outputs, and outcomes.
- Use the integrated framework to ensure alignment between program components and objectives.
- Plan for regular data collection and reporting intervals.

3. Engage Stakeholders in Objective Setting:

- Collaborate with community leaders, caregivers, and volunteers to ensure objectives reflect diverse perspectives.
- Use workshops or meetings to validate proposed objectives and metrics.



- Foster a sense of ownership by involving stakeholders in the decision-making process.

4. Create an Evaluation Plan

- Outline methods for collecting, analyzing, and reporting data.
- Assign responsibilities for monitoring and evaluation tasks.
- Incorporate feedback mechanisms to refine objectives and metrics as needed.

Expected Outputs

- A documented set of SMART objectives aligned with community needs.
- A comprehensive metrics framework with an integrated logic model covering key performance indicators.
- Stakeholder validation of objectives and metrics.
- A detailed evaluation plan, including data collection tools and reporting schedules.

Tools & Resources

- [A Guide for Crafting Clear and Actionable SMART Objectives.](#)
- Sample Logic Model – CareShare Pilot ([See Appendix](#))



Tips & Tricks

- Ground your objectives in a thorough understanding of the specific needs and priorities of your community.
- Include both immediate, actionable outcomes (e.g., volunteer recruitment) and broader impacts (e.g., enhanced caregiver well-being).
- Create a visual framework linking inputs, activities, outputs, and outcomes to maintain coherence between different program elements.
- Choose key performance indicators (KPIs) that reflect meaningful progress, such as hours of respite provided or participant satisfaction levels.
- Co-design objectives and metrics with input from caregivers, community leaders, and volunteers to foster ownership and ensure diverse perspectives are reflected.
- Utilize digital tools for data collection, visualization, and reporting, ensuring the metrics are accessible and actionable for all stakeholders.

ASSESSING READINESS FOR IMPLEMENTATION



1

Readiness assessments ensure that the community and potential collaborators are aligned with CareShare's mission and have the capacity to contribute effectively. This process reduces risks, clarifies expectations, and builds trust between CareShare and its partners. Using structured tools, organizations can identify strengths and gaps in governance, staffing, and resource allocation. This helps prioritize engagement and create development pathways for partners needing additional support.

Why This Matters

- Ensures alignment between community goals and CareShare's mission.
- Builds trust and fosters transparency in collaborations.
- Reduces risks by identifying potential gaps in governance, capacity, or resources.
- Supports the development of tailored engagement plans to strengthen partnerships.

Key Actions

1. Assess Key Areas of Readiness

- Governance to ensure leadership alignment and commitment to CareShare's mission.
- Staffing and capacity to identify if the organization has the personnel and volunteer networks necessary to support the program.
- Resource allocation to evaluate financial and in-kind contributions, such as venues or technology platforms.
- Determine whether your community requires a digital coordination platform and, if so, evaluate different options. While the pilot used Tuktū, organizations should assess their needs, privacy requirements, and user preferences before selecting a tool.

2. Identify High-Potential Partners

- Flag areas needing support and tailor engagement approaches based on assessment results.

3. Facilitate Collaborative Sessions

- Discuss assessment findings with CareShare leads and partners.
- Encourage transparency and joint problem-solving to address gaps and foster shared ownership.





4. Prioritize and Segment Partnerships

- Ready to engage: Strong alignment in mission, capacity, and resource availability.
- Capacity-building stage: Aligns with mission but needs training, resource-sharing, or phased involvement.
- Long-term engagement: Needs significant development but could play a future role in program scaling.

5. Develop Tailored Development Plans

- Create customized plans for partners not immediately ready to participate.

Expected Outputs

- Clear understanding of partner strengths and gaps.
- Improved partner alignment with CareShare's mission and goals.
- Tailored development plans for capacity-building.
- Strengthened trust and transparency among collaborators.

Tools & Resources

- MIT D-Lab. *Readiness checklist: Evaluating governance, staffing, and resource allocation.*



Tips & Tricks

- Encourage open dialogue to create a safe space for partners to share strengths and limitations
- Invest in capacity-building as an opportunity, not a barrier, viewing gaps as chances for growth
- Flexible engagement models by allowing partners to start with limited roles and expand as their capacity grows
- Reinforce feedback loops by gathering regular feedback from partners to refine engagement strategies and address emerging needs.

DESIGNING A SUSTAINABLE REWARDS AND RECOGNITION MODEL



1

A differentiating feature of the CareShare Co-op is its innovative rewards and recognition system, setting it apart from other volunteer-based support models and apps. By prioritizing structured incentives and appreciation, CareShare fosters sustained volunteer engagement, motivation, and long-term retention. A well-designed milestone-based rewards system celebrates key achievements and contributions, ensuring volunteers feel valued while reinforcing their alignment with program goals.

Why This Matters

- Encourages consistent participation by recognizing volunteers' efforts over time.
- Builds morale and fosters a sense of community through public acknowledgment and celebrations.
- Reinforces the value of volunteer contributions, aligning their efforts with the program's mission and objectives.
- Helps retain volunteers by providing meaningful incentives and opportunities for growth.
- Opportunity for corporate or business involvement to support community building in their local area.

Key Actions

1. Define Milestones

- Facilitate discussions with the community on potential rewards and recognition strategies.
- Identify clear criteria for key achievements based on hours contributed, tasks completed, or program milestones.
- Communicate milestones and associated rewards clearly to all volunteers.

2. Track and Monitor Progress

- Use digital tracking tools for volunteers to log hours and achievements.
- Schedule regular check-ins to monitor progress and recognize contributions.

3. Develop a Rewards System

- Offer a mix of tangible and intangible rewards such as gift cards or public recognition.



- Consider different rewards models including points per time and/or accumulated points
- Ensure rewards are scalable and adaptable to different levels of commitment.
- Align rewards system to reflect the in-kind or discounted options that can be provided by local organizations, businesses or corporations.

4. Incorporate Feedback Loops

- Gather volunteer feedback on the rewards system to ensure relevance and effectiveness.
- Adjust the rewards system based on feedback to meet evolving needs.

5. Extend Recognition Beyond Rewards

- Highlight contributions in team meetings, social media, and peer recognition platforms.

Expected Outputs

- Increased volunteer engagement and satisfaction.
- A transparent and equitable rewards system.
- Reduced volunteer turnover and higher retention rates.
- Improved alignment between volunteer efforts and program goals.

Tools & Resources

- Sample Rewards Plan – CareShare Co-op Pilot ([See Appendix](#))




Tips & Tricks

- Be transparent by clearly communicating rewards criteria and timelines to volunteers.
- Foster flexibility by offering a variety of reward options to appeal to diverse volunteer preferences.
- Collaborate locally with businesses to sponsor rewards and strengthen community ties
- Encourage input from volunteers to enhance the rewards structure and ensure buy-in
- Focus on sustainability by allocating dedicated funds and partnerships to support long-term success.

In the CareShare Co-op pilot, we utilized the Tuktu platform to facilitate digital coordination between caregivers and volunteers. While Tuktu offered a structured way to manage visits and track activities, organizations implementing CareShare should assess their own needs, available resources, and existing digital solutions to determine the best fit. Other digital tools may be suitable depending on community preferences, security requirements, and integration capabilities.

Why This Matters

- 
- Real-time data tracking enables program expansion, ensuring impact measurement and continuous improvement.
 - A closed-loop system restricts access to designated community members, ensuring safety and exclusivity.
 - The platform is customized to meet community needs, ensuring equitable access and usability.
 - The dashboard provides real-time insights, optimizing caregiver engagement and volunteer effectiveness.

Key Actions

1. Establish your community on a digital platform

- Identify key caregiving challenges, such as volunteer matching, service gaps, and training needs.
- Integrate your community's list of approved activities for volunteer visits with the platform.
- Establish a program support team.

2. Develop an Implementation Roadmap

- Establish a phased rollout plan, including a transition from initial implementation to full-scale deployment.
- Define key milestones and a feedback loop for process refinement.
- Integrate training sessions for program coordinators and volunteers to ensure smooth adoption.

3. Train Program Support Teams

- Establish a “super-user” model with designated leads supporting caregivers and volunteers. Provide tailored training on your chosen platform’s functionalities, including service requests, scheduling, and reporting.
- Offer support resources such as FAQs, how-to guides, and live demo sessions.
- Develop a volunteer recognition model to sustain engagement and motivation.

Expected Outputs

- A system that supports privacy and trust within the community.
- A digital platform that supports program coordination and cross-community adoption.
- Real-time tracking enhances impact measurement and service optimization.
- Volunteers are equipped with the necessary skills and resources to succeed.

Tools & Resources

- What to Look for in a Digital Platform ([See Appendix](#))
- [Discover Tuktū: Revolutionizing Home Care with AI](#)
- Tuktū (for caregivers and older adults) [Google Play](#) or the [App Store](#)
- Tuktū Provider (for Volunteers) from [Google Play](#) or the [App Store](#)



Tips & Tricks

- Involve caregivers, volunteers, and community leaders early in the process to align platform features with real-world needs.
- Prioritize comprehensive training for program support teams to ensure smooth operations and effective troubleshooting.
- Ensure the platform accommodates diverse cultural and regional needs for equitable access and usability.
- Pilot the platform in a controlled setting to gather user feedback and refine features before full-scale deployment.
- Regularly monitor platform usage and program outcomes to make informed adjustments and improvements.
- Develop a plan for ongoing training and support, enabling program sustainability and scalability over time.





STEP 2: DEFINE AND DESIGN

This section focuses on defining and designing the infrastructure needed to implement the CareShare program effectively. By thoroughly planning this phase, you ensure that the program is feasible, scalable, and aligned with the goals of both the community and stakeholders.

Why This Matters

- Defining and designing the program ensures that all elements are practical and achievable, creating a solid framework for success.
- It strengthens stakeholder buy-in by incorporating their input into critical components like funding, partnerships, and technology.
- Thoughtful design fosters a sustainable program that can adapt to future needs and challenges.

Key Actions

- Building a Case for Support
- Developing a Comprehensive Budget
- Developing Partnerships and Stakeholder Mapping
- Preparing a Memorandum of Understanding



Expected Outcomes

- A robust business case that secures funding and articulates the program's value proposition.
- Stakeholder maps and partnership plans that identify roles, responsibilities, and synergies.
- Signed memorandums of understanding (MOUs) that clearly define agreements with all participating organizations.
- An implementation roadmap that connects design elements to measurable outcomes.

Tools & Resources

- Sample CareShare Co-op Business Case Presentation Deck ([See Appendix](#))
- Hardy, M. (2020). [It's Time to Do Stakeholder Mapping Differently](#). Tamarack Institute
- Outreach Plan Checklist ([See Appendix](#))
- MIT D-Lab. [*Readiness checklist: Evaluating governance, staffing, and resource allocation.*](#)
- Components of a Memorandum of Understanding ([See Appendix](#))
- What to Look for in a Digital Platform ([See Appendix](#))
- Sample Rewards Plan – CareShare Co-op Pilot ([See Appendix](#))

This section highlights the strategic approach to securing financial support for impactful initiatives like CareShare. It involves articulating the program's value proposition, aligning its goals with funder priorities, and showcasing evidence-based results to gain stakeholder buy-in and entice potential partners. By emphasizing outcomes such as economic efficiencies, societal impact, and innovation, this case demonstrates why CareShare is a valuable investment.

Why This Matters

- Secures sustainable funding by aligning with funder priorities and demonstrating value.
- Enables expansion to meet caregiver needs across diverse communities.
- Highlights measurable impact with clear societal benefits like improved caregiver well-being, aging in place supports and cost savings.
- Builds stakeholder confidence through transparency, accountability, and a solid strategy.
- Promotes innovation with forward-thinking solutions like shared-economy principles and digital tools.

Key Actions

1. Define the Problem (Case for Change)

- Use up-to-date metrics and data on caregiver needs.
- Highlight gaps in existing respite services through local caregiver assessments and storytelling narratives.
- Identify the social isolation and loneliness rates in your community, or indications of how many people are at risk.

2. Present the Solution (CareShare Co-op Model)

- Showcase how CareShare connects volunteers with caregivers to provide respite services (companionship, errands, etc.).
- Emphasize technology integration (e.g., Tuktu Connect) for streamlined volunteer matching, service delivery and efficiency for scaling the program.
- Align the model with national strategies like the National Caregiver Strategy.



3. Outline Needs (Transparent Ask)

- Provide a budget breakdown of program costs.
- Clearly state the funding request and explain how contributions will drive success.

4. Demonstrate Impact (ROI and Outcomes)

- Leverage pilot data to showcase quantitative outcomes.
- Calculate the social return on investment (SROI) to highlight community benefits.
- Emphasize long-term benefits, such as reduced caregiver burnout, strengthened community ties and enabling people to age at home longer.

Expected Outputs

- A clear and compelling business case aligning with funder priorities.
- Key themes and actionable insights derived from pilot data and caregiver assessments.
- A transparent and detailed budget that highlights funding needs.
- Increased interest and investment in CareShare to support caregivers and communities.

Tools & Resources

- Sample CareShare Co-op Business Case Presentation Deck ([See Appendix](#))



Tips & Tricks

- Use evidence-based data to anchor your case with validated information on caregiver needs and outcomes.
- Engage stakeholders early by involving caregivers, community leaders, and funders in co-creating the business case.
- Be transparent by clearly explaining how funds will be used and their expected impact.
- Focus on scalability to show how the model can adapt to different communities and expand its reach.
- Use visuals like charts, infographics, and testimonials to make your case more compelling.

DEVELOPING A COMPREHENSIVE BUDGET



2

Creating a structured, transparent budget reflects the true costs of running CareShare while identifying areas where external funding is necessary. A well-crafted budget reassures funders, demonstrates preparedness, and highlights areas where adapting an existing program to align with the CareShare framework or implementing a new program can drive the most impact.

Why This Matters

- Demonstrates the program's financial feasibility.
- Builds funder confidence by showing a clear understanding of costs.
- Identifies funding gaps to guide targeted investment.
- Ensures operational sustainability and program scalability.

Key Actions

1. Identify Core Components of Budget

- Include costs for digital solutions (customization, licensing, maintenance), co-design workshops, volunteer training, vulnerable background checks and operational needs (coordination, marketing, outreach).
- Plan for community engagement, knowledge exchange, evaluation, and administrative essentials (utilities, insurance, HR, legal).

2. Estimate Costs

- Use environmental scans or market research to forecast costs accurately.
- Factor in smaller but essential expenses, such as refreshments, venue rentals, and volunteer recognition.
- Separate costs into one-time (start-up) and recurring (operational) expenses to clarify funding needs.

3. Identify Funding Gaps

- Highlight areas requiring external funding (e.g., volunteer stipends, app maintenance).

4. Add Contingencies

- Set aside 5-10% for unexpected expenses and scaling needs.



Expected Outputs

- A detailed and transparent budget that funders can trust.
- Identification of funding gaps and priority investment areas.
- Clear financial roadmap for sustainable operations.



Tips & Tricks

- Engage financial experts to consult on and validate cost estimates.
- Anticipate indirect costs to avoid overlooking secondary expenses such as volunteer recognition or materials.
- Highlight ROI to clearly articulate how the budget supports program outcomes and scalability.
- Use plain language and visual aids to simplify and communicate budget details to funders effectively.



DEVELOPING PARTNERSHIPS AND STAKEHOLDER MAPPING



2

Organizations taking the lead in implementing or adapting their programs to align with CareShare's framework, can benefit from strategic partnerships with community organizations, funders, in-kind contributors, and technology providers. These collaborations extend the program's reach, secure essential resources, and enhance its credibility among caregiving communities. By fostering strong partnerships, the Lead Partner Model ensures cultural alignment, builds local trust, and maintains operational efficiency, ultimately driving the sustainability and impact of CareShare.

Why This Matters

- Builds credibility by partnering with established organizations to boost CareShare's reputation and foster community trust.
- Expands community reach as local partners bring relevance (cultural, regional, neighbourhood-based) and accessibility, driving caregiver engagement and program adoption.
- Maximizes impact through stakeholder mapping to ensure the right partners are engaged at the right time to optimize program outcomes.

Key Actions

1. Conduct a Stakeholder Map

- Develop a comprehensive list of potential stakeholders and partners, including local agencies, businesses, sponsors for incentives and technology partners.
- Categorize stakeholders by their Influence and Interest:
 - i. High Influence / High Interest: Prioritize these stakeholders for early engagement.
 - ii. High Influence / Low Interest: Collaborate to build their interest and showcase program value.
 - iii. Low Influence / High Interest: Engage as advocates and local champions.
 - iv. Low Influence / Low Interest: Keep informed and revisit as the program grows.

2. Shortlist Stakeholders

- Identify who to work with based on alignment with program goals and readiness to engage.



3. Create Engagement Plans

- Design communication strategies for each stakeholder group.
- Schedule introductory meetings to align on goals and present the CareShare program's value.
- Address specific motivations for each stakeholder and emphasize the positive community impact.

Expected Outputs

- A prioritized stakeholder list categorized by their influence and interest levels, ready for targeted engagement.
- Tailored engagement plans with customized communication strategies for each stakeholder group.
- Completed introductory meetings with key stakeholders to establish shared goals, program overview, and expectations.
- Initial stakeholder commitments such as verbal or written agreements from high-priority stakeholders to participate, fund, donate to or advocate for the program.
- Collaborative input including early feedback and suggestions from engaged stakeholders to refine program design and build co-ownership.

Tools & Resources

- Hardy, M. (2020). It's Time to Do Stakeholder Mapping Differently. Tamarack Institute.
- Outreach Plan Checklist (See Appendix)



Tips & Tricks

- Prioritize with a visual matrix using an interest versus influence grid to identify and focus on high-priority stakeholders for early engagement.
- Tailor communication by customizing messages to align with stakeholder motivations and needs.
- Showcase quick wins by sharing early program successes to build credibility and demonstrate value.
- Recognize contributions by publicly acknowledging stakeholder efforts to reinforce their value and encourage long-term collaboration.

PREPARING A MEMORANDUM OF UNDERSTANDING



2

A Memorandum of Understanding (MOU) is a critical document that lays the foundation for successful partnerships. It formalizes the collaboration between partners, providing clarity, accountability, and mutual understanding. MOUs outline roles, expectations, and commitments, ensuring all parties are aligned toward shared goals.

Why This Matters

- Provides clarity by defining partner roles, expectations, and commitments.
- Aligns partners toward shared goals and a common vision.
- Offers legal and operational safeguards, addressing data sharing, confidentiality, and resource allocation.
- Promotes accountability by documenting agreed-upon contributions.
- Builds sustainability by establishing a foundation for long-term collaboration.

Key Actions

1. Identify and Engage Key Partners

- Determine organizations or individuals involved in the partnership.
- Engage partners early to ensure alignment on objectives.

2. Define the Purpose of the MOU

- Clearly articulate the partnership's reason and shared goals.
- Ensure mutual agreement on desired outcomes.

3. Outline Roles and Responsibilities

- Specify commitments and contributions of each partner (e.g., funding, staff time, resources).

4. Establish Terms of Collaboration

- Define governance structures, decision-making processes, and communication protocols.
- Address legal considerations, such as intellectual property rights and confidentiality.



5. Draft, Review, and Formalize the MOU

- Create a draft that reflects all agreed terms.
- Seek input from partners and legal review before finalizing.
- Obtain authorized signatures and ensure all parties retain copies.

Expected Outputs

- Finalized and signed MOU with each key partner.

Tools & Resources

- Components of a Memorandum of Understanding ([See Appendix](#))



Tips & Tricks

- Engage early to foster alignment and buy-in from partners.
- Use feedback loops to refine the document collaboratively.
- Focus on clarity to ensure roles, responsibilities, and expectations are unambiguous.
- Include mechanisms for dispute resolution to address conflicts effectively.





STEP 3: PREPARE FOR PROGRAM DELIVERY

This section outlines the essential steps for preparing the CareShare program for implementation. By focusing on planning, role definition, recruitment, training, and monitoring, this phase ensures that the program is ready to meet the needs of caregivers and seniors effectively. Thoughtful preparation at this stage is critical to delivering a well-organized and impactful program.

Why This Matters

- Ensures that all necessary structures and processes are in place, creating a seamless experience for participants and stakeholders.
- Establishes a clear plan for implementation, reducing uncertainty and fostering confidence among volunteers, caregivers, and community partners.
- Supports quality delivery, enabling consistent and measurable outcomes while addressing potential challenges early on.

Key Actions

- Planning Program Flow
- Co-Designing Roles and Responsibilities
- Recruiting Seniors and Caregivers
- Screening and Selecting Volunteers
- Onboarding and Training Volunteers
- Assessing and Managing Risk
- Monitoring Program Delivery



Expected Outcomes

- A detailed program flow that ensures smooth and efficient delivery.
- Clearly defined roles and responsibilities for all stakeholders.
- Successful recruitment of seniors, caregivers, and volunteers, meeting program participation targets.
- Volunteers who are confident, well-trained, and ready to support program objectives.
- A monitoring framework that tracks program performance and enables continuous improvement.

Tools & Resources

- Miro or Lucidchart for creating digital flowcharts.
- Process Map Sample CareShare Co-op Pilot (See Appendix)
- Training Strategies and Checklist (See Appendix)
- Sample CareShare Co-op Outreach Flyers (See Appendix)
- Volunteer Canada. (2024). 10 Steps of Screening: A Brochure for Volunteer Management.
- Public Safety Canada. Screening Handbook: Tools and Resources for the Voluntary Sector.



PLANNING PROGRAM FLOW

Charting the course for your CareShare program involves mapping out each step in the process and writing a detailed plan to guide implementation. This ensures a streamlined experience for caregivers, volunteers, and facilitators while providing a clear framework for operations. A well-planned program flow incorporates key elements such as team roles, timelines, deliverables, and resources.

Why This Matters

- Provides clarity by defining every step and ensuring roles and responsibilities are understood.
- Ensures efficiency by streamlining operations and avoiding redundancies.
- Supports scalability by creating a replicable model for future communities.
- Enhances user experience by offering a seamless and supportive process for participants.

Key Actions

1. Define Core Processes

- Identify the key stages in the CareShare model, such as request submission, coordination, matching, and support delivery.

2. Develop a Process Flow Diagram

- Use platforms like Lucidchart or Miro to create a detailed visual representation of tasks and decision points.

3. Map Dependencies and Responsibilities

- Assign specific roles to facilitators, caregivers, and helpers for each process step.
- Highlight decision points and actions required at each stage.

4. Simulate the Process

- Run hypothetical scenarios to identify gaps or inefficiencies.
- Iterate and refine the flowchart based on feedback.

Expected Outputs

- A detailed and visually appealing process flowchart for the CareShare program.

- Identify all the roles needed for each process step
- A well-documented and tested process ready for program launch.

Tools & Resources

- Miro or Lucidchart for creating digital flowcharts.
- Process Map Sample CareShare Co-op Pilot (See Appendix)



Tips & Tricks

- Start with a high-level overview before detailing individual steps.
- Involve stakeholders such as caregivers, volunteers, and facilitators in co-designing the flowchart to ensure inclusivity and practicality.
- Use consistent visuals and labels to make flowcharts intuitive and accessible.
- Test and iterate frequently to ensure the program flow aligns with real-world scenarios.
- Ensure accessibility by making flowcharts easy to understand for diverse audiences, including non-technical users.



CO-DESIGNING ROLES AND RESPONSIBILITIES



3

Engaging the community is essential to co-design volunteer roles and develop training programs. Community workshops serve as collaborative spaces to align program goals with community needs and leverage local expertise for program success.

Why This Matters

- Encourages collaboration by ensuring roles and responsibilities are co-created with input from stakeholders.
- Enhances clarity by defining essential roles and responsibilities to avoid confusion.
- Empowers communities by promoting shared ownership and accountability.
- Tailors training to meet specific cultural and operational needs.

Key Actions

1. Define Core Roles & Responsibilities

- Identify essential roles required for program success (e.g., Program Manager, Volunteer Coordinator, CareShare Ambassador).
- Develop detailed role descriptions, outlining expectations, qualifications, and key responsibilities.
- Clarify boundaries of roles to ensure compliance with legal, ethical, and safety standards.

2. Engage Key Stakeholders & Co-Design Services

- Involve community leaders, caregivers, program partners, and legal advisors to ensure roles meet community needs.
- Conduct co-design sessions to establish a clear list of services volunteers will provide, ensuring cultural sensitivity and feasibility.
- Perform a liability assessment to confirm that volunteer-provided services are low-risk, insurable, and align with program capabilities.

3. Validate and Formalize Roles

- Finalize and document role descriptions and assign responsibilities to maintain clarity and accountability.
- Develop a structured onboarding process for each role, ensuring new volunteers and staff understand their duties.



- Ensure alignment with risk management protocols, including background checks and legal sign-offs.

4. Develop & Implement Training Plans

- Create comprehensive training modules tailored to each role's specific responsibilities, including:
 - i. CareShare program overview & values.
 - ii. Role expectations and limitations.
 - iii. Cultural competency and communication strategies.
 - iv. Confidentiality, incident reporting, and safety protocols.
 - v. Digital platform training (e.g., using the Tuktu app for scheduling and reporting).
- Offer training in multiple formats (in-person, virtual, asynchronous) to increase accessibility.
- Provide ongoing support through mentorship, peer learning, and refresher sessions.

5. Pilot Roles & Gather Feedback

- Implement a structured pilot phase where volunteers and staff operate in their roles under real conditions.
- Collect feedback through surveys, focus groups, and observation to assess:
 - i. Role clarity and confidence levels.
 - ii. Effectiveness of training.
 - iii. Challenges and gaps in role execution.
- Adjust roles, training, and service offerings based on insights gained.

6. Refine & Scale Based on Lessons Learned

- Integrate feedback to improve training, onboarding, and service delivery.
- Expand recruitment efforts based on insights from pilot participants.
- Document and share learnings through knowledge exchange sessions and inclusion in the CareShare Playbook to guide future implementations.

Expected Outcomes

- Clearly define volunteer and program roles.
- Tailored training modules aligned with program goals.
- Increased community engagement and ownership.
- Feedback-informed role adjustments to improve program effectiveness.

Tools & Resources

- Feedback collection forms: [Google Forms](#) or [SurveyMonkey](#)
- List of Potential Volunteer Services ([See Appendix](#))
- Training Strategies and Checklist ([See Appendix](#))



Tips & Tricks

- Engage early by including stakeholders in the early stages of role definition to ensure alignment.
- Use clear communication to outline expectations and responsibilities for all roles.
- Iterate based on feedback by using pilot testing and feedback loops to refine roles and training plans.
- Empower the community by assigning leadership roles to local representatives to promote ownership.
- Leverage support roles by incorporating specialized expertise—such as Legal Counsel or Data Analysts—as needed for program success.



RECRUITING SENIORS AND CAREGIVERS



3

Effective recruitment is essential for the success of the CareShare Co-op. A strong recruitment plan involves crafting outreach materials that resonate with the community and leveraging existing networks to build trust and engagement. By tapping into cultural values and community infrastructure, recruitment efforts can yield committed and long-term volunteers, seniors, and caregivers.

Why This Matters

- Builds engagement by fostering trust and connections within the community.
- Promotes diversity by recruiting participants from different cultural backgrounds.
- Ensures sustainability by attracting participants for long-term program involvement.
- Increases accessibility through meaningful and relatable messaging.

Key Actions

1. Create Compelling Outreach Materials

- Develop culturally aligned materials tailored to the needs and values of the target community.
- Incorporate multilingual resources to ensure accessibility.

2. Leverage Existing Networks

- Partner with trusted local organizations, community centers, and faith-based groups to amplify outreach.
- Collaborate with community champions to share program benefits through their networks.

3. Host Community Engagement Events

- Organize interactive information sessions and workshops to educate and inspire potential participants.
- Showcase success stories from current volunteers and caregivers to build trust and highlight impact.

4. Provide Clear Incentives

- Outline tangible benefits for participants, such as respite, training opportunities, or community recognition.

Expected Outputs

- Increased awareness of the CareShare program.
- Higher recruitment rates for seniors, caregivers, and volunteers.
- Stronger community relationships built on trust and collaboration.
- Well-distributed outreach materials that resonate with the community.

Tools & Resources

- Sample CareShare Co-op Outreach Flyer(s) ([See Appendix](#))



Tips & Tricks

- Be culturally sensitive by tailoring messages to reflect community values and languages.
- Use diverse channels by combining digital and in-person outreach for maximum reach.
- Highlight benefits to emphasize the positive impact on participants and the community.
- Encourage word-of-mouth by leveraging satisfied participants to advocate for the program.
- Track engagement to monitor which strategies yield the best results and adapt accordingly.



SCREENING AND SELECTING VOLUNTEERS



3

Volunteer screening and selection ensure that participants are well-prepared, trusted, and aligned with the needs of caregivers and care recipients.

Why This Matters

- Builds trust by engaging vetted and reliable volunteers.
- Ensures safety through adherence to protocols for working with caregivers and care recipients.
- Promotes alignment by matching volunteers with program values and community needs.
- Enhances preparedness by equipping volunteers with the skills and knowledge needed to succeed.

Key Actions

1. Engage Trusted Community Networks

- Partner with local organizations to identify and recruit volunteers.

2. Establish Clear Screening Protocols

- Include background checks and references to reduce risk and ensure safety.

3. Provide Structured Onboarding

- Deliver training modules to prepare volunteers for their roles and responsibilities.

4. Incorporate Risk Management

- Use regular reviews and mechanisms to address potential risks or gaps in performance.

5. Develop Feedback Channels

- Create ongoing opportunities for volunteers to provide and receive feedback.

Expected Outputs

- A pool of well-screened, prepared, and reliable volunteers.
- Streamlined onboarding processes that align with program needs.
- Improved safety and trust within the program.



- Continuous improvement through volunteer feedback.

Tools & Resources

- Volunteer Canada. (2024). 10 Steps of Screening: A Brochure for Volunteer Management.
- Public Safety Canada. Screening Handbook: Tools and Resources for the Voluntary Sector.



Tips & Tricks

- Leverage existing networks by using community connections to streamline the recruitment process.
- Standardize screening to ensure consistency in protocols for all volunteers.
- Simplify onboarding by providing clear and concise training to reduce confusion.
- Encourage feedback by using volunteer input to improve processes and training.
- Prioritize safety by adhering to standards for working with vulnerable populations.



ONBOARDING AND TRAINING VOLUNTEERS



3

A well-structured onboarding process provides volunteers with the knowledge, tools, and support they need to effectively assist caregivers and seniors. Through a mix of in-person orientation, hands-on platform training, and interactive online sessions, volunteers gain practical skills and a strong understanding of their roles. This comprehensive approach builds confidence, fosters alignment with program objectives, and promotes adherence to safety and quality standards.

Why This Matters

- Ensures preparation by equipping volunteers to perform their roles effectively.
- Builds confidence through structured and engaging training methods.
- Aligns volunteers with program goals and safety standards.
- Strengthens engagement by fostering commitment and enthusiasm for the program.

Key Actions

1. Recruitment and Screening

- Conduct targeted community outreach through local centers, schools, and faith-based organizations to attract volunteers. Use promotional materials like posters, flyers, and social media ads.
- Implement a structured application process to collect key details (e.g., availability, caregiving skills, language preferences).
- Perform vulnerable sector checks and reference calls to ensure the safety and reliability of all volunteers.

2. Platform Training and Familiarization

- Organize introductory sessions to walk volunteers through the platform's core functions (e.g., profile setup, scheduling, and reporting).
- Provide self-paced resources such as video tutorials, quick-start guides, and FAQs to allow volunteers to learn at their own pace.
- Offer ongoing troubleshooting support through designated tech leads or help desks.



3. Orientation Sessions

- Host in-depth orientation sessions to explain the mission, values, and goals of the CareShare program.
- Include practical training on using the digital platform with real-time demonstrations and interactive Q&A sessions.
- Share program protocols, including what is and isn't allowed, to set clear expectations for volunteers.

4. Role-Specific Training Steps

- Deliver customized training sessions that focus on specific volunteer activities (e.g., companionship, household support).
- Provide practical scenarios and role-play exercises to help volunteers handle common challenges, including emergencies.
- Emphasize confidentiality protocols and the importance of respecting boundaries in caregiving roles.

5. Shadowing Opportunities Steps

- Arrange mentor-pairing opportunities where new volunteers accompany experienced ones for hands-on learning during their first few visits.
- Use a feedback mechanism where both the new and experienced volunteers provide reflections and insights to enhance future training.

6. Approval and Deployment Steps

- Conduct a final readiness evaluation to confirm that volunteers are confident, capable, and clear about their roles.

Expected Outputs

- Fully trained and confident volunteers ready to support program goals.
- Improved safety and preparedness through comprehensive onboarding.
- Increased volunteer satisfaction and engagement.
- Aligned program practices with safety and cultural standards.

Tools & Resources

- Training Strategies and Checklist ([See Appendix](#))



Tips & Tricks

- Offer flexibility by combining live and asynchronous training to accommodate diverse schedules.
- Simplify materials to ensure training content is easy to understand and apply.
- Encourage shadowing to build confidence and skills through mentorship.
- Promote engagement by incorporating interactive Q&A sessions to address volunteer concerns.
- Track progress to monitor training completion and ensure readiness for deployment.



ASSESSING AND MANAGING RISK



3

To ensure the CareShare app operates within legal boundaries and mitigates liability risks, all services offered must be assessed through a liability lens. This ensures compliance with legal requirements and protects all stakeholders, including volunteers, service recipients, and partnering organizations.

Why This Matters

- Ensuring compliance with liability regulations helps prevent legal disputes and financial penalties.
- Establishing clear guidelines fosters trust among users, volunteers, and partner organizations.
- A well-structured liability framework supports the long-term growth and scalability of CareShare services.
- Proactive risk management minimizes the likelihood of accidents, complaints, and reputational damage.

Key Actions

1. Ensure Insurance Coverage

- Verify that all services provided through the platform have appropriate insurance coverage.
- Identify liability gaps and ensure stakeholders, including volunteers and service providers, have adequate protection.
- Work with legal teams to determine whether general liability, professional liability, or other specific policies are required.

2. Assess Service Feasibility

- Assess whether high-risk services, such as transportation (e.g., giving rides to individuals) and medical accompaniment, are viable within liability constraints.
- Consider alternative solutions such as partnerships with insured transportation providers or providing virtual support where applicable.

3. Implement Risk Mitigation Strategies

- Implement risk assessment protocols for services involving direct person-to-person interaction.



- Establish clear terms of service, consent forms, and disclaimers for users and volunteers.
- Provide training and guidelines for service providers to minimize liability exposure.

4. Ensure Compliance with Regulations

- Ensure adherence to local, provincial, and national laws governing volunteer services and caregiving support.
- Engage with legal advisors to maintain compliance with evolving liability and regulatory frameworks.

5. Establish Incident Management and Reporting Protocols

- Develop a structured process for reporting, documenting, and addressing liability-related incidents.
- Establish clear escalation protocols to handle liability claims effectively.
- Communicate expectations and liability limitations transparently with users and volunteers.

Expected Outputs

- A documented liability policy integrated into CareShare's operational framework.
- Clear terms of service, consent forms, and disclaimers for all users.
- Volunteer liability training covering risk identification, response strategies, and reporting procedures.
- A structured incident management process for liability-related concerns.
- A legal compliance checklist to ensure all services align with regulations.



Tips & Tricks

- Proactively consult legal professionals to identify liability risks before launching new services.
- Ensure terms and disclaimers are easily understood by users and volunteers.
- Regularly review liability policies to align with evolving regulations and risk factors.
- Provide ongoing training and awareness sessions on liability mitigation strategies.
- Collaborate with insurance providers to offer coverage options for volunteers and service users.

MONITORING PROGRAM DELIVERY



3

This section provides guidance on how to effectively monitor the delivery of the CareShare program. By establishing clear processes and feedback mechanisms, organizations can ensure the program's sustainability and long-term impact.

Why This Matters

- Ensures activities align with program goals and objectives, allowing for timely course corrections, reinforcing the logic model developed in Step 1.
- Provides valuable data to measure success and identify areas for improvement.
- Fosters accountability among all stakeholders, ensuring program standards are maintained.

Key Actions

1. Engage Stakeholders in Feedback

- Implement mechanisms for regular input from caregivers, volunteers, and community leaders.
- Use focus groups, interviews, and feedback sessions to gather qualitative insights.

2. Implement Real-Time Tracking

- Use digital platforms, such as the Tuktu app, to monitor activities like volunteer hours, completed visits, and service outcomes in real time.

3. Conduct Regular Check-Ins

- Schedule periodic meetings with program staff, volunteers, and stakeholders to review progress and address challenges.

4. Document Lessons Learned

- Create a repository of insights and recommendations from ongoing monitoring to inform future program iterations.

Expected Outputs

- A set of key performance indicators (KPIs) that align with program goals and guide performance evaluation.
- Monitoring tools that provide actionable data and are accessible to stakeholders.

- A feedback loop that integrates stakeholder perspectives into program adjustments.
- Reports detailing real-time progress and outcomes, generated through Tuktu.
- A schedule of regular review meetings with program staff and stakeholders.
- A lessons-learned database that supports continuous improvement and scalability.



Tips & Tricks

- Ensure all stakeholders understand the purpose of monitoring and how the data will be used.
- Regularly collect and review data to maintain program alignment with objectives.
- Automate data collection and reporting wherever possible to reduce administrative burden.
- Use insights from stakeholders to make real-time adjustments to program delivery.





STEP 4: EVALUATE AND SUSTAIN

The Evaluate and Sustain phase focuses on assessing the effectiveness of the CareShare Co-op initial roll-out, capturing valuable insights from stakeholders, and creating a roadmap for sustainability or replicate the program in new communities. This phase ensures continuous improvement, demonstrates impact, and builds a strong foundation for sustainable growth.

Why This Matters

- Validates the program's success and identifies areas for improvement.
- Provides evidence to secure long-term funding and stakeholder trust.
- Sustain the model in your community to ensure continuous impact.

Key Actions

- Measuring Success
- Collecting Feedback
- Analyzing the Data
- Facilitating Feedback Sessions
- Sharing Key Learning
- Building Long-Term Sustainability





Expected Outcomes

- A comprehensive evaluation report highlighting key achievements, challenges, and learnings.
- Clear, data-driven insights to refine program design and implementation.
- Enhanced stakeholder trust and support through transparent reporting.
- A scalable and adaptable program model ready for replication in diverse community settings.
- Strengthened partnerships and increased engagement from local stakeholders in new regions.
- Sustainable funding strategies aligned with long-term program goals.

Tools & Resources

- Sample Logic Model – CareShare Pilot (See Appendix)
- CareShare Co-op Pilot Evaluation Guide (See Appendix)
- McMaster University. *Using Focus Groups in Program Development and Evaluation*. SPARK.
- Survey tools: Google Forms, SurveyMonkey, or Typeform.
- Data analysis software: Excel, Power BI, or Google Sheets
- Visualization tools: Canva or Excel



MEASURING SUCCESS

Defining Key Performance Indicators (KPIs) and tracking program impact ensures that the CareShare Co-op delivers measurable outcomes, adapts to changing needs, and remains effective over time. This phase builds on the foundation of the previous steps, focusing on long-term sustainability and scalability.

Why This Matters

- Validates the model by demonstrating program effectiveness through evidence-based findings.
- Drives improvement by identifying areas for refinement and adaptation.
- Secures support by building trust with stakeholders and funders through measurable results.
- Guides scalability by providing insights to replicate the program in new communities.

Key Actions

1. Refer to your Logic Model for Evaluation

- Ensure KPIs align directly with short-term, intermediate, and long-term program objectives (e.g., caregiver stress reduction, respite utilization).
- Identify target metrics for volunteer retention, caregiver feedback, and service outcomes.

2. Design Comprehensive Data Collection Plan

- Qualitative Methods: Conduct interviews and focus groups with caregivers and volunteers to gather in-depth feedback.
- Quantitative Methods: Leverage platform data (e.g., Tuktū metrics) to track service frequency, volunteer activity, and hours logged.
- Integrate pre- and post-program surveys targeting caregiver stress, satisfaction, and quality of life.

3. Develop Evaluation Tools

- Create standardized survey templates for volunteers and caregivers, incorporating scales for measuring stress, satisfaction, and support.
- Use observational checklists during pilot activities to assess real-time program delivery quality.



4. Conduct Analysis and Validation

- Use comparative analysis for pre- and post-program data to measure impact against baseline conditions.
- Cross-reference qualitative insights with quantitative metrics to identify patterns and validate program theory of change.

5. Generate Data Visualizations and Reports

- Prepare charts, graphs, and infographics to highlight program results.
- Include success stories and qualitative quotes to contextualize findings and emphasize human impact.

6. Disseminate Results Strategically

- Deliver tailored presentations for stakeholders (e.g., funders, partners) with clear insights on ROI and community impact.

Expected Outputs

- Validated KPIs highlighting program strengths and opportunities for growth.
- Evidence-based insights into outcomes like stress reduction, volunteer engagement, and program sustainability.
- Reports that support funding applications and stakeholder engagement.
- Data-driven recommendations for scaling the program to new regions.

Tools & Resources

- Sample Logic Model – CareShare Pilot ([See Appendix](#))
- CareShare Co-op Pilot Evaluation Guide ([See Appendix](#))



Tips & Tricks

- Use visuals to make findings easier to digest through graphs and infographics.
- Focus on impact by highlighting stories and data that demonstrate real-world change.
- Keep it simple by avoiding jargon and making reports accessible to all audiences.
- Close the loop by sharing how feedback has been used to improve the program.

Collecting feedback ensures the CareShare Co-op is continuously improving and meeting the needs of caregivers, care recipients, and volunteers. By combining surveys, interviews, focus groups, and digital platform data, feedback provides a well-rounded understanding of program impact and identifies areas for refinement.

Why This Matters

- Ensures the program remains effective and aligned with participant needs.
- Builds trust and transparency by valuing participant input.
- Provides actionable insights for ongoing program improvement and scaling efforts.

Key Actions

1. Develop and Distribute Tailored Surveys

- Caregiver Feedback: Measure satisfaction, stress levels, and perceived impact of respite services.
- Volunteer Insights: Assess role clarity, confidence, and support needs.
- Care Recipient Feedback: Gauge quality of interactions and overall program experience.
- Use a mix of scaled, open-ended, and demographic questions to capture a wide range of data.

2. Host Interviews and Focus Groups

- Facilitate in-depth discussions with caregivers and volunteers to uncover nuanced perspectives.
- Use semi-structured interview guides aligned with program goals, covering topics like service satisfaction and areas for improvement.
- Conduct focus groups with diverse participants to identify community-wide themes and shared experiences.

3. Leverage Digital Platform Metrics

- Analyze service trends, such as response times, activity completion rates, and volunteer hours logged through tools like Tuktu dashboards.





- Track digital engagement, including login frequency and app usage patterns, to identify barriers or gaps.

4. **Organize Debrief Sessions with Stakeholders**

- Facilitate reflective sessions with team leads, community partners, and funders to discuss feedback findings.
- Synthesize lessons learned into actionable recommendations, focusing on immediate adjustments and long-term goals.
- Highlight success stories and unresolved challenges to guide ongoing efforts.

5. **Close the Feedback Loop**

- Share aggregated findings with participants, showcasing how their input has informed changes.
- Maintain ongoing communication through newsletters, webinars, or platform updates to sustain transparency.

Expected Outputs

- Comprehensive insights into participant experiences.
- Identification of program strengths and challenges.
- Data-driven recommendations for refinement and growth.
- Enhanced engagement and transparency with participants.

Tools & Resources

- McMaster University. [Using Focus Groups in Program Development and Evaluation](#). SPARK.
- Survey tools: [Google Forms](#), [SurveyMonkey](#), or [Typeform](#).

Analyzing data helps us understand what worked, what didn't, and why. By combining quantitative (numbers) and qualitative (stories) data, we can make informed decisions to refine the CareShare Co-op and prepare for future growth.

Why This Matters

- Identifies program strengths and areas for improvement.
- Combines measurable metrics with participant experiences for a full picture.
- Informs program refinements and scaling strategies.

Key Actions

1. Measure What Happened (Quantitative Data)

- Use descriptive statistics like averages, totals, and percentages to summarize data (e.g., volunteer hours, satisfaction scores).
- Compare pre- and post-pilot results to measure changes (e.g., stress reduction levels, platform usage growth).
- Visualize data using bar charts, line graphs, or pie charts.

2. Understand Why It Happened (Qualitative Data)

- Transcribe interview and focus group recordings into text.
- Identify recurring themes and patterns through thematic analysis.
- Highlight key quotes to bring participant experiences to life.

3. Combine Data Types

- Use quantitative data to show what happened.
- Use qualitative data to explain why it happened.

4. Identify Areas for Improvement

- Highlight what worked well (e.g., high satisfaction, increased caregiver trust).
- Address what needs improvement (e.g., gaps in training, scheduling issues).
- Explore opportunities for growth (e.g., enhanced platform usability, caregiver support tools).



Expected Outputs

- Clear data insights showing program impact and opportunities.
- Actionable recommendations for refinement and scaling.
- Reports highlighting both successes and areas for improvement (e.g. Report, Presentation, Success Story).

Tools & Resources

- Data analysis software: Excel, Power BI, or Google Sheets
- Visualization tools: Canva or Excel



Tips & Tricks

- Keep it visual by using charts to make findings easier to understand.
- Focus on stories by including quotes that illustrate key data points.
- Be transparent by sharing both successes and challenges for balanced reporting.
- Prioritize actionable insights by highlighting what can be changed or improved immediately.



FACILITATING FEEDBACK SESSIONS

Engage caregivers and volunteers in open feedback forums. Debrief sessions provide a safe space for caregivers and volunteers to share their experiences, challenges, and ideas. These open discussions help uncover valuable insights, build trust, and guide improvements for the CareShare Program.

Why This Matters

- Creates a platform for open communication and collaboration.
- Builds trust and transparency with participants.
- Provides actionable feedback to refine and scale the program.

Key Actions

1. Prepare for the Session

- Set objectives to define the session's purpose (e.g., gather feedback, celebrate wins).
- Choose the format, deciding between in-person, virtual, or hybrid formats.
- Invite participants by sending invitations in advance to caregivers, care recipients, and volunteers.
- Create comfort to ensure participants feel safe to share openly.

2. Structure Session

- Open by welcoming participants, explaining the purpose, and assuring confidentiality.
- Facilitate discussions using guided questions to focus on key topics.
- Close by summarizing the discussion, thanking participants, and explaining next steps.

3. Follow-up After the Session

- Summarize insights and key takeaways.
- Share feedback outcomes to communicate how input will guide improvements.
- Address any immediate concerns raised during the session.





4

Expected Outputs

- Key themes and actionable feedback summarized.
- Improved understanding of participant experiences and program impact.
- Increased trust and participant engagement.

Tools & Resources

- [CareShare Co-op Pilot Evaluation Guide](#)
- McMaster University. [Using Focus Groups in Program Development and Evaluation](#). SPARK.



Tips & Tricks

- Reflect on participant comments to show understanding through active listening.
- Ensure everyone has a chance to contribute by encouraging participation.
- Use a timekeeper to keep discussions focused and efficient.
- Capture feedback accurately for post-session analysis by taking detailed notes.





SHARING KEY FINDINGS

Clear and thoughtful reporting is essential for demonstrating the impact of the CareShare Co-op. Sharing key findings builds trust, highlights successes, and identifies opportunities for growth. Effective communication ensures stakeholder engagement and supports future funding and scaling efforts.

Why This Matters

- Builds transparency by keeping stakeholders informed and aligned.
- Strengthens relationships by celebrating shared achievements with partners.
- Drives action by providing insights that guide decision-making and program improvements.

Key Actions

1. Share Insights:

- Summarize key findings in evaluation reports with visuals and actionable recommendations.
- Use presentations to communicate findings in an accessible format for stakeholders.
- Highlight participant experiences in success stories to personalize the data.

2. Tailor Messages for Different Audiences:

- Funders: Emphasize impact, milestones, and return on investment.
- Community Partners: Focus on collaboration opportunities and shared successes.
- Internal Teams: Highlight lessons learned and actionable improvements.

3. Follow-Up After Sharing Results:

- Host Q&A Sessions to address stakeholder questions.
- Share Infographics or Summaries with participants for accessibility.
- Track how findings are being applied to refine program decisions.

Expected Outputs

- Comprehensive reports tailored to stakeholder needs.
- Increased engagement and support from funders, partners, and participants.
- Actionable feedback for program improvements and scaling strategies.



Tips & Tricks

- Use visuals to simplify complex data and make reports more engaging.
- Highlight stories that bring data to life and connect with stakeholders emotionally.
- Customize reports to align with the specific needs and interests of your audience.
- Follow up on shared insights to demonstrate responsiveness and build credibility.



Securing funding and creating self-sustaining ecosystems ensures the CareShare Co-op continues to deliver value, adapt to community needs, and grow without constant reliance on short-term funding. Sustainability isn't a one-time goal—it's an ongoing process. By diversifying funding, empowering communities, and creating efficient systems, the CareShare Co-op can deliver lasting impact.

Why This Matters

- Ensures stability by reducing dependency on temporary funding sources.
- Fosters local leadership by building community ownership and engagement.
- Drives growth by creating scalable processes that can expand to new regions.

Key Actions

1. Diversify Funding Sources

- *Grants:* Apply for local, regional, and national funding opportunities.
- *Corporate Sponsorships:* Build partnerships with businesses invested in social impact.
- *Community Fundraising:* Host local campaigns or crowdfunding initiatives.
- *Government Support:* Explore municipal or regional funding programs.

2. Foster Community Ownership

- Encourage local organizations to take leadership roles.
- Involve community champions and ambassadors.
- Build volunteer-led steering committees for ongoing support.

3. Create Sustainable Processes

- Automate administrative tasks using digital tools for volunteer management and reporting.
- Standardize training by developing reusable training modules and onboarding templates.
- Track metrics regularly to monitor KPIs and demonstrate long-term impact.

4. Facilitate Knowledge Transfer

- Document lessons learned and share best practices.





- Use case studies to showcase program success.
- Offer training sessions for new community leaders.

Expected Outputs

- Stable funding streams from diverse sources.
- Empowered local leaders and community-driven initiatives.
- Efficient, scalable processes for program expansion.

Tools & Resources

- See [Building a Case for Support](#)
- See [Onboarding and Training Volunteers](#)



Tips & Tricks

- Engage early by involving local leaders during the pilot phase to build ownership.
- Mix short-term project funding with long-term operational funding strategies.
- Focus on impact by showcasing program results to attract long-term supporters.
- Stay adaptable by adjusting processes to meet evolving community needs.
- Celebrate success by sharing achievements with funders and stakeholders to build ongoing support.



Glossary

CareShare Ambassadors: Trained volunteers who provide respite services, companionship, and support to seniors and their caregivers.

CareShare Co-op: A volunteer-driven program that provides respite services to unpaid caregivers through a shared-economy model, leveraging digital tools and community engagement to facilitate mutual support and practical assistance.

CareShare Model: The framework designed to provide caregiver support through shared-economy principles, leveraging mutual support, volunteerism, and community collaboration.

Closed-Loop System: A secure system ensuring that program access and data are restricted to authorized community members, maintaining privacy, safety, and exclusivity.

Co-Design: A collaborative process involving caregivers, volunteers, and community members in designing and refining program components to ensure cultural relevance and usability.

Community Asset Map: A visual or documented inventory of existing community resources, organizations, and capabilities relevant to caregiving.

Cultural Adaptation: Adjusting program elements to reflect and respect the values, norms, and needs of a specific community.

Data-Driven Decision-Making: The process of using insights from collected data to guide program adjustments, improvements, and scalability efforts.

Debrief Sessions: Structured meetings held after key program milestones to reflect on lessons learned, successes, and challenges, and to identify opportunities for improvement.

Digital Platform Metrics: Data points collected through the Tuktu app to measure volunteer activity, caregiver engagement, types of services provided, and overall program performance.

Evaluation Framework: A structured approach to assess the impact and effectiveness of the CareShare Co-op, focusing on caregiver satisfaction, volunteer retention, and community engagement.

Feedback Loop: A continuous cycle of collecting, analyzing, and acting on feedback from stakeholders to improve program performance and user satisfaction.

Human-Centered Design: An approach prioritizing the needs, experiences, and feedback of end-users throughout program development and implementation.

Key Performance Indicators (KPI): Measurable values that indicate whether program objectives are being achieved.

Logic Model: A visual representation linking program inputs, activities, outputs, and outcomes, used for planning, implementation, and evaluation.

Metrics Framework: A structured approach to identifying and organizing key performance indicators (KPIs) for monitoring program effectiveness.



Milestone-Based Rewards: A system of recognizing and celebrating volunteer achievements when specific goals or milestones are reached. Rewards can include certificates, gift cards, or public acknowledgment.

Monitoring and Evaluation (M&E): A system to track program activities, measure progress, and assess outcomes to inform decision-making and improvement.

Needs Assessment: A systematic process of identifying and analyzing community caregiving challenges, resource gaps, and opportunities to guide program design.

Pilot Phase: The initial implementation period during which the CareShare Co-op is tested in a controlled environment, allowing for real-time feedback, adjustment, and refinement before broader rollout.

Post-service Surveys: Questionnaires distributed after a service is provided to collect feedback from caregivers, care recipients, and volunteers about their experiences and satisfaction levels.

Pre-service Surveys: Questionnaires distributed before a service is provided to collect baseline feedback from caregivers, care recipients, and volunteers about their experiences and satisfaction levels.

Quantitative Data: Measurable information collected through surveys, platform analytics, and usage statistics to track program outcomes and performance metrics.

Quantitative Data: Measurable information collected through surveys, platform analytics, and usage statistics to track program outcomes and performance metrics.

Recognition Model: A system of incentives and rewards (e.g., gift cards, certificates) designed to acknowledge and retain volunteers by celebrating milestones and contributions.

Respite Care: Temporary relief for caregivers by providing care or companionship to their loved ones, allowing caregivers to rest and attend to personal needs.

Scaling: The process of adapting and replicating a successful program in new communities or regions while maintaining its core goals, values, and effectiveness.

SMART Objectives: Goals that are Specific, Measurable, Achievable, Relevant, and Time-bound, ensuring clear direction and accountability.

Social Return on Investment (SROI): A calculation or evaluation that quantifies the social, economic, and environmental benefits of a program relative to its costs.

Stakeholder Engagement: The process of involving community members, caregivers, and other key groups in planning and decision-making to ensure inclusivity and buy-in.

Sustainability Plan: A strategy to ensure long-term program viability through diversified funding, community ownership, and automated processes.

Tuktu App: A digital platform used to match volunteers with caregivers, track service hours, manage scheduling, and facilitate communication.

Lived Experience Discovery: CareShare Co-op Interview Guide

Context

The early prototype of CareShare Co-op aims to meet the needs of unpaid caregivers in need of respite in caring for the older adults who may or may not be family members in their lives. The goal of having the CareShare service would be several folds: to support caregivers, build community, enable people to age at home, and amplify rewards/recognition opportunities for both companions and caregivers.

As part of a human-centered design approach, it is essential for our product / service to be grounded in the lived experience of our end-users: unpaid caregivers caring for older adults.

One approach is to gather lived experience journeys and stories from caregivers directly.

Purpose

Interview people with lived experience as caregivers to validate understanding of the problem, further identify gaps in informal supports, gather stories for co-design sessions, identify integrations and refine collaborator list.

Outcomes

- Conduct 3-5 interviews with caregivers with lived experience.
- Clear articulation of the problem that CareShare addresses.
- Identify 3-5 new or existing gaps in informal caregiver supports.
- Gather min. 3 stories of lived experiences for co-design sessions.
- Identify 1-3 possible integration points of CareShare with existing supports.
- Refine collaborator list by generating 3-5 new collaborators.

Interview Overview

- 45-60 min. per caregiver
- Open-ended questions
- Virtual or in-person

Interview Questions

Gathering Experience

1. Tell me about your journey caring for the older adult in your life? A caregiver in our case is someone who provides ongoing care and assistance, without pay, for older family members and friends.
 - a. What are / were the challenges?
 - b. What are / were the areas about it that bring your joy?

2. What is or has been your biggest challenge(s) as a caregiver? What were the contributing factors to this? What did you find helpful?
3. Can you describe the informal support systems (friends, family, neighbours) you currently rely on? Where do you see gaps or areas lacking support?
 - a. Was there any support you need / needed that you couldn't find?
 - b. Are / were there times of day, times during the week when it was harder to find help?
4. What does the perfect support system for caregivers to get help or take a break look like to you? (No limits thinking!)

Sources of Information and Knowledge

5. What existing supports, groups, people, or programs do you find most useful? How and when do you use them?
6. Are there supports, resources, information you wish you had access to, but couldn't find or access?

CareShare Reflections

7. Based on your experience, to what extent does the CareShare Co-op align with the problems you've faced?
8. In what ways could CareShare be added to and improve the existing supports you are currently using?
9. From your perspective, which organizations, communities, or individuals would be important to involve in the development of CareShare?
10. Is there anything else you'd like to share that we haven't covered?
11. Would you like to stay involved in the CareShare Co-op project? We may contact you to continue our conversation today or share events and opportunities that you could be involved in.



APPENDIX A-2:

What to Look for in a Digital Platform

When selecting a digital platform to support caregiving initiatives, it is essential to prioritize features that enhance user experience, streamline coordination, and ensure data security. A well-designed platform not only supports operational efficiency but also builds trust among users by ensuring privacy and compliance with legal standards.

Key Features

1. User Management

- a. Profiles for volunteers, caregivers, and coordinators.
- b. Role-based access to maintain data security and limit unnecessary exposure.

2. Service Coordination

- a. Matching algorithms to align caregivers and volunteers based on geography and availability.
- b. Tools to manage volunteer schedules and optimize service delivery.

3. Metrics and Reporting

- a. Dashboards for real-time tracking of program activities and outcomes.
- b. Reports on service hours, visit types, and user feedback to guide continuous improvement.

Key Data and Governance Considerations

- **Multi-Factor Authentication (MFA):** Ensures secure user access.
- **Data Localization:** Ensures compliance with Canadian laws (e.g., PIPEDA).
- **Data Minimization:** Limits the collection of non-essential data to reduce privacy risks.
- **Real-Time Tracking:** Monitors program activities securely without compromising user confidentiality.
- **De-Identified Data Analytics:** Balances functionality with privacy by anonymizing personal information.

Case Study: Building Trust During the Pilot

During the CareShare pilot, it was noted that volunteers and community members might hesitate to provide their information on the platform. To address this:

- The data policy was explained to the pilot community, emphasizing how features like MFA, data localization, and de-identified analytics protect user information.
- Transparent communication about data use fostered trust among users and stakeholders while ensuring compliance with legal and ethical standards.

By prioritizing these safeguards, the pilot successfully built a secure, user-focused platform that met program goals without compromising privacy or trust.



Tips & Tricks

- **Involve Stakeholders:** Engage caregivers and volunteers early to identify key platform requirements.
- **Focus on Security:** Highlight security features such as MFA and data localization to build trust.
- **Simplify Interfaces:** Ensure the platform is user-friendly to encourage adoption and ease of use.
- **Leverage Feedback:** Use metrics and reporting to continuously refine the platform and improve user satisfaction.

Sample Rewards Plan – CareShare Co-op Pilot

The CareShare Co-op Pilot introduced a rewards and recognition system designed to encourage volunteer engagement while reinforcing the program’s core values of community care and mutual support. Rather than framing these incentives as financial compensation, the rewards model was structured as a gesture of appreciation, ensuring volunteers felt valued for their time and dedication. Throughout the pilot, we learned that while tangible rewards were appreciated, volunteers were primarily motivated by social connection, recognition, and a sense of purpose. Volunteers expressed that seeing the impact of their support on caregivers and care recipients was more meaningful than monetary incentives.

Milestone-Based Recognition

To acknowledge and celebrate volunteer contributions, the milestone-based rewards system was implemented during the pilot:

1. **Welcome Package:** Received after completing the training
2. **Milestone Rewards:** Earned after completing 5 services, and again after 10 services
3. **End of Pilot Celebration:** Community recognition and prize draws

While milestone-based recognition was implemented in the pilot, we also explored a points-based system to increase engagement flexibility. The proposed model allowed volunteers to accumulate points for each completed task and redeem them for various rewards.

Considerations for Flexibility and Sustainability

To ensure the long-term viability of a rewards model, key considerations were identified:

- **Balance Between Financial and Social Recognition**
 - While small financial incentives helped drive participation, social recognition and intrinsic motivation played a larger role in sustained engagement.
 - Community-driven recognition through peer appreciation, testimonials, and storytelling was highly valued.
- **Ensuring Accessibility and Inclusivity**
 - Rewards should align with volunteers’ personal motivations, offering flexibility in how they redeem incentives (e.g., training opportunities, wellness resources, or networking events).
 - Volunteers should be given the option to donate their earned points or rewards back to the community.
- **Scalability & Budget Considerations**
 - Maintaining cost-effective incentives (e.g., partnerships with local businesses for in-kind rewards) ensures sustainability.
 - Exploring corporate sponsorships could help support ongoing reward funding without relying solely on program budgets.

The CareShare Co-op Logic Model – Sample

Situation

Caregiving takes a toll on the physical, mental and emotional well-being of people providing care. These negative impacts not only affect unpaid caregivers (usually family members) but also the person receiving the care (their loved ones). Due to the lack of appropriate / timely support, almost 60% of unpaid caregivers report needing a break. The CareShare Co-op program provides volunteer supported respite, leveraging a digital platform.

Program Overall Goal

The overall goal of the CareShare Co-op program is to support unpaid caregivers through the provision of volunteer-based caregiver support in the form of respite solutions that are easily accessible, to improve their self-care, mental health, and overall quality of life.

Pilot Evaluation Goal

Conduct a feasibility assessment of the CareShare Co-op with the lens of acceptability by the volunteers and the caregivers.

Pilot Evaluation Questions

- Were the CareShare training, processes, Tools & Resources acceptable to the volunteers and caregivers? (*data sources*: Tuktū metrics, end of training and end of pilot surveys)
- Did the program meet the targets for recruitment and onboarding of volunteers, caregivers / loved ones? (*data sources*: program staff and Tuktū metrics)
- How can the program be improved? (*data sources*: interviews with caregivers, focus groups with volunteers)

(see table; pages 86-88)

Inputs			
<ul style="list-style-type: none"> Project lead and team within SE Petro Canada Funding Internal SE experts Marketing materials and assets 	<ul style="list-style-type: none"> Project lead and team within SE Pilot Site MOU Pilot site volunteers 	<ul style="list-style-type: none"> Digital Platform Partner (Tuktu) – MOU¹ Pilot Site team Training materials 	<ul style="list-style-type: none"> Corp. Partners Funding Lived-experience participants Planning tools



Outputs			
Activities		Metrics	
Caregivers <ul style="list-style-type: none"> Learn about the CareShare Co-op A sample will participate in the co-design Sign on to the app Make volunteer request for respite support using app Orient volunteer to activities to do with care recipient or errands to support caregiver Provide feedback and report on any issues, concerns or incidents 	Care Recipients <ul style="list-style-type: none"> Learn about the CareShare Co-op Participate in activities with the volunteer to relieve caregiver 	Caregivers (FCG) <ul style="list-style-type: none"> # of FCG² / seniors Recruited # of FCG signed on Tuktu # of seniors needing volunteers # of FCG with more than one senior on their account # of non-FCG signed on Tuktu # of request for respite # of types of requests and frequency # of single requests versus recurrent requests # of total visits per month # of total hours of service per month # of withdrawals (delete account) 	Care Recipients <ul style="list-style-type: none"> Care Recipients Recruited Qualitative Open-Ended interviews related to caregiver recipient satisfaction (Tuktu has in-built survey tool)
Volunteers <ul style="list-style-type: none"> Learn about the CareShare Co-op A sample of volunteers will participate in the co-design <p><i>(continued on next page)</i></p>	Planning Team <ul style="list-style-type: none"> Volunteers recruited Recruit 3-4 lived experience participants for interviews & journey mapping Conduct exploratory stakeholder discussions Facilitate 3 iterative co-design sessions Develop 3-5 strategic partnerships Establish respite co-design that is culturally sensitive and inclusive to pilot site <p><i>(continued on next page)</i></p>	Recruitment <ul style="list-style-type: none"> Volunteers recruited 	
		Onboarding <ul style="list-style-type: none"> # attended training but did not complete onboarding # completed onboarding # of volunteers on Tuktu that provided availability # of volunteers not on Tuktu that provided availability 	

Outputs (cont.)			
Activities (cont.)		Metrics (cont.)	
Volunteers (cont.) <ul style="list-style-type: none"> • All will undergo screening, training • Set up profile in the app • Provide availability through the app • Visit seniors as per matches and schedule in the app • Clock in and out when in the app • Complete summary note in the app • Ongoing support to caregivers / care recipients • Always maintain confidentiality • Report any incidents, issues or concerns to their building captain 	Planning Team (cont.) <ul style="list-style-type: none"> • Collaborate with stakeholders to develop recruitment criteria for caregivers, recipients, and volunteers • Promote CareShare in pilot site • Adapt existing digital tool for the program • Create matching process of care ambassadors to caregivers • Establish and offer mandatory training program and materials for volunteers • Develop reward / recognition system • Establish tools and processes for data collection, including dashboard 	Services <ul style="list-style-type: none"> • # of unique seniors the volunteer has visited • # of Visits made • # of hours of services provided • # of visits that did not get clocked in • # of visits that did not get clocked out • # of visits that got extended • # of different types of service provided (companionship, tech support, other) 	Retention / Recog. <ul style="list-style-type: none"> • # Completed 5th visit • # Completed 10th visit • # Completed pilot
		Inactivity <ul style="list-style-type: none"> • # of withdrawals (delete the account/the app) • # of volunteers in the time period with no availability provided • # of volunteers who did not provide any availability during the pilot period 	Experience <ul style="list-style-type: none"> • Satisfaction, challenges, barriers, areas for improvement
			Planning Team <ul style="list-style-type: none"> • Active participation of pilot site in co-design sessions provided • # of strategic partnerships established • Met targets for recruitment of caregivers/care recipients, volunteers • Usability testing results of digital App • Adoption and Engagement of App by volunteers and caregivers • Retention of volunteers • Score of Program Sustainability Assessment Tool • Feed



Outcomes - Impact
(continued on next page)

Outcomes - Impact		
Short (1 yr)	Medium (2-3 yrs) ³	Long (4+ yrs) ³
Impact on Caregivers <ul style="list-style-type: none"> • % of acceptability based on Sekhon et al⁴ • General • Comfortable • Burden • Effectiveness • Intervention coherence • Self-efficacy • Self-reported satisfaction and social inclusion 	<ul style="list-style-type: none"> • Expanded reach and participation • Replication in other communities with consideration of culture, norm and values of community • Increased awareness of caregiving needs • Secure permanent program funding and resources • Secure permanent CareShare Co-op digital solution ownership with third party • Increased sense of social connectedness and decrease in loneliness of caregivers 	<ul style="list-style-type: none"> • Systemic change in caregiving support • Reduced burden on healthcare system • Reduce health impacts of social isolation in seniors • Reduce ageism in the community • Established as national model • Achieve strategic social impact objectives SE Health • Spread and scale of program model + sustainability plan • Positive impact and influence on caregiver public policies
Impact on Care Recipients <ul style="list-style-type: none"> • Lubben Social Network Scale⁵ Outcomes (not during the pilot) 		
Impact on Volunteers <ul style="list-style-type: none"> • % of acceptability based on Sekhon et al⁴ • General • Comfortable • Burden • Effectiveness • Intervention coherence • Self-efficacy • Self-reported satisfaction and social inclusion • Volunteer satisfaction, perception of social inclusion • Intent to continue • Enhanced community connections • Enhanced knowledge and skills • Able to use experience as a reference for other work 	Assumptions <ul style="list-style-type: none"> • Caregivers willing to participate in a gig economy model for respite care • Corporations are interested in partnering with the program to offer rewards/incentive • Tech platform is user-friendly and accessible for all target audiences • Tech platform able to provide a dashboard with majority of the data for the identified metrics • Community members are willing to volunteer their time/skills • Appropriate agreements (data sharing agreements, participation agreements, legal etc.) in place between all parties • SE Health approves vendor providing tech platform • Pilot sites MOU signed off External Factors <ul style="list-style-type: none"> • Economic climate, social attitudes towards aging and caregiving, funding landscape, competing programs around the pilot site, government / policy impacts, disruptive technologies, political landscape and governance 	

1. Memorandum of Understanding

2. Family Caregivers

3. While the long- and medium-term impacts outlined in the logic model represent important aspirations for the CareShare model, they remain aspirational rather than measurable outcomes at this stage. Our work to date has focused on foundational efforts, with future evaluation needed to assess these broader, longer-term impacts.

4. Sekhon M et al., Acceptability of healthcare interventions: an overview of reviews and development of a theoretical framework. BMC Health Serv Res. 2017;17(1):88. Available from: <https://bmchealthservres.biomedcentral.com/articles/10.1186/s12913-017-2031-8>

5. Lubben J. Assessing social networks among elderly populations. Fam Community Health. 1988;11(3):42-52. Available from: <https://www.bc.edu/content/dam/bc1/schools/sw/lubben/LSNS6.pdf>



CareShare Co-op Sample Slides

Business Case – 2025

Overview of the Project

Objective: The CareShare Co-op is an innovative project designed to provide **free practical support and respite** to family caregivers and their older family members, whom they support.

Innovation: Using incentives to mobilize volunteers (neighbours/family/friends) to provide respite and support.

Key Features:

- Shared-economy inspired approach
- Builds a sense of community & facilitates mutual support
 - Facilitates access to free respite care
 - Links to existing caregiver supports/resources
- User-friendly digital tools
- Corporate collaboration



Expected outcomes

1

Increase support and respite care opportunities for unpaid caregivers; promotes caregivers' health and well-being

2

Enhance community engagement and stronger social connections among caregivers and care recipients; reduces feelings of isolation and stress

3

Access to **emotional support and valuable caregiving resources**; improves caregiver well-being and mental health

4

Strengthen sense of belonging and mutual support; creates stronger caregiving communities across Canada



3

The Problem

Caregivers are reaching their breaking point, even when they are receiving maximum home care and respite hours. They need more support...



Exhaustion



Insufficient public support
(Resources/hours)



Isolation/Loneliness



Financial burdens

The Challenges

Problem Statement

- In Canada:
 - The aging population
 - A shortage of formal healthcareworkers
 - The preference of older adults to age at homeare placing immense pressure on family caregivers, leading to significant mental health decline and burnout.
- Even with maximum publicly-funded supports (home and community care) caregivers need more help.



Can we develop solutions to support caregivers, ensuring they have the help they need to improve their quality of life and sustain their caregiving roles?



5

The Ideal

Caregiving is valued and appreciated, and caregivers are well-supported in their role.



Caregivers Benefits

- Quality time with loved ones
- Sense of fulfillment
- Sense of purpose
- Stronger family bonds
- More manageable caregiving responsibilities

Care Recipients Benefits

- Aging in place
- Intergenerational knowledge exchange
- Trusted care and quality time with family members
- Social connection

CareShare Co-op Model

CareShare Co-op Digital Platform

Community Co-Op



Co-op members support each other with practical tasks for respite. They use a secure digital tool to request help. Members who provide support bank their time and receive rewards.

Menu of Respite Offerings



Respite offerings may include:

- Meals
- Pet care
- Yard work
- Respite care
- Companionship & socializing
- Housework
- Phone & Video calls

Support Network of Caregivers



A support network may include:

- Peer to peer support
- Professional coaching and counselling
- Support groups
- Partnering with community caregiving organizations & caregivers with lived experience

Resources & Incentives



Co-op curates and enables resources from the broader caregiving eco-system. Co-op members who provide support bank their time and receive rewards. Corporations get involved to provide these incentives/rewards.

Guiding Principles: Human-centered design principles Shared economy Mutual support Social transformation

Volunteerism Age

-inclusive



7

Purpose of Co-Design Approach

- Bring stakeholders from across the continuum together to validate and build upon the CareShare Co-op prototype platform
- Gain new and specific insights on HOW CareShare could help caregivers (respite & support)
- Tailor the initial implementation to meet the needs of the community
- Build relationships and trust across continuum
- Establish champions and supporters within the pilot communities who will help promote and scale up the program



8

APPENDIX A-6:

Outreach Plan Checklist

Engaging potential partners requires a tailored approach that aligns their goals with CareShare's mission. Effective outreach highlights mutual benefits, demonstrates community impact, and fosters long-term collaboration.

Identify Potential Partners

- ☐ **Craft a Clear Value Proposition**
 - ☐ Emphasize how CareShare addresses caregiver burnout, enhances community well-being, and strengthens local networks
 - ☐ Use data from pilots to show measurable impact
 - ☐ Highlight alignment with partner goals – whether it's community engagement, corporate responsibility, or healthcare innovation

Establish Initial Connections

- ☐ **Tailor Messaging for Different Stakeholders**
 - ☐ Community Organizations: Focus on shared community benefits and service expansion
 - ☐ Funders: Highlight long-term outcomes, cost savings, and scalable models
 - ☐ Technology Providers: Emphasize opportunities to innovate and integrate existing platforms (e.g., Tuktu Connect)
 - ☐ Corporate Sponsors: Offer co-branding, recognition at events, and the opportunity to support volunteer incentives

Build Authentic Relationships

- ☐ **Use Success Stories and Case Studies**
 - ☐ Share insights from the community pilot to demonstrate real-world success
 - ☐ Incorporate quotes and testimonials from caregivers and volunteers to build emotional resonance

Listen and Learn

- ☐ **Host Information and Co-Design Sessions**
 - ☐ Invite stakeholders to community workshops where they can shape program development
 - ☐ Facilitate open discussions, aligning their contributions with CareShare's operational needs

Demonstrate Commitment and Involve Community in Decision-Making

- ☐ **Follow Up and Formalize Engagement**
 - ☐ Send follow-up emails after initial meetings, summarizing discussions and next steps
 - ☐ Develop Memorandums of Understanding (MOUs) that clearly define partner roles and contributions

Components of a Memorandum of Understanding

1. **Purpose and Scope:** Clearly state the overall objectives and vision for the partnership.
2. **Roles and Responsibilities:** Assign distinct responsibilities across each critical area:
 - a. Community and Program Administration: Who will support the administration and coordination of the program?
 - b. Volunteer Recruitment and Training: Who will lead training and manage volunteers?
 - c. Caregiver Engagement: Which partner is responsible for outreach and ensuring culturally appropriate services?
 - d. Technology and Data Management: Who will maintain platforms, ensure data privacy, and track service delivery?
 - e. Mutual Accountability: Ensure obligations are bi-directional, reinforcing shared responsibility for outcomes.
3. **Resources and Contributions:** Clearly outline what each partner will bring to the table, including:
 - a. Financial Contributions: Grants, sponsorships, or ongoing funding.
 - b. In-Kind Resources: Staff time, venues, transportation, and equipment.
 - c. Volunteer Support: Coordination of volunteers or community engagement.
 - d. Specify the value of in-kind donations to emphasize their importance and ensure recognition.
4. **Confidentiality and Data Sharing:** Establish guidelines for protecting sensitive information and sharing data responsibly.
5. **Decision-Making:** Identify decision-makers and specify the process for approving changes or allocating resources.
6. **Dispute Resolution:** Include a structured conflict resolution process that addresses:
 - a. Early mediation steps.
 - b. Escalation procedures for unresolved issues.
 - c. Mechanisms for revisiting and renegotiating terms as the partnership evolves.
7. **Duration and Termination:** Include specific milestones such as:
 - a. Volunteer onboarding dates.
 - b. Community engagement events.
 - c. Quarterly reports or performance evaluations.
 - d. Establish review periods to assess progress and adjust deliverables as needed.

Collecting Feedback

Key Feedback Methods

1. **Surveys:** Provide quick, measurable insights from a wide range of participants.

- **Caregivers:** Stress levels, satisfaction with services, emotional well-being.
- **Volunteers:** Role clarity, satisfaction, willingness to continue volunteering.
- **Care Recipients:** Social connection, satisfaction with support received.

When? Pre-service, post-service, and periodic check-ins.

How? Distributed electronically via email or platforms like Tukt Connect.

Sample Survey Questions:

- How satisfied are you with the support you received?
- Did the services meet your expectations?
- What could we do better?

2. **Interviews & Focus Groups:** Capture personal stories, insights, and experiences in more detail.

- **Caregiver Interviews:** Conducted by community with caregivers, building captains, and care recipients.
- **Volunteer Focus Groups**
- **Debrief Sessions:** Scheduled with community leads and broader stakeholders.

Key Discussion Points:

- What impact did the program have on you?
- What challenges did you face?
- How can we improve your experience?

3. **Platform Metrics:** Digital data provides valuable insights into program activity and user behavior.

- **Usage Patterns:** Logins, frequency of requests, time on platform.
- **Service Metrics:** Total hours of respite provided, types of requests.
- **User Trends:** Active users, account deletions, recurring service requests.

4. **Pilot Debrief Sessions:** Structured meetings to reflect on key lessons learned.

Focus Areas:

- What worked well?
- What challenges arose?
- What recommendations should guide the next phase?

APPENDIX A-9:

List of Potential Volunteer Services

This list was developed based on initial discussions with the pilot community and refined following legal review and liability requirements. The final selection of services was further distilled to align with community needs and considerations for insurance coverage.

Socialization

- Spending time with the care recipient (Talking or simply sitting and hanging out together)
- Play games / cards, doing puzzles, drawing / painting
- Short walks
- Reading to the care recipient
- Walk, TV, or listen to music together
- Eating a meal together (in the home)
- Singing together

Support at Home

- Light housekeeping (sweeping, wiping counters, putting garbage out, tidying, watering plants)
- Help with technology (facilitating video calls with friends/family far away)
- Laundry
- Changing lightbulbs
- Help with pets (short walks, cleaning litterbox)
- Opening and organizing mail

Help with Errands

- Drop off / pick up mail
- Goodwill drop-offs
- Pick up books at the library
- Pick up groceries, household products

What's Not Included

It is essential to clarify that volunteers are not providing formal medical care or personal support worker (PSW) services. Volunteers should not be placed in situations that require specialized training beyond the scope of the program.

Tasks that are not included:

- Personal care: shaving, nail care, hair cutting, supporting someone to use the bathroom
- Driving / transportation
- Making food for the care recipient
- Taking the care recipient out and about (if it requires driving)
- Medication monitoring or administration
- Medical or health suggestions/tips

Sample Process Flow – CareShare Co-op Pilot

Overview of the Registration Process



Figure 1: Sample CareShare Co-op Process Flow This flowchart maps out the key stages in the CareShare program, from registration to service delivery.

Step 1: Registration in Detail

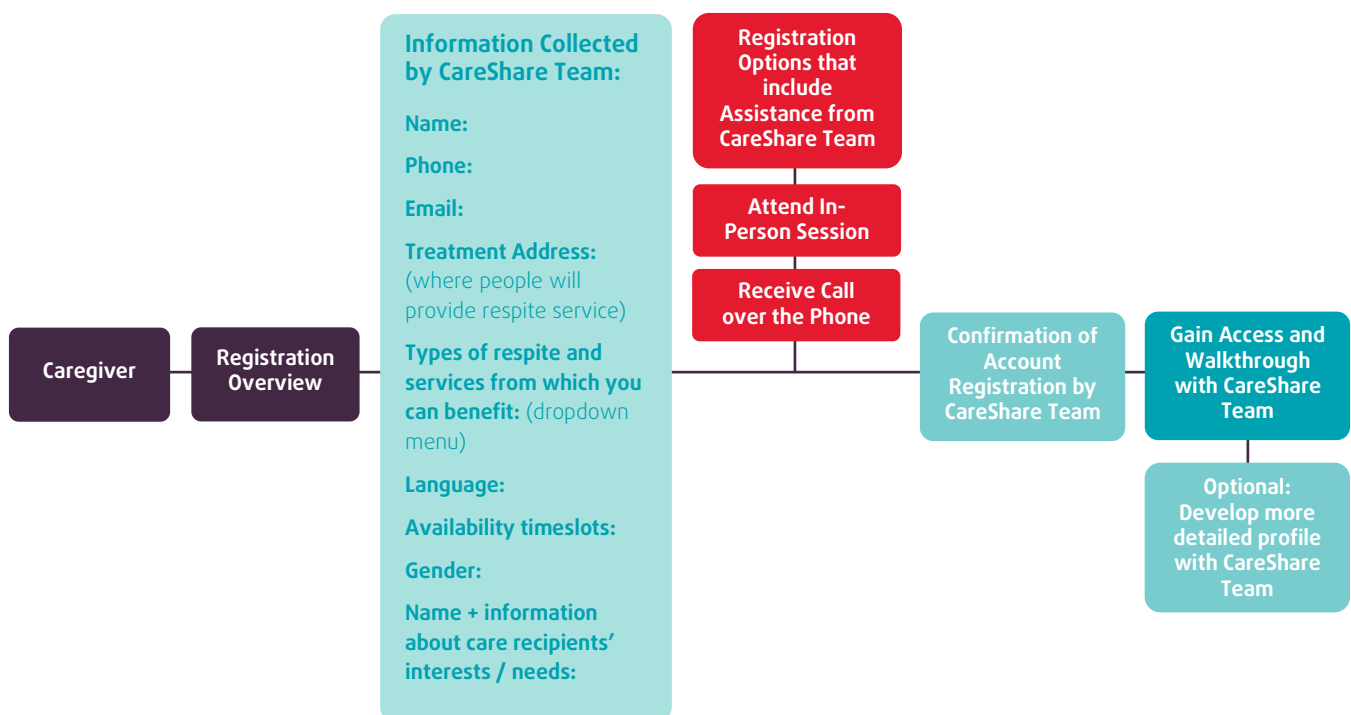


Figure 2: Sample of the Caregiver Registration Process This section breaks down the registration process into actionable components to ensure seamless onboarding for caregivers.

Sample CareShare Promotional Plan

Primary Objectives

- Inform and recruit potential participants of the CareShare program.
- Disseminate information on the implementation workshops.

Key Messages

For Caregivers:

- Feeling Stressed? CareShare offers free help and time off so you can recharge.
- Feeling overwhelmed? CareShare connects you with free support and respite care from caring volunteers.
- Access practical help and take a break with support from your community.
- Empowering Caregivers. Get the assistance you need to balance caregiving and your own well-being.

For CareShare Ambassadors (Volunteers):

- Make a Real Impact! Share your skills and support local families in need with CareShare.
- Be a community hero. Volunteer to provide vital support to caregivers in your community.
- Join the CareShare movement. Help build a stronger, more supportive community for everyone.
- Make a Difference & Get Rewarded! Share your time and skills with CareShare. Earn points redeemable for exciting rewards.

Universal Messages:

- Empowering caregivers together.
- Supporting caregivers, Strengthening Communities. The CareShare Co-op brings practical support and respite to family caregivers through community collaboration.
- Free Respite. Shared Support. Stronger Together. Our innovative share-economy approach mobilizes volunteers to provide free care and assistance.
- Helping Other Pays Off! With CareShare, your volunteer time with seniors translates to points you can redeem for great rewards.
- Give Back & Get Rewarded! Become a CareShare Ambassador, support your community, and earn points for valuable rewards.
- Attend our information sessions to learn more about how you can contribute.

Sample CareShare Outreach Flyer(s)

CareShare Co-Op

Supporting Caregivers. Strengthening Communities.



Calling All Volunteers



Become a CareShare Ambassador!

Your Compassion Can Make a Difference



Make a Real Impact!

Your time and companionship can bring joy to those who need it most. Volunteer with CareShare and support local families by offering the **gift of connection and social interaction.**

Be A Community Hero!

Volunteer to provide vital support and time off to caregivers in your community, by **offering your time** to spend with community members in need.





Join the CareShare Movement!

Help build a stronger, more supportive community for everyone. Your involvement as a CareShare volunteer helps create a supportive environment where everyone thrives. Be part of something bigger—join us today.

Make A Difference and Get Rewarded!

Share your time and skills with CareShare. Earn points redeemable for rewards.





Volunteering with CareShare is more than just giving time

It's about building meaningful relationships and strengthening the fabric of our community.

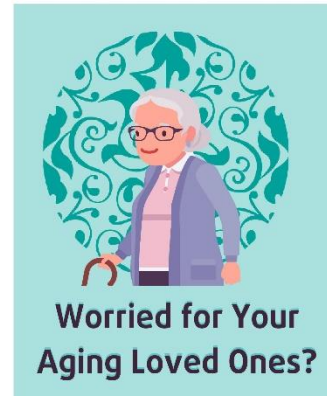
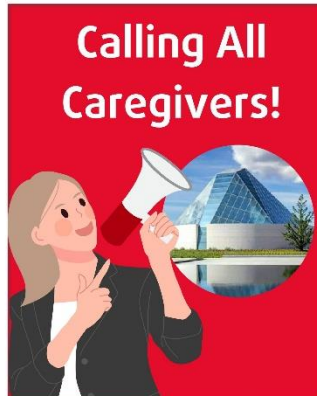
Sign up today and become a vital connection for those who need it most.

Free Respite. Shared Support. Stronger Together.

powered by  Health

CareShare Co-Op

Empowering Caregivers. Strengthening Communities.



CareShare offers **free companionship** and **respite** so you can recharge.

CareShare connects you with **caring & dedicated volunteers** who can provide **companionship**, offering them meaningful social engagement while giving you some relief.



CareShare was created to **help you find the balance** between caring for your loved one and taking care of yourself. Get the support you need to maintain your well-being and peace of mind.

CareShare is more than just a program; it's a **community-driven initiative** designed to support Murids and their families, ensuring that both caregivers and their loved ones thrive.



Free Respite. Shared Support. Stronger Together.

powered by



Health

Training Strategies

Effective training materials ensure that volunteers are confident, prepared, and aligned with CareShare's goals. Both in-person and online training formats should accommodate diverse learning styles and schedules to equip volunteers with the skills they need for success.

Training Options and Key Components

1. In-Person Training

- Covers project overview, roles, and responsibilities.
- Includes interactive icebreaker activities and practical demonstrations.
- Provides protocol reviews and a Q&A session for feedback.

2. Asynchronous Training (Self-Paced Modules)

- Includes project overviews, videos, and links to resources.
- Focuses on roles, responsibilities, and protocol reviews.
- Encourages reflection and feedback through guided prompts.

3. Online Training (Live or Recorded Sessions)

- Offers an overview of volunteer expectations.
- Features interactive elements like polls and quizzes.
- Includes protocol reviews and practical demonstrations.

Tips for Developing Training Materials

- **Tailor Content:** Adapt materials to suit the specific needs of the community and volunteers.
- **Use Multiple Formats:** Combine in-person, live online, and self-paced options for accessibility.
- **Promote Interaction:** Incorporate role-plays and Q&A to build confidence and address doubts.
- **Focus on Clarity:** Ensure all training materials are easy to understand and follow.
- **Update Regularly:** Review and refine training materials based on volunteer feedback and program evolution.
- **Use short quizzes** to ensure retention and completion of the training content.

Training Checklist

The CareShare training program is designed to comprehensively prepare volunteers for their roles, ensuring they are confident, knowledgeable, and equipped to provide meaningful support to caregivers and seniors. By combining in-person sessions, online Q&A, and asynchronous learning, the training addresses various learning styles and reinforces key competencies required for the CareShare initiative. Use this checklist to ensure your training is comprehensive:

Learning Objectives

Soft Skills

- ☐ Develop empathy and cultural awareness when engaging with caregivers and seniors
- ☐ Build trust through active engagement and understanding of diverse needs.
- ☐ Apply professional volunteer principles, such as setting boundaries and maintaining ethical standards.

Communication Skills

- ☐ Enhance active listening and non-verbal communication skills.
- ☐ Resolve conflicts using effective techniques and navigate challenging scenarios diplomatically.

Technical and Functional Skills

- ☐ Navigate the Tuktu platform for scheduling, reporting, and logging visits.
- ☐ Follow emergency protocols and uphold data security and confidentiality.
- ☐ Identify and report signs of abuse, neglect, or other potential hazards.

General Knowledge

- ☐ Recognize the value of caregiver respite and mental health awareness.
- ☐ Develop awareness of cognitive impairments and their signs (e.g., dementia, depression).
- ☐ Educate families on self-care, fall prevention, and companion-based supports.

Sample Pilot Training Schedule

- **Three (3) hours In-Person Training:** Covers program overview, role-play scenarios, and platform demonstration.
- **One (1) hour Online Q&A Session:** Open forum to address volunteer questions and clarify roles.
- **Self-Guided Modules:** Includes videos and training guides for ongoing learning.

Tips for Effective Training

- **Use interactive tool** to incorporate live platform demonstrations and discussion forum for engagement
- **Customize Learning:** Adapt modules to address specific community needs and volunteer roles.
- **Encourage Interaction:** Use role-play and Q&A to build confidence and clarify doubts.
- **Monitor Progress:** Track training completion to ensure readiness for deployment.
- **Provide Continuous Support:** Offer ongoing access to training resources for skill refreshers.

CareShare Co-op Pilot Evaluation Guide

Data Collection Mapping

Theory of Acceptability Constructs (Sekhon et al.):

1. **Affective Attitude:** Do stakeholders enjoy using CareShare?
2. **Burden:** Is participation manageable for stakeholders?
3. **Perceived Effectiveness:** Does CareShare meet their goals and expectations?
4. **Ethicality:** Does the program align with stakeholder values?
5. **Intervention Coherence:** Is the program understandable and logical?
6. **Opportunity Costs:** Are the time and effort worthwhile?

Mapping Exercise:

- Translate constructs into specific CareShare-related questions for each stakeholder group (about 6 per group).
- Identify collection points: pre-, during, and post-pilot surveys / interviews.
- Define formats: Likert-scale surveys, open-ended interviews, and platform analytics.

Caregivers: Semi-Structured Interview

1. Affective Attitude/Perceived Effectiveness:

- How has the CareShare Program made your life as a caregiver easier or less stressful (prompt: *workload, free time, stress level*)
- What do you like most about the CareShare Program (prompt: *using the app, meeting volunteers, how your loved one is supported*)?
- If you did not use the Tuktu app, could you please explain why?

2. Burden/Ethicality/Intervention Cohesiveness:

- How can we improve the CareShare program (prompt: *the overall app and its features, scheduling, communication*)?
- How do you feel that the CareShare Program has maintained your privacy and overall safety?

3. Opportunity Costs:

- Would you want to keep using the CareShare Program? Why or why not?

Care Recipients: Semi-Structured Interview

1. Affective Attitude/Perceived Effectiveness:

- Overall, was the CareShare Program a positive experience for you?
 - If so, why (Prompt: Easy to use the app, companionship activities, social interactions, visitations, benefits)?

- If not, why (Prompt: the app, companionship activities, social interactions, visitations)?
- What emotions / feelings do you have when you think about the CareShare Program?

2. Burden/Ethicality:

Did you experience any challenges in:

- Using the Tuktu Platform?
- Receiving visits from volunteers?
- Companionship activities?
- How can we improve the program?
- How do you feel the CareShare Program has maintained your privacy and overall safety?

3. Opportunity Costs:

- Would you want to keep using the CareShare Program? Why or why not?

Volunteers: Focus Group Discussion Guide

1. Personal Impact and Satisfaction (Affective Attitude & Ethicality - 10 minutes)

- How has volunteering with the CareShare Program impacted you personally?
- What parts of the program do you find most rewarding or enjoyable?
- How do you feel the CareShare Program supports the values that are important to you?

2. Challenges and Support (Burden & Intervention Coherence - 10 minutes)

- What challenges have you faced while volunteering with the CareShare Program?
- How do you feel about the support provided to help you manage your role?
- Was the process of volunteering (signing up, training, and making visits) easy and manageable?

3. Effectiveness and Benefits (Perceived Effectiveness & Opportunity Costs - 10 minutes)

- How do you think your involvement has affected the care recipients?
- Do you feel your time and effort has made a meaningful difference?
- What could be improved about the CareShare Program to make your role even more impactful?