

# **Marin Villages' Volunteer Manual**

## **Introduction**

Thank you very much for your willingness to volunteer your time to Marin Villages. Your invaluable assistance is what makes this organization thrive!

Marin Villages is a non-profit organization whose mission is to enable older adults throughout Marin County to remain independent in their own homes and communities with grace and dignity. We are an alliance of local villages which are formed based on geographic considerations. Currently we have local villages in Homestead Valley, Mill Valley, North San Rafael, Novato, Ross Valley and the Tiburon Peninsula.

Our volunteers are the foundation of the organization and key to its success. It is important to us that our volunteers are comfortable, confident and satisfied with their assignments. We hope this document provides you with some general guidelines and answers some frequently asked questions.

## **Objectives of the Volunteer Program**

1. To support the mission of Marin Villages by providing services which respond to members' needs.
2. To recruit and train qualified volunteers to fulfill services requested by members.
3. To nurture and build community and social ties between members and volunteers.
4. To provide volunteers with interesting and meaningful opportunities.

## **How to Become a Volunteer**

We welcome volunteers of all ages and hope to provide an intergenerational community service. You don't have to be a member to volunteer, but members often do volunteer.

To become a volunteer, Marin Villages requests that applicants:

1. Complete a Volunteer Application form, providing information on the kinds of services the volunteer is interested in providing, and the volunteer's availability.
2. Meet and/or talk with Marin Villages' (or the local village's) volunteer coordinator to review our procedures, expectations and processes and the volunteer's area of interest.
3. Sign a confidentiality agreement to ensure the privacy of Marin Villages' members (Appendix III).
4. Authorize Marin Villages to conduct a background check to ensure the security of Marin Villages' members, to protect the integrity of Marin Villages, and to meet insurance requirements.
  - a. Volunteer drivers will have a DMV check performed as well to verify they have a valid driver's license and a good driving record. We also require proof of adequate auto insurance.

Volunteers may not solicit business or other services from members. Under no circumstance will we accept volunteers with criminal records.

## Responsibilities of Volunteers

Marin Villages has a high regard for its volunteers and aims to support them in their assignments. We expect our volunteers to complete their assignments in an ethical, responsible and timely way. Volunteers agree to:

1. Keep personal information about members confidential in accordance with the Marin Villages' confidentiality agreement (Appendix III).
2. Be available to receive and respond to service requests by email.
  - a. We appreciate a quick response to our ride requests since our members worry about whether they will have a ride or if they will have to cancel an appointment.
3. Be prompt and reliable in meeting scheduled appointments.
  - a. Confirm your scheduled time with the member before going to his/her home.
5. Inform Marin Villages as soon as possible if you cannot keep a scheduled appointment, so alternate arrangements can be made.
6. Provide feedback on experiences, challenges, and opportunities for improved, expanded, or underutilized services.
7. Participate in volunteer training sessions.
8. Participate in meetings to help improve the service, response and experience of the members and volunteers.
9. Notify Marin Villages immediately if you have any serious concerns, experience difficult situations or feel uncomfortable when assisting a member.
10. Abide by and acknowledge Marin Villages' Harassment Policy as stated below:

Marin Villages is committed to providing an operational environment free of any form of harassment. Our policy prohibits sexual harassment and harassment because of pregnancy, childbirth or related medical conditions, race, religious creed, color, gender, national origin, ancestry, physical or mental disability, medical

condition, marital status, sexual orientation, age, gender or any other basis protected by federal, state or local law, ordinance or regulation. All such harassment is unlawful. Our harassment prevention policy applies to all persons involved in and with our organization and prohibits unlawful harassment by any staff member of our organization, as well as members of the Board of Directors and Advisory Council, members and volunteers.

## **Potential Services Volunteers May Provide**

We offer many types of volunteer opportunities, many of which depend on the request of the member and the abilities of the volunteer. Below is a list of our most frequently requested services, which may change in response to members' needs:

Local transportation	Home visits and companionship
Occasional errands	Minor household maintenance tasks
Pet care	Computer/technical device assistance
Office administrative support	

## **Other Volunteer Opportunities**

It is very important that our volunteers are energized and their assignments align with their interests. Our volunteers' time is too valuable to spend on 'tasks' that they don't find interesting. For those volunteers who enjoy planning, building programs and managing, we welcome assistance in our events and program planning, as well as local village and Board leadership.

Finally, we recognize that many of our volunteers have skills that they may want to share with our members. If you would like to design a program and/or event for members, we welcome your ideas.

## Frequently Asked Questions

## **Frequently Asked Questions and Answers**

### **What is the process for becoming a volunteer?**

All volunteers must complete an application/interest form and sign a confidentiality agreement. Once these are signed and submitted, either our volunteer manager or a local village volunteer coordinator will contact you to discover your level of interest in Marin Villages. During this discussion we will answer your questions and review our guidelines and policies. It is important to us that we meet your expectations and you support our mission. Marin Villages has a responsibility to make its best efforts to ensure volunteers have the best interest of the members at heart.

Depending on the types of services you are offering to provide, we will ask you to complete a background check and/or DMV authorization form. Once these checks are completed and the credentials are approved, we will welcome you as a volunteer of Marin Villages and provide you with a brief orientation.

### **Who does the background checks and investigations?**

IntelliCorp, a private company, will conduct criminal background checks and drivers' investigations for prospective volunteers. These types of inquiries are common for nonprofits whose volunteers will be working with seniors.

### **What information does IntelliCorp need to perform a basic background check?**

Intellincorp requires your legal name, address, Social Security Number, and date of birth.

### **What if I disagree with the information in my background check or investigation?**

You may dispute any findings by IntelliCorp and we will note this in your records; however, we will follow the IntelliCorp recommendations.

### **Will my personal information be kept confidential?**

Marin Villages is committed to ensuring the privacy of volunteers, members, and all others associated with our organization, consistent with our confidentiality agreement. Upon completing our review of the background checks, we “black out” all private information before filing the volunteer applications.

### **Does Marin Villages have adequate liability insurance to cover my volunteer services?**

Marin Villages maintains insurance coverage for a variety of circumstances. (Appendices I and II)

### **Who requires services at Marin Villages?**

Marin Villages provides volunteer services to members, who pay a fee to belong to our organization. Our members are considered to be ‘seniors’. Members live in Marin County and belong to a local village within Marin Villages’ alliance. Many of these members are no longer able to drive or safely complete tasks themselves. Some may have temporary disabilities, i.e. a surgery, or may need walking assistance, i.e. walkers, canes. All of our members are ambulatory.

### **Will I have a set schedule or need to commit to specific times for volunteering?**

Volunteers with Marin Villages volunteer when they are available. We do not ask for time commitments from our volunteers or ask them to be ‘on call’ for scheduled periods. Our volunteers can choose to assist when it is convenient for them and when the request is something they want to do. Our requests are sent in a way that other volunteers do not see who receives them or who responds, so there is no pressure. We want this experience to be a fulfilling, stress-free one for the volunteers.

## **How does a member request service?**

Members are asked to call the central office of Marin Villages (415-457-4633) to request services at least three working days before they are needed. They are asked to provide the details of the service, the date, pick-up time and duration. We record and track this information.

## **How will I be notified when a member requests assistance?**

We aim to match member requests with volunteer interest. Based on the information provided on the volunteer application, we will send an email to all volunteers whose interests match the member's request. We include the name of the member, date, time, type of request, destination and duration.

If you are available to assist with the request, all you have to do is reply to the email and indicate your availability. If you are not able to assist, you don't have to do anything and can delete the email.

We will confirm with you that you have been assigned to this request. This confirmation will include the member's address and phone number. We will, also, inform the member of the volunteer's name and phone number, should they need to make any last minute changes.

**We ask that you call the member the day before your scheduled appointment to confirm the appointment.**

## **What happens if I cannot make a scheduled assignment?**

Call us! We realize things happen in between accepting an assignment and the actual date. Call Marin Villages as soon as possible so we can schedule another volunteer. If you have an emergency immediately prior to your appointment time and are unable to contact someone at Marin Villages, we ask that you also call the member.

### **What if a member wants me to help him/her with other tasks?**

Politely remind the member that you are a volunteer and have scheduled your time around the original request. If the member needs other services, ask him/her to call the Marin Villages' office so we can arrange additional help. If you are o.k. assisting the member with the additional task, please just let Marin Villages know, so we can track and record your help. Remember, our insurance only covers activities managed and/or directed by Marin Villages.

### **I see a member regularly around town and have helped with various tasks. Should I report these to the office?**

Please! Marin Villages is funded, in part, by grants and donations. While we encourage community building and the development of friends, we would also like to track these activities so we can properly represent the contributions our volunteers make to the community.

If you help with a request that was not initiated from the office, please contact us and let us know. Our insurance only covers those activities that are scheduled and arranged by Marin Villages.

### **What if a member wants me to go into her/his wallet or purse to retrieve an item?**

There may be times when the member is unable to locate an item themselves. It is best not to go into rooms without the member present. Whenever possible, try to assist the member in finding the article themselves. If the member is unable to retrieve their own articles, have the member observe you while you are searching for their item.

### **How do we manage the exchange of money when I do an errand?**

If you do an errand for a member that requires you purchasing a product on their behalf, confirm the type/brand of the product as well as size with the

member. If possible, have the member make you a list of what is needed. Save the receipt and review it against your list with the member when you return. We will ask the member to write a check to you for the amount of the purchase. This will avoid exchanging cash, needing exact change or other issues.

If the member insists on giving you cash before the purchase, please write down the amount received in front of the member on the list of products. When you provide the change, reference the list and the amount received and count back the change.

### **What should I do if I suspect an incident of elder abuse?**

If you observe an incident that reasonably appears to be physical abuse, abandonment, isolation, financial abuse, or neglect, or are told by a member that he or she has experienced behavior constituting physical abuse, abandonment, isolation, financial abuse, or neglect, or reasonably suspects abuse, you should report this immediately to the staff at Marin Villages.

For further information contact Marin Villages at 415-457-4633 or send an email to: [marinvillages@marinvillages.org](mailto:marinvillages@marinvillages.org)

## **Volunteer Driver Questions and Answers**

## **Volunteer Driver Q & As**

Many of the questions volunteer drivers have are the same as other volunteers. In this section we aim to address only those that are specifically related to transporting members.

We want you to feel completely comfortable as a volunteer-driver for Marin Villages. If at any time, something is not clear or you need more information, please ask. The seniors that you are helping are sincerely grateful for your services and so are we!

### **Who requires rides at Marin Villages?**

Most of our members requesting this service are no longer able to drive themselves. Some may have temporary disabilities precluding them from driving. Some members may need walking assistance, i.e. walkers, canes; however, all are ambulatory.

### **If I have been in a traffic accident or received a speeding ticket, does this disqualify me from being a volunteer driver?**

We use the following criteria to qualify our drivers:

- Three or more years of driving experience
- A current and valid California driver's license
- No license suspensions or revocations within the past 5 years
- No major driving violation including DUIs, reckless driving, hit and run, excessive speeding violations during the past 5 years
- No more than 1 at fault accident within the past 3 years
- No more than 2 minor moving violations in the last 3 years
- A copy of your insurance declaration page showing \$100,000/\$300,000 or more in coverage.

If you do not qualify as a volunteer driver, you are still welcome to provide other services.

## **Does Marin Villages provide insurance for me while I serve as a volunteer driver?**

We require that volunteers carry their own insurance and will depend on their insurance as the primary coverage. If a volunteer driver is involved in an auto accident, he/she must file first with his/her own insurers. Marin Villages provides a separate 'excess' policy which insures our volunteers in case of serious accident while providing volunteer-driver services for Marin Villages. (See Appendix I and II.)

## **Can I get a tax deduction for my mileage and other expenses incurred by providing services for members?**

The IRS currently allows volunteers to deduct unreimbursed out-of-pocket expenses, such as the allowable cost of mileage, directly-related parking fees and tolls. You are not allowed to deduct the value of your time. If you decide to deduct these expenses, you should keep a record of such expenses and confirm the current IRS-allowable deductions and rates. Volunteers should not depend on this manual for tax deductibility information.

## **What if I arrive and the member won't go with me or does not answer the door?**

Assure the member that you are from Marin Villages. If the member does not want to go with you, call Marin Villages' central office. If you do not get a response after ringing the doorbell/knocking for a reasonable amount of time, call the member. If you still have no response, call Marin Villages' central office. If you are unable to connect with our staff at the central office, you should consider calling the local police and asking for a Health and Safety check. They will then send someone over to check in on the member.

### **What if I arrive at a member's house and he/she is non-ambulatory?**

Anytime a member appears unable to walk, is having difficulty with balance and cannot walk safely, or seems too ill for you to assist, call Marin Villages' office. We want you both to be safe. It is suggested that you simply state that you feel uncomfortable driving the member, and will call the office.

### **What if there is an accident?**

Use your good judgment. Quickly assess the situation. If the member has fallen, stay with the member and do not move him/her, call 911 and then call Marin Villages' central office at the earliest time you can do so safely. If you and the member are involved in an automobile accident, follow the same procedure. If you are injured, call 911 and ask the member to stay in place until help arrives.

### **What should I do if the member offers me payment for the ride?**

Our program is set up and insured on the basis of the volunteer providing his/her own vehicle without charging fees to the member. However, if the member offers to pay the toll, parking lot or other charges that would be acceptable.

Volunteers can suggest that if a member really feels they would like to pay for services, donations to Marin Villages are always appreciated.

## **VOLUNTEER DRIVER TIPS**

## **VOLUNTEER DRIVER TIPS**

Some of our members may be more mobile than others. It is important to respect the member's independence while keeping their safety in mind. Always ask the member if they need help first. Some members just may not be able to drive and are able to manage alone once you reach your destination. Other members may need more assistance – with walking, getting in and out of the car and carrying items.

### **BEFORE you pick up your member:**

1. Call the day before your scheduled ride to confirm time and purpose of trip. Ask them if they have a parking placard, and if so, to bring it.
2. Make sure:
  - a) you have sufficient fuel
  - b) you know where you are going, look up both points on a map
  - c) the passenger side of your car is free of debris
  - d) you review your directions to minimize referring to them while you are driving.
3. Write down the member's name, address, and phone number and Marin Villages' number to have with you, for use in case of emergency.

### **WHEN you arrive at the member's place of residence:**

1. Park as close to the front door as possible, making sure there is enough space for the passenger door to fully open.
2. If you park next to a curb, make sure the member will have adequate room to step and turn on the pavement below the curb.

### **WHEN the member opens door:**

1. Make sure to ask the member if he/she “has everything they need” (house keys, medical ID cards, wallet, etc...)
2. Walk with the member to the car and assist him/her into the passenger seat (PROTECT MEMBER’S HEAD!)
3. Ask if the member needs assistance in securing the seat belt.
4. Make sure the member is secured in the seat, and place his/her equipment (cane, walker, crutches) in the trunk of your car.
5. Review the directions to your destination before you start the engine.

### **When at an appointment:**

1. Ask the member if he/she needs assistance or an escort into the appointment.
  - a. If the member is mobile, park the car close to the entrance and confirm the time and place of pick-up.
  - b. If the member requires assistance to their appointment, temporarily park near the entrance and assist your member to a safe seat inside or outside, weather permitting. If there is no seat, park in a parking space as close as possible and walk with your member to his/her destination. When safely inside, confirm pick-up time.
  - c. If you do not wait for the member but are returning to take him/her home, leave your cell phone number with the member and/or receptionist, just in case they need to contact you.

### **When grocery shopping:**

1. Ask the member if they need assistance while shopping, if so, stay with your member while they shop. If not, decide on a time/place to meet.
2. Ask member if he/she wants to push the cart. He/she may want to manage things him/herself.
3. Help remove items from shelves and place in cart, if requested.
4. Regardless of who pushed the cart in the store, please push it once you leave the store.

5. If the member is not very mobile, help member into car and then load groceries.
6. When you arrive back at member's home if needed, help member into house first, and then carry in groceries and place on the counter or table where member designates.

AND REMEMBER:

- Always stay within an arm's length of your member's shoulder in case you need to react immediately.
- Do not do anything you do not feel safe doing.
- If anything unexpected happens, or if you have any questions, or need help, call Marin Villages' office 415-457-4633
- In an emergency, stay with the member and call 911 immediately.
- Do not take possession of a member's handbag, wallet, jewelry or other valuables, even at the member's request.
- Have a good time and enjoy the experience. You are providing a wonderful service and making a huge difference in his/her life!

## **Considerations with Aging**

**The following section summarizes physiological changes experienced as we age. It is not intended to provide in-depth explanations of physiology or address all aspects of aging, rather it provides an overview of topics discussed during the actual training session.**

## Considerations with Aging

Aging is a lifelong phenomenon to which most people don't give much thought until they are considered "a senior", "elderly", or older adult. One person was quoted as saying, "I never thought of myself as a senior until I had to give up my driver's license."

As many of us are reaching ages of 80 and 90 years, we are experiencing the impact of aging for the first time. Aging is not a disease. Everyone ages differently so there is no one profile of a senior adult. There are, however, physiological changes that do affect most adults and can present issues around safety, comfort and well-being. The following section briefly touches on considerations when working with older adults.

**Hearing** - One in three adults over age 65 has some degree of hearing impairment. Two-way communication is important for both parties' safety. Helpful hints:

- Speak directly to the person's face, not into their ear, to support lip reading
- Don't assume you need to shout – it won't clarify any words
- Speak clearly and slowly
- Keep hands away from your face while talking
- Turn off/down radios
- Lower your voice pitch

**Vision** – Be aware of your surroundings when you are walking with a senior. They may not be able to differentiate changes in sidewalk levels or stairs. Their eyes are more sensitive to glare and small print is harder to read. "Be their eyes." Look ahead and anticipate.

**Skin** – People's skin changes with age. It becomes thinner, loses elasticity, is unable to retain fluids as easily and becomes dry. Wounds are slower to heal and easier to incur. It is more difficult to distinguish changes in temperature,

stay warm and tolerate temperature changes. If an older adult is cold and begins to shiver, this shivering can lead to loss of balance. Always ask if the senior is comfortable.

**Body Structure** – We may become shorter, our hips broaden and shoulders become narrower. People may not be aware of these changes to their own bodies. When possible, choose a chair with arms so the senior can guide her/himself gently into the chair.

**Taste and Smell** – With age one's sense of taste and smell can change. Loss of taste can alter eating habits, creating higher likelihood of malnourishment, and result in tiredness, weakness, and problems with balance, irritability and stubbornness.

**Driving a senior** -- Make sure the passenger is comfortable with the temperature in the car. Adjust for the senior and open your window if needed. Shivering can lead to a loss of balance.

Lack of familiarity with a vehicle can cause a senior to misjudge the car door frame and injure him/herself. Protect him/her by discreetly putting your hand over his/her head when entering or exiting the vehicle. Don't park next to a curb where a senior may have to "plop" down into the car seat. Leave room for the passenger to step down and gently sit into the seat. Seniors have experienced bone fractures when allowing themselves to 'plop' into a seat.

If a senior is behaving very different from what you know as 'normal', let the central office know. It may be nothing, but it may be a concern we can follow up on.



# Appendices

# Appendix I

## Auto Insurance Coverage Requirements for Volunteer Drivers

To be authorized as a driver, a volunteer must:

- Have a valid driver's license
- Show annual proof of automobile liability limits, which are:
  - o \$ 100,000 per person for Bodily Injury
  - o \$ 300,000 per accident for Bodily Injury
  - o \$ 50,000 for Property Damage
  - or-
  - o \$ 300,000 Combined Single Limit Bodily Injury & Property Damage
- Prove insurance is current by supplying the Marin Villages with the face sheet (declarations page) of the volunteer driver's auto policy showing at least the bodily injury and property damage limits noted above.
- Have an acceptable driving record as defined below:
  - o Three or more years of driving experience;
  - o A current and valid California driver's license;
  - o No license suspensions or revocations within the past 5 years;
  - o No major driving violation including DUI or any reckless driving, hit and run, excessive speeding violations during the past 5 years;
  - o No more than 1 at fault accident within the past 3 years;
  - o No more than 2 minor moving violations in the last 3 years
- Ensure that all vehicle occupants wear seatbelts, comply with all other California motor vehicle laws, including those pertaining to cell phone use, speed limits, rights of way, and safe entry and exit from the vehicle.

## Appendix II

### Marin Villages Insurance Coverage

Marin Villages maintains several insurance policies to help protect the assets of Marin Villages and its local villages, and many provisions of those policies also benefit our volunteers and members. Below highlights the relevant policies:

**Commercial General Liability** – This policy is purchased in case of damage resulting from bodily injury or property damage which leads to a claim against the organization, including claims by members and volunteers as well as outside parties. We currently have a liability insurance limit of \$1,000,000, with a \$2,000,000 annual aggregate limit. Certain sublimit may apply. We also have an excess general liability policy (umbrella policy) with a separate \$2,000,000 annual aggregate limit above the commercial general liability policy. Example of usage: If we damage premises during a function sponsored by Marin Villages, a \$500,000 limit applies.

**Volunteer Accident Insurance** – We have a separate excess policy that insures our volunteers in case of serious accident while volunteering for Marin Villages. This policy is over and above any health or accident insurance the volunteer carries and typically is used to cover deductibles and out-of-pocket expenses. This coverage ranges from minor dental injury up to and including accidental death or dismemberment, the latter having a \$50,000 coverage limit. All such claims must be filed within 52 weeks of occurrence.

**Auto Liability Insurance** - All volunteer drivers are required to have current auto liability insurance in amounts not less than \$100,000/\$300,000 and an acceptable driving record. The volunteer's own insurance is the primary insurance to be relied upon in case of accident while using the vehicle to transport a member. Volunteers involved in auto accidents must file first with their own insurers, though as secondary insurance we maintain a \$1,000,000 excess auto liability policy. The \$2 million umbrella policy also

applies to the auto policy, potentially adding to our coverage limit. Volunteers who become involved in accidents while driving need to complete forms available from the Marin Villages' office.

***Other Insurance Coverage*** – Marin Villages also maintain Directors and Officers and Employment Practices Liability insurance in order to attract highly qualified individuals to our Board and staff. As our presence grows in Marin County, the Marin Villages' Board of Directors will continue to assess the insurance needs of the community organizations it serves and provide accordingly.

This summary does not include all the terms, conditions and exclusions of each separate policy described above. The actual policies need to be read for complete details.

## Appendix III

### MARIN VILLAGES VOLUNTEER AND CONFIDENTIALITY AGREEMENT

By submitting this application, I affirm that the facts set forth in it are true and complete. As a Marin Villages volunteer, I agree to the following:

1. I agree to conform to all Marin Villages' policies, rules and procedures.
2. I understand that if I am accepted as volunteer, any false statements, omissions or other misrepresentations made by me on this application may result in immediate termination of my service as a volunteer.
3. I will offer my time without monetary compensation.
4. I authorize Marin Villages to contact my references and perform a background check, including my driving record and any criminal records, if necessary. I understand that all such information collected in my background check will be kept confidential. Any references contacted have my permission to provide their candid evaluation of my suitability for the described volunteer work.
5. As consideration for volunteering for Marin Villages, I agree to indemnify Marin Villages against and hold it harmless from all loss and expense arising out of any act, neglect or fault on my part in the course of volunteering. I further agree that I, my assignees, heirs and legal representatives will not make any claim against or sue Marin Villages, its officers, directors, employees, agents or contractors for injury or damage resulting from my act, neglect or fault as a volunteer. I HEREBY RELEASE AND DISCHARGE MARIN VILLAGES AND ITS OFFICERS, DIRECTORS, EMPLOYEES, AGENTS AND CONTRACTORS FROM ALL ACTIONS, CLAIMS OR DEMANDS THAT I, MY ASSIGNEES, HEIRS AND LEGAL REPRESENTATIVES NOW HAVE, OR MAY HAVE IN THE FUTURE, FOR INJURY OR DAMAGE RESULTING FROM MY VOLUNTEERING. I FURTHER UNDERSTAND THAT, IF I AM INJURED IN THE COURSE OF MY VOLUNTEER WORK FOR MARIN

VILLAGES, I AM NOT COVERED BY ANY WORKERS' COMPENSATION PROGRAM AVAILABLE TO MARIN VILLAGES EMPLOYEES.

6. As a Marin Villages volunteer I understand that it is imperative to protect the confidentiality of all information pertaining to any Marin Villages member, non-member or other volunteer or client associated with Marin Villages, and that any unauthorized possession, use, copying, reading or disclosure of applicable records, ledgers or files is prohibited and grounds for immediate termination of my service as a volunteer.
7. I hereby authorize Marin Villages to use any photographs taken of me while I am engaged in Marin Villages activities on its website and in publications and to release such photographs for publication in newspapers, magazines, and other printed materials without notice or compensation to me, my heirs or assigns. I further understand that my consent to such release extends to the use of such photographs by any local village affiliated with Marin Villages.