

# **SOUTH WHIDBEY AT HOME**

## **Volunteer Handbook**



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## **WELCOME TO THE SOUTH WHIDBEY AT HOME VOLUNTEER COMMUNITY**

On behalf of the Board of Directors, Members, Volunteers, and Program Coordinator, we welcome you to our community of volunteers at SW@H. Thank you for offering your time, commitment, and talent on behalf of elders in our South Whidbey community. Volunteers are the life-blood of SW@H. We would not be here without you.

South Whidbey @ Home is part of a national movement born out of the desire of older adults to stay safely in their own homes as long as possible, with the help of generous volunteers. Called the “Village Movement”, it began in Boston in 2002 and has grown to over 250 villages around the country, with over 150 in development. SW@H grew out of a community meeting on south Whidbey in 2015 and opened in July, 2016. We serve the geographic area south of Classic Road in Greenbank. We have one part-time staff member: Program Coordinator.

The annual fee for an individual or couple to be Full Members is \$240, which entitles them to volunteer services (usually no more than 2 per week), referral to Trusted Businesses, and social/educational opportunities. Supporting Membership is also \$240, which does not include volunteer services but does include access to Trusted Businesses and social/educational activities.

### **MISSION STATEMENT**

South Whidbey at Home is a membership-based nonprofit dedicated to helping older (55+) South Whidbey residents remain in their homes and active in the community by providing access to volunteer assistance, referrals to vetted professional services, and social activities. We are committed to improving the well-being of our Members by connecting people of all ages in a mutually beneficial way.

### **VALUES AND OPERATING PRINCIPLES**

- We collaborate and partner with other organizations so that gaps are filled and services are not duplicated.
- We strive to do the best we can with an attitude of compassion, respect, dignity, and acceptance.
- We respect the privacy of our Members and Volunteers and maintain the confidentiality of all personal information provided us.
- We are open to, and consistently seek, better ways of doing things.
- We work to ensure the personal safety of Members and Volunteers.
- We recognize when a situation is beyond the scope of our mission.
- We consider ourselves to be a part of an ongoing circle of giving and receiving.
- We depend primarily on local donors. Their support is a measure of how the community values our work.

- We are inclusive, accepting of our Members and Volunteers regardless of gender, sexual orientation, financial status, or spiritual choices.
- We look for a variety of ways in which people can connect and contribute.

### **VOLUNTEERS HAVE THE RIGHT TO:**

- Find opportunities for meaningful volunteer work that is a good match for their skills and interests
- Receive orientation and on-going support
- Be informed about relevant information that may impact their service
- Refuse to do a service that would jeopardize a volunteer's health or safety
- Give permission before SW@H authorizes checks of background or driving records

### **VOLUNTEERS HAVE THE RESPONSIBILITY TO:**

- Sign and abide by our Volunteer Code of Ethics (Appendix A)
- Volunteer at least twice a month if possible
- Be prompt and reliable
- Never discuss a Member's identity, personal situation, services needed or any other personal information with anyone other than the Program Coordinator or a Call Manager.
- For service volunteers, respond to Service Requests asap (usually within 24 hours), letting us know whether or not they can volunteer for that request
- For service volunteers, call the Member the night before or morning of the service to confirm
- Give feedback to the office staff if they encounter a situation of concern with a Member, e.g., deteriorating ability to function, potentially dangerous situation
- Send an email to the office at [callmanager@swathome.org](mailto:callmanager@swathome.org) or call the office after each interaction with a Member, to let us know how it went and how much time it took.
- Let the office know when they will be away, so that we won't send a SR (Service Request)
- Decline any monetary gifts
- Do not deal with Members' financial information
- Wear a photo ID badge when providing service to a Member

# **VOLUNTEER CATEGORIES**

## **SERVICE VOLUNTEERS**

Service Volunteers provide direct assistance to Members. The Volunteer application includes a place to select which services the Volunteer chooses to do. These are just a few of the possibilities:

- Drive Members to medical appointments, shopping, the library and errands
- Run errands, such as light shopping, recycling
- Friendly visits to read or chat with a Member or provide a brief respite for a Member who is a primary caregiver
- Light home maintenance and minor repairs
- Home organizing, assistance with paperwork
- Technological help with, e.g., computer, printer, cell phone
- Temporary pet care
- Light gardening advice and help

There is a Handbook with specific information for Drivers

## **CALL MANAGERS**

Call Managers are the voice of South Whidbey at Home. They answer Members' calls for services, make referrals, coordinate volunteer scheduling, and provide office support. They also respond to questions from the general public and provide information to potential Members and Volunteers.

Call managers' time commitment is usually one half-day per week. They are scheduled in shifts Mondays through Fridays during business hours. They are trained to use our web-based computer software to schedule and assign service requests and make referrals.

There is a document with specific information for Call Managers.

## **AMBASSADORS**

Ambassadors visit potential Full Members in their home to explain our services and limitations and to assess whether our organization is a good fit for the individual/couple. If so, they complete a Member information form and enter the information into Club Express, our web-based program. They discuss what kinds of help Members foresee needing.

There is a Handbook with specific information for Ambassadors.

## ASSIGNMENTS FOR SERVICE VOLUNTEERS

There are two ways to receive a service request:

- An email
- A phone call from a Call Manager

Our web-based software, Club Express, has data that allows us to send a request to a few volunteers at a time. The request will include the Member's name, address and contact information. It is important for volunteers to respond to the email asap. The first volunteer to accept the SR receives a confirmation email. Members do not receive volunteers' contact information and we discourage volunteers from providing it to them. Members should call the office if they have to cancel the request or add another service.

### WHAT WE DO AND DON'T DO

The white single-fold Member Information brochure spells out the broad categories of what we do and don't do. Members receive this brochure when they become Members.

One of the most frequently requested services is driving. (We only drive on island.) Home repairs, recycling, social or respite visits, and tech assistance are often requested. Help with organizing and/or simplifying does not include helping Members with garage sales and/or preparing their homes for sale.

We do not do personal care or anything that should be done by a licensed professional or paid care provider. We do not do financial work, major cleaning, lawn-mowing, climbing tall ladders, or anything that might put volunteers at risk. We do not assist Members to hold garage sales or pack and move, since our mission is to help people stay in their homes. Members must be able to transfer in and out of cars by themselves. Volunteers do not transport wheelchairs or mobility scooters. Members must be able to rise from a seat of the car with only standby assistance. Volunteers can help steady them once they are up. Volunteers do not use a gait belt. If a Member cannot get out of a car alone, they are eligible for Paratransit services rather than South Whidbey at Home Volunteer assistance.

**If a Member falls or needs medical care, call 911 and then notify  
the SW@H office**

If a Member falls while you are with them, call 911 and do not attempt to move them. Use common sense, but do not do anything that could cause further harm. Remember that some elders are fragile and may have weak bones.

## **BOUNDARIES AND SETTING LIMITS ON TIME**

Generally, service requests will not exceed two hours and are limited to the task(s) that the Member originally requested. If a Member asks a Volunteer to do additional tasks, the Volunteer can decide whether to do it or not. If it is not convenient, the Volunteer should respectfully decline and suggest that the Member call the office to arrange for an additional SR. (Members are cautioned not to add tasks to the original request.) Always feel free to discuss any concerns you have with the Call Manager.

While we encourage friendships to develop among Members and Volunteers, service requests should come through the Call Managers. A Member may not ask a Volunteer directly for a service. If this occurs, please notify a Call Manager. Volunteers should not feel obligated to fulfill every service request, even if the requesting Member has become a friend. Volunteers should notify the Call Manager if they feel a boundary has been crossed, and staff will work with the parties involved to resolve the situation.

## **POTENTIAL PROBLEMATIC SITUATIONS**

- Member asks for more than was covered in the service request. This one's up to you. If it's something quick and easy like stopping at the drug store to get a prescription on the way home from the doctor, or stopping at the post office after getting groceries, feel free to do it if you have the time. If the member wants you to move the furniture around in the living room when the request was for a light bulb change, ask politely to make that additional service request to the call manager for another Volunteer.
- Job takes longer than expected. Our expectation is that a service will take no more than a few hours at most. If the service takes longer than that, or longer than you signed up for, you can ask the Member to call us with another service request (and probably another volunteer) to finish.
- Member is not ready when you arrive. It's important to call the day or night before to confirm the time.
- Member asks you to come back again. Reply that additional requests must go through the Call Manager. You can let us know if you want to take it yourself or not. One of the reasons we don't give the phone number of a Volunteer to the Member is to protect you from their calling you directly.
- Member is in a wheelchair. Volunteers do not lift Members or lift and transport their wheelchairs. Let the Call Manager know if this occurs. Paratransit is available for people with wheelchairs.
- Member offers you a tip or a gift. Our volunteers cannot accept money or other monetary gifts. You may accept baked goods.
- Job is beyond your skills. It's fine to evaluate the situation, then call the office and say, "I can't do this job. I don't know how/it's not safe/it needs a pro."
- Service Request for help with paperwork turns out to include financial information. For your protection, do not do any work that exposes you to a

member's Social Security information, passwords, bank accounts, or other financial information.

- Member seems to be unsafe or unwell. Call the Call Manager during office hours or 911 if it seems warranted.
- Service Request doesn't contain all the information you need. Just call or email the office and we'll answer your questions.

## **MEMBER REQUESTS FOR SERVICE BEYOND SW@H**

On rare occasions, a Volunteer might agree to provide services or goods to a Member that is outside the scope of SW@H, whether for compensation or not. In this case, the Volunteer and Member must sign an Independent Contract specifying that these services are outside the scope of SW@H. See Appendix B and C for further information and for a copy of the Contract.

## **TERMINATION**

South Whidbey at Home may dismiss a Volunteer for failing to fulfill the duties of their position and/or to meet the basic standards set by the organization. Grounds for dismissal may include but are not limited to: misconduct or insubordination; being under the influence of alcohol or drugs while volunteering; theft of property or misuse of the organization's property; verbal or physical abuse of Members; failure to fulfill Volunteer obligations; and breach of confidentiality.

## APPENDIX A: VOLUNTEER CODE OF ETHICS

The Volunteer program at South Whidbey at Home is designed to provide Volunteers with rewarding experiences. The following principles are intended to guide you when you are providing services to Members.

- Volunteer agrees to act at all times in accordance with South Whidbey at Home's Mission, Values, and Operating Principles.
- Volunteers respect the privacy of Members and maintain confidentiality regarding Members at all times.
- Volunteers will treat Members, their family members and others with respect and courtesy.
- Volunteers do not use obscenities, derogatory comments based on race, color, religion, disability, sexual orientation, gender, national origin, or ancestry.
- Volunteers do not engage in verbal or physical threats or any action that may be dangerous or create a health or safety concern,.
- Volunteers agree to perform only the service to which they are assigned by a Call Manager. If a Member requests further service, the Volunteer must ask the Member to phone a Call Manager for assistance. Call managers schedule all Volunteer assignments and Volunteers are not expected to accept any additional unscheduled requests from Members.
- Volunteers agree not to offer professional advice or engage in further services to Members unless both the Member and the Volunteer sign an Independent Contractor form (see Appendix B.) Volunteers will inform the Call Manager of this agreement.
- Volunteers will not promote his/her personal services and will not accept gifts or loans from Members.
- South Whidbey at Home respects the cultural, religious and political views of its Members. Volunteers refrain from trying to impose their own views on Members.
- Volunteers call the office if they have concerns regarding the safety of a Member or of themselves.

Volunteer name: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## **APPENDIX B: VOLUNTEER SERVICES BEYOND THE SCOPE OF SW@H**

A potential conflict of interest may arise when a Volunteer goes beyond the scope of the SW@Home agreement to help a Member. This includes situations when a Member asks for additional help from the Volunteer. It may or may not include compensation for these extra services, which are not covered under the SW@Home liability policy.

If the Volunteer is willing to provide requested goods and services outside the scope of SW@H, an Independent Contract between the Member and Volunteer must be entered into that specifies that the Volunteer is working without liability coverage from SW@Home and beyond the scope of his/her role as a SW@Home Volunteer.

The Volunteer will notify the Call Manager or Program Coordinator of the new relationship between the Volunteer and the Member. The Volunteer will provide a copy of the Independent Contract, which will be placed in the files of both the Member and Volunteer. A note of such will be placed in the monthly log.

All requests must be initiated by the Member. Any solicitation or offer by the Volunteer will constitute a breach of the SW@H Code of Ethics and may result in the Volunteer's termination from the program.

All Volunteers who provide goods and services for compensation as part of a regular business shall be encouraged to register with SW@H as a Trusted Business.

If the requested goods or services are outside the scope of those usually provided by the SW@H, and the Volunteer is a Trusted Business, the Volunteer will instruct the member to notify the Call Manager of his/her need and ask for a referral to a Trusted Business. The Call Manager will provide the Member with appropriate names, including that of the Volunteer, and shall enter a Service Request in the database.

## APPENDIX C: INDEPENDENT CONTRACT BETWEEN MEMBER AND VOLUNTEER

As of (date) \_\_\_\_\_, I will be performing services to that are beyond the scope of South Whidbey at Home's mandate or are in addition to those indicated in the Service Request. During these times, I will be acting in an individual capacity and not as a South Whidbey at Home Volunteer. I agree to hold South Whidbey at Home, and the Member, harmless of any liability that may be incurred by my (in)actions, which I understand are outside the coverage provided by any insurance carried by South Whidbey at Home.

Signature of Volunteer \_\_\_\_\_

Printed Name of Volunteer \_\_\_\_\_

Date \_\_\_\_\_

Signature of Member \_\_\_\_\_

Printed Name of  
Member \_\_\_\_\_

Date \_\_\_\_\_