

SOUTH WHIDBEY AT HOME

Becoming and Being a Volunteer



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SOUTH WHIDBEY AT HOME: Staying active, connected, and in charge	7
<i>Mission Statement</i>	7
<i>Values and Operating Principles:</i>	7
THE ELDER PERSPECTIVE.....	9
<i>Words from an Elder (from Eileen Jackson, RN)</i>	9
<i>The Four States of Elderhood</i>	9
<i>Guidelines and Tips in Relating to Us Elders</i>	10
WHAT DO OUR VOLUNTEERS DO?	13
<i>Service Volunteers</i>	13
<i>Call Managers</i>	13
<i>Ambassadors</i>	14
<i>Planning and Support Volunteers</i>	14
<i>Program Volunteers</i>	14
WHAT DO WE EXPECT FROM OUR VOLUNTEERS?	15
<i>General Expectations</i>	15
<i>Privacy and Confidentiality</i>	15
<i>Volunteer-First Policy</i>	15
<i>Safety First</i>	16
<i>Representing Our Organization</i>	16
BECOMING A VOLUNTEER.....	17
<i>Background Checks</i>	17
<i>Code of Ethics Agreement</i>	17
<i>Training</i>	17
<i>Placement</i>	18
<i>ID Badges</i>	18
<i>Insurance</i>	18
<i>Resignation</i>	18
<i>Termination</i>	18
BEING A VOLUNTEER	19

<i>How Do I Get an Assignment?</i>	19
<i>Schedule Preferences (Vacations, General Availability)</i>	19
<i>What Do I Do When I Accept an Assignment?</i>	19
<i>More Than You Expected?</i>	19
VOLUNTEER ORIENTATION	21
<i>History of the Village Movement</i>	21
<i>Structure of South Whidbey at Home</i>	21
<i>Roles of Volunteers</i>	21
<i>Process</i>	22
<i>Building Community among Volunteers</i>	22
LEARNING TO BE A SERVICE VOLUNTEER	23
<i>Code of Ethics</i>	23
<i>Confidentiality</i>	23
<i>Communication</i>	23
<i>Cannot Do 's</i>	24
<i>Personal Care</i>	24
<i>Meal Preparation</i>	24
<i>Household Tasks</i>	24
<i>Grocery Shopping</i>	25
<i>Home Organization and Downsizing</i>	25
<i>Pet Care</i>	26
<i>Furniture Moving</i>	26
<i>Transportation</i>	26
<i>Setting Limits on Time</i>	27
<i>Boundaries</i>	27
<i>Records of Volunteer Service</i>	28
<i>Providing Feedback</i>	28
<i>Reporting Observations and Concerns</i>	29
THE VALUE OF VOLUNTEERS	31
APPENDIX A: Volunteer Code of Ethics	35
APPENDIX B: Expense Report.....	37

APPENDIX C: Organizational Overview for Volunteers..... 39

SOUTH WHIDBEY AT HOME: STAYING ACTIVE, CONNECTED, AND IN CHARGE

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 a variety of professional services, Volunteer assistance, 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 focus on our primary mission—to support those aging in our community to live healthy and rich lives—and our secondary one—to build stronger intergenerational ties on South Whidbey.
- We believe the second half of life can be as rich and rewarding as the first half, and that older people have a need and desire to stay active and engaged.
- We are accountable, both individually and as an organization. We will say what we're going to do and do it. If we make a mistake, we'll admit it.
- We operate with integrity and impeccable ethics.
- We depend primarily on local donors. Their support is a measure of how the community values our work.
- We are fiscally responsible and combine an open heart with a tight fist.
- We are transparent in our actions, with open meetings and minute books.
- We are inclusive, accepting of our Members and Volunteers regardless of gender, sexual orientation, financial status, or spiritual choices. We embrace the variety of their preferences and needs.
- We appreciate the support of our donors and feel they are part of something wonderful.
- We express gratitude to our Volunteers by training them well, listening to their needs and suggestions, and thanking them often.
- We accept that every Member and Volunteer has the right to choose what's best for him/her at the time.

- We have fun—Members, Volunteers, donors, and the general public. There will be a light-hearted touch to our events and communications. We will offer many different ways for people to connect and contribute.
- 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 strive to create a community of care in which we take care of our own.
- We consider ourselves to be a part of a circle of giving and receiving and strive to provide various ways in which people can contribute.

THE ELDER PERSPECTIVE

WORDS FROM AN ELDER (FROM EILEEN JACKSON, RN)

When I was younger...I thought I knew what it was like to be old. My mother was old, I cared for the old as a nurse, and I studied the old. Here's what I know now that I am old: I had no idea then what it really felt like, to be old. None.

When I was younger...I taught the changes of aging using the Vaseline on the glasses, cotton in the ears, wobbly walking. But it turns out those aren't changes of aging, they are changes in ability.

When I was younger...I thought anyone 65, 75, 85, was old, retired, sitting on the porch watching the world go by. But then I saw that the span between birth and 30 was the same as between 60 and 90. That's a long time to live, and there's a lot of living still to be done.

When I was younger...I was afraid of getting old, of feeling old, of being old. Now that I am old, I don't feel old at all. I just feel the same me. I'm slower now, quieter now, but deep inside, I haven't changed at all.

So, now that I am old, here is what I ask you to consider as you care for those of us of advanced age: No two of us are alike. We all relate to being an elder in our own unique way. We feel more like ourselves than anybody else. We don't necessarily relate to being old.

THE FOUR STATES OF ELDERHOOD

In my experience there are four states of being in elderhood. These are states, not stages. They may be sequential, or we may visit different stages from time to time.

- **State One.** We are well and active and engaged, possibly still working full or part-time, either doing what we love or doing what we need to do financially. Our physical maladies are few and don't interfere much with our daily lives. We can probably clean, garden, and even climb a ladder (although it isn't a good idea.) Falls happen but not very often.
- **State Two.** We begin to experience some health challenges, pains, aches, mobility issues, and possibly poorer memory. We're still active and engaged, but we have more medical expenses, more doctor visits. We may actually be busier, but are starting to need assistance sometimes. We recognize that our life is changing--we are no longer in denial.

- **State Three.** We are challenged by our health. Perhaps we are diagnosed with a chronic illness, or a heart condition. We find our lives have become unmanageable. Doctor visits, figuring out how to live in a new way to accommodate our new conditions, buying and paying for medications have become overwhelming and time consuming. We need help with the things we used to do but can no longer fit in. We aren't cooking or eating as well as we were, our energy has faded. We are concerned or downright fearful about the future.
- **State Four.** We are frail and fragile, perhaps still up and going, or more homebound. We have adapted to our illness and live by a routine. We are clear that old age has set in but deep inside, we still feel our same old selves. Many of us live long lives in this state of frailty. We still want to be active and engaged though.

GUIDELINES AND TIPS IN RELATING TO US ELDERS

- Observe your own preconceptions and biases about older people. Don't judge yourself, just be open to the awareness that you have these biases; they will influence your interactions if you don't acknowledge them. Self-awareness is the key.
- Use all of the social graces you normally use to put a stranger at ease. Older people are just people, and are especially responsive to politeness and good manners.
- Be curious about your new acquaintance, as you would any new friend. Many older people have had fascinating life experiences you won't know about if you don't ask questions.
- Be careful about assumptions. Elders are as unique as the rest of us. For instance:
 - Don't assume that I'm unhappy being old, or that it's a bad thing. It's my life. Sometimes I celebrate it, and sometimes I grieve for my losses.
 - Don't assume that I am as upset about my condition as you are. Just because you think the house smells, don't think I care. Sorry, that's just how it is.
 - Don't assume that just because you're here to help that I'm happy about it. While I'm grateful, I may be embarrassed that I need help in the first place. I may even be angry or resentful. Don't take it personally.

- Don't assume that because I don't have a job, family, or kids that I'm not extremely busy, sometimes to the point of being overwhelmed. I may be a busy volunteer, but I have less energy, move more slowly, think more carefully, and have more to do in terms of figuring things out, managing my life, particularly if I am ill or disabled. It can be a full time job being older!
- Don't assume that because I'm older that I am unstable on my feet or unfit, can't see/hear, or I can't walk on my own. Don't hover. Just know that I might be a little shaky, I might need a hand under my elbow to steady me. I might even ask for help.
- You may find it helpful to adjust your manner of speaking. For instance, many elders are hard of hearing. The higher register of your voice is hardest to hear. To be heard, drop the pitch of your voice, don't raise the volume. (Think Marlena Dietrich.) If you are a fast talker, it may be helpful to slow your pace.
- Most of us, I'm afraid, remember faces but not names—so remind us of yours. Some of us need things written down as a memory prod. We may have our own system in place. Or not. Keep it simple when explaining things to us, making sure we understand as you go along. But not so simple that you make us feel you think we're stupid.
- Don't be patronizing. Call us by our names. Feel free to ask whether I'd prefer to be called by my first or last name. Don't call me "young lady," "honey," etc., unless I'm related to you. Some of us are cute, it's true, but that's not necessarily how we feel. We may feel like lions not kittens. Don't talk to me like I'm a child.
- An older person may be reluctant to disclose that he needs more help, is depressed, cannot manage financially, isn't eating, or is being abused. Open-ended questions like, "Are there other ways we could be of help?" or "Are there times when it all feels too much for you?" may help.

WHAT DO OUR VOLUNTEERS DO?

Most Volunteers assist Members one to three hours once or twice a month. There is a simple online sign-up sheet that allows you to select which services best fit your schedule and interests (or you can be emailed or called by the Call Managers). The online signup process lets you plan your schedule well in advance. There are opportunities to become more active, particularly as a Call Manager or program Volunteer.

SERVICE VOLUNTEERS

Service Volunteers provide direct assistance to Members. Here are some of the possibilities:

- Drive Members to medical appointments, shopping, the library and errands
- Run errands such as picking up a prescription or light shopping
- Friendly visits to read or chat with a Member or provide a brief respite for a Member who is a primary caregiver
- Telephone friends and check-in calls
- Light home maintenance (light bulbs, fire alarm battery changes, tasks requiring a ladder, minor repairs, etc.)
- Home organizing, downsizing
- Computer: printer, cell phone and other gadget assistance
- Temporary pet care
- Gardening advice and help
- Assistance with paperwork
- Reading mail for Members with vision problems

CALL MANAGERS

Our 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.

AMBASSADORS

Ambassadors welcome full Members with an in-home visit to explain our services and limitations. They fill out the full Member information form and discuss what kinds of help Members foresee needing and how often. They explain our services and suggest other helpful community programs.

A background in nursing, social work, eldercare, or caregiving is helpful.

PLANNING AND SUPPORT VOLUNTEERS

- Event planning
- Trusted business vetting
- Fundraising

PROGRAM VOLUNTEERS

- Volunteer recruitment
- New Member orientation
- Volunteer training
- Marketing and media

WHAT DO WE EXPECT FROM OUR VOLUNTEERS?

GENERAL EXPECTATIONS

Volunteers are expected to behave with courtesy, respect, and common sense. Specifically, we ask that you:

- Attend orientation and training sessions
- Adhere to the South Whidbey at Home Code of Ethics
- Call the Member the night before the service to confirm
- Be prompt and reliable
- Notify the office as soon as possible when unable to meet a commitment
- Treat Members and other Volunteers with respect
- Inform the office staff if a Member asks and you agree to do an additional service
- Protect confidential information
- Exercise good judgment
- Decline tips or any gifts of significant monetary value that may be offered

PRIVACY AND CONFIDENTIALITY

Volunteers are responsible for maintaining the confidentiality of all information to which they are exposed while serving as a Volunteer, whether this information involves a Member or another Volunteer. Never refer to or discuss a Member's identity, personal information, services they request or receive, and any information you may acquire through your time as a Volunteer with anyone other than the Call Manager or a Board Member. Such information should not be shared outside the organization.

VOLUNTEER-FIRST POLICY

South Whidbey at Home supports a Volunteer-first policy when providing Members with services. Most Member services are provided by Volunteers. We will determine whether a requested service can be handled by a Volunteer or whether it requires the expertise of a professional service provider.

SAFETY FIRST

The Call Manager will usually screen the tasks to which you are assigned. You won't, for example, be asked to move large pieces of furniture down two flights of stairs. Sometimes potentially dangerous circumstances can only be spotted after you arrive at the Member's home. Do only what you feel safe in doing. If a Member is not putting safety first, let us know. Trust your judgment.

REPRESENTING OUR ORGANIZATION

Volunteers should not act on behalf of or make statements representing the official position of the organization, unless they have been authorized to do so by an officer of the Corporation or a Member of the Board. For example, Volunteers should not make statements to the press or broadcast media without prior authorization. No Volunteer is authorized to sign any agreement involving contractual or financial obligations.

BECOMING A VOLUNTEER

BACKGROUND CHECKS

Background checks will be run on all Volunteers. Volunteer drivers will also be subject to a DMV check and be required to furnish insurance information.

CODE OF ETHICS AGREEMENT

Volunteers will be asked to agree to and sign our Code of Ethics Agreement (see **Appendix A**) before accepting their first assignment. Volunteers are expected to promote the Mission of the organization and at all times to act in accordance with our Statement of Values and Operating Principles.

TRAINING

The goal of South Whidbey at Home Volunteer training is to ensure that all Volunteers have the tools they need to be proficient and comfortable with the assignments they accept. Trainings include hands-on sessions, videos, and printed instructional materials. Volunteer peer groups meet periodically to share experiences and ideas. And, always, the Call Managers are available to answer your questions—or find the right person who can.

Training topics include:

- An overview of South Whidbey at Home
- Confidentiality and privacy concerns
- Typical Volunteer tasks
- The importance of boundaries in working with our Members
- The challenges of aging, including hearing loss, physical limitations, memory issues
- Use of our web based software for accepting assignments and providing information about the Volunteer's changes in availability

Additional training for Volunteers working in specialized roles will be offered on an as-needed basis.

PLACEMENT

Volunteers will be asked to fulfill Member services and assignments that match their particular interests and abilities. Volunteers are free to discuss a change in assignment at any time.

ID BADGES

Each Volunteer will receive a photo ID badge and are expected to wear it when at a Member's home or providing service to a Member.

INSURANCE

South Whidbey at Home has insurance which may cover injuries incurred by or caused by a Volunteer while acting on behalf of the organization. Details about the coverage are available on request.

RESIGNATION

We understand that Volunteer assignments are not permanent. A Volunteer may decide to stop Volunteering at any time. We ask that you give as much notice as possible if you decide to resign or take a leave of absence from the program. To help the organization grow and learn from its experiences, Volunteers are asked to participate in an informal exit interview when leaving the program.

TERMINATION

South Whidbey at Home may dismiss a Volunteer for failing to fulfill the duties of their position and/or 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.

BEING A VOLUNTEER

HOW DO I GET AN ASSIGNMENT?

There are two ways to receive an assignment:

- An email
- A phone call from a Call Manager.

SCHEDULE PREFERENCES (VACATIONS, GENERAL AVAILABILITY)

In order to contact you about services only when you are likely to be available, we can keep track of your weekly availability, vacations, and preferred contact method. If you tell us when you will be on vacation or otherwise not available we will not call you at those times. Please let us know when you will be away.

Call managers will send an email or call Volunteers who are likely to be available if the time of the request is near.

WHAT DO I DO WHEN I ACCEPT AN ASSIGNMENT?

After you sign up for a service, you will receive an email or phone call giving you all the information about the request. Two days before the date of the service you will receive a second confirmation email or phone call.

The night before the service, you should call the Member to remind them about the service, unless the detailed instructions explicitly ask you not to.

While driving in a car or performing another service, you will often talk to the Member and learn about them. Please respect the privacy of our Members.

Normally, there is no reason to call the office after completing a service. If there is something that the office should know about how the service went or about the Member that subsequent Volunteers should know, please phone or email a Call Manager.

MORE THAN YOU EXPECTED?

Sometimes issues arise when a Member assumes that our services are unlimited. It is helpful to understand what we do and don't do.

We do not do chores on an ongoing basis. We do not mow lawns or wash windows. We do not paint rooms, although we have several Volunteers who might help a Member assess proposals from contractors. We do not do major projects.

We change hard-to-reach light bulbs, take the old grill to the landfill, put in or take out an air conditioner, help move a piece of furniture, etc. We do not take the Member for an afternoon of shopping entertainment if they have only asked to go to the supermarket. On the other hand, if a Member requests spending time at the Farmers' Market or thrift stores, and a Volunteer wishes to do it—that is fine. We help a Member with TV remotes, printers, phones, Kindles, iPads and computers. We do not reconfigure hard drives. Everything we do is with the knowledge and discretion of the particular Volunteer.

In the final analysis, it is up to the Volunteer to decide what services you feel comfortable doing.

VOLUNTEER ORIENTATION

HISTORY OF THE VILLAGE MOVEMENT

- Started in Beacon Hill Neighborhood of Boston in 2002
- Based on neighbors helping neighbors so all can remain in community, and active as long as possible
- Presently there are almost 200 villages in operation around the country with another 150+ in some stage of development
- Many villages are members of the National Village to Village Network, which provides assistance, training, and a communication forum for member villages
- South Whidbey at Home grew out of a community meeting in early spring, 2015

STRUCTURE OF SOUTH WHIDBEY AT HOME

- See **Appendix C** of your handbook for a discussion of our organizational structure, leadership, and committees
- Everyone is a Volunteer--we have no paid staff
- Board of Directors sets policy, provides financial and operational oversight, recruits Members, Volunteers, and businesses, interfaces with committees
- Committees are comprised of at least one board member and other Volunteers-develop and implement programs, and organizational operations

ROLES OF VOLUNTEERS

- **Board Members**
- **Committee members**
- **Ambassadors:** Welcome new members through personal interviews, provide information, assess needs and desires of Members, answer questions.
- **Call Managers:** The communications hub and center of the organization. They field calls from Members requesting services, maintain the database, identify and schedule Volunteers, follow up after service with both Volunteer and Member to ensure satisfaction. The “voice” of the organization.
- **Volunteer Service Providers:** Perform various tasks for Members and/or organization. The “face” of South Whidbey at Home

PROCESS

- Volunteer Application completed
- Applicant interviewed by committee member to verify information on application, confirm services applicant wishes to provide and availability, answer any preliminary questions
- Verified Volunteers performs background check on applicant, based on information applicant provides VV (not South Whidbey at Home). Drivers have DMV check done as well
- Training sessions for Volunteers
 - Each Volunteer given handbook for reference
 - General orientation for all Volunteers
 - Ambassadors, Call Managers, and Drivers get specialized training for each role
- Getting services
 - Member contacts Call Manager to request service
 - After verifying caller is full Member, Call Manager searches database to determine which Volunteers are available at desired time and have indicated willingness to perform desired service
 - If request outside scope of South Whidbey at Home's functions or abilities, Call Manager will give member list of other resources
 - Call Manager contacts Volunteers to verify ability and availability to fulfill Member request
 - Once Volunteer confirmed, Call Manager lets Member know who is going to perform service and when
 - Volunteer contacts Member for any additional information needed
 - Services performed by Volunteer
 - Volunteer informs Call Manager that Member's request completed, gives information on time involved, expenses incurred (if any,) and any other information deemed appropriate
 - Call Manager follows up with both Member and Volunteer, inputting any necessary information into Club Express database

BUILDING COMMUNITY AMONG VOLUNTEERS

- Periodic brown bag lunches for Volunteers providing time to share best practices, solve problems, swap stories
- In-service trainings on specialized topics of interest
- Social gatherings

LEARNING TO BE A SERVICE VOLUNTEER

CODE OF ETHICS

Please see Appendix A: South Whidbey at Home Volunteer Code of Ethics. All Volunteers must sign this agreement at the end of training.

CONFIDENTIALITY

Members may share intimate details about themselves. They must know that they can trust Volunteers to keep conversations confidential. Volunteers must never discuss a Member's identity, personal situation, services needed with anyone other than a Call Manager or a Board Member.

COMMUNICATION

In general, there is a need for respectful language Volunteers can use to extricate themselves from requests for services that are beyond the boundaries of our mission, are unsafe, or extend the specific commitment of a particular, scheduled, interaction.

- When in doubt about anything, ask a Call Manager
- If uncomfortable with any situation, contact Call Manager
- Right to say "no" to assignment not comfortable performing
- Willing to accept guidance of staff or Call Manager
- Call Managers will check in on new Volunteer-Member relationship
- Notify Call Manager if your availability changes or you need to end assignment
- Notify Call Manager if you observe changes in Member, "red flags," unusual situation, or if unsure about sharing personal information
- Notify Call Manager of any "incident/accident" involving Member or while Volunteering
- Inform Call Manager of any situations of harassment or abuse
- Participate in feedback opportunities on your Volunteer experience

If a Member falls or needs medical care, call 911 and then notify Call Manager

If a Member falls while you are there, 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 have weak bones.

CANNOT DO 'S

Understanding what Volunteers cannot do is just as important as understanding all the things Volunteers can do. We do tasks that have been assigned by the Call Manager based on a request and prior discussion with the Member.

We will talk about personal boundaries using examples. We are neighbors helping neighbors, but we are also part of an organization that has guidelines for the protection of both Volunteers and Members. We are Volunteers, not professionals. We do not want to inadvertently cause harm. For example, Volunteers should not be expected to take a side in a domestic dispute. Volunteers are not expected to provide a service that should be done by a physician, a skilled nurse, CNA, LPN or paid care provider.

The Member must be mobile enough to stand up alone. You can lend support with your arm as they get in and out of a car, but we are not medical or personal care providers and are not trained in the special mechanics of moving elders.

PERSONAL CARE

Personal care includes personal grooming, dressing, toileting, bathing, clipping nails, dressing wounds, giving medications. You could help with a coat or sweater. Use good judgment.

MEAL PREPARATION

South Whidbey at Home Volunteers can pick up and deliver groceries for Members. Volunteers do not cook meals; however, they can provide prepared foods such as serving take out or heating frozen entrees.

Call managers can provide information on available resources for meal service.

HOUSEHOLD TASKS

We do not paint rooms, wash windows, or clean bathrooms. There are referral services we may be able to help find for these types of projects.

Occasionally, a Volunteer might offer to change a light bulb and then the Member asks for help to install additional light switches. It is ok to decline to provide services that do not coincide with a Volunteer's skills or available time.

GROCERY SHOPPING

If you take a Member grocery shopping, you may help them put their groceries away if they ask, but you would not be expected to cook a meal.

HOME ORGANIZATION AND DOWNSIZING

Volunteers are cautioned to be very careful about discarding a Member's possessions. The concern is that the Member may change his or her mind or become upset that something has been tossed or donated. Volunteers are encouraged to simply sort items and consider the wisdom of involving a family Member (if possible) in the decision to discard. Sometimes a Member will specifically request that items be discarded. In this case, a written note signed by the Member is suggested.

***“Sue Volunteer is removing items I have discarded at my request. The decision about which items to discard was solely mine.”
(Signature of Member or responsible party)***

When performing a task such as making a pile of clothes or household goods to take to Good Cheer or throw away, do not make decisions for the Member. Instead offer options, make recommendations. Be conscious that people sometimes change their minds, or forget from day to day. Leave the goods for a family Member or friend to throw or give away. If you do choose to take something to Good Cheer or the dump, for example, write a simple list, date it, and ask Member to sign.

Helping with bills could be an assignment. Do not rearrange the Member's desk or piles of papers, or positions of items. Don't move furniture that changes the flow of their habitual path or orientation unless this is the assignment discussed in advance with the Call Manager. One person's seeming disorder could actually be their order. Don't mess up their order.

Volunteers are not expected to help with legal documents that are considered confidential.

PET CARE

If an animal requires care in an emergency, we can walk or feed them, but we do not take them to a veterinarian, where we would incur costs for the Member, or give medications. We provide temporary care in case of emergency.

Short term pet care while a Member is in hospital or unexpectedly away from home is within the scope of South Whidbey at Home services. It is expected that Members arrange for professional pet care for prolonged or planned absences.

Volunteers can provide temporary pet services such as feeding, walking, transport to a kennel, accident cleanups, litter box maintenance, etc. Volunteers cannot clip nails or provide medications. It is up to the Volunteer to determine if it is safe to work with an individual pet and our ability to provide the necessary services. Exotic animals, livestock, snakes, rodents, insects, etc. are outside the scope of our services. Care is limited to dogs, cats, birds, and fish.

Consult the Member's emergency helper as soon as possible to make arrangements for continuing pet care lasting more than one week.

FURNITURE MOVING

Small pieces of furniture that can be moved safely by one Volunteer should not be a problem. If something bigger needs to be moved, suggest that the Member contact the Call Manager to schedule several Volunteers to come and handle the task.

TRANSPORTATION

Volunteers who have been approved as drivers can provide short term transportation for Members. While primarily offered within South Whidbey, transportation can be provided as far north as the Deception Pass Bridge, if the Volunteer so desires. Transportation is not provided off Whidbey Island. Members must be able to get into and out of the car on their own. Volunteers are not allowed to drive Members' vehicles without prior approval from the Call Manager. South Whidbey at Home does may not provide multiple rides to a Member within a short period of time, or regular transportation.

If a Volunteer offers to take a Member to a social event and the Member asks if the Volunteer will always invite the Member to social events, this is beyond the expectations we place on Volunteers.

Physical Assistance: 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

SETTING LIMITS ON TIME

Generally, the amount of time spent with a Member is determined on a case by case basis depending on the service required and the resources of South Whidbey at Home Volunteers. An average of three hours twice a month is typical. When a Member asks for more services than can be accommodated during the scheduled visit, the Volunteer needs a gentle way to conclude the visit and help the Member identify alternatives.

Volunteers are given specific assignments by the Call Manager. If the Member wants to tack on further assignments, use your discretion regarding your time and the appropriateness of the request. Volunteers can always suggest that the Member call the office to arrange further assistance.

Drivers scheduled for a specific errand may be asked to stop here and there along the way. Whether or not these requests can be accommodated is left up to the discretion and judgment of the Volunteer. The Volunteer may need a respectful way to set limits on the excursion

BOUNDARIES

Volunteers often come into personal contact with Members as they provide transportation, help with minor home repairs, work in yards, and offer technical expertise. Volunteers should not be asked to perform services that require personal care, and such requests should be reported to a Call Manager. Staff will then work with the Member to discuss alternate support options. *Volunteers should not offer advice about a Member's health or safety.*

While we encourage friendships to develop among Members and Volunteers, service requests should come through the Call Managers. Volunteers should

not feel obligated to fulfill every service request, even if the requesting Member has become a friend. Volunteers should notify a Volunteer coordinator if they feel a boundary has been crossed, and staff will work with the parties involved to resolve the situation. *A Member may not ask a Volunteer directly for a service instead of requesting help through the office. If this occurs please notify a Call Manager.*

Safety of both the Volunteer and the Member is of primary concern. If the Volunteer is faced with a situation or circumstances in which he or she does not feel safe or believes the Member may be unsafe, immediately contact the Call Manager. Do not feel obliged to place yourself in an uncomfortable or unsafe situation.

Volunteers do not accept tips or payment from Members for services provided.

RECORDS OF VOLUNTEER SERVICE

Accurate records of service are important to both our organization and our Volunteers. Records of Volunteer service are used for program development, Volunteer recognition, insurance coverage, budgets, and seeking foundation or grant support. Volunteer time is tracked monthly and may be used, if verified, as proof for tax deductions for gas and mileage to and from an assignment (provided to Volunteers upon request). Volunteers will report time spent on assignments to the Call Managers after completion of the assignment.

PROVIDING FEEDBACK

We need feedback on the service visits a Volunteer makes to ensure safety and quality. Don't hesitate to call or send an email, especially if:

- You have ideas on how we can better serve our Members or Volunteers
- Something was outside of the request you are filling

Each month a Call Manager phones all Members and Volunteers who have had service requests to see how things went. We want to make sure the visit has been a useful, comfortable and rewarding experience for both Members and Volunteers.

REPORTING OBSERVATIONS AND CONCERNS

Volunteers must report observations or concerns that might prevent them from doing their job or a concern that a Member requires more care than South Whidbey at Home can provide. Examples:

- Member might be hostile or threatening
- Physical environment or presence of hostile animals interfere with ability of Volunteer to complete assignment
- Member hoarding to the point that there is a safety issue
- Family Member might be interfering with Volunteer efforts
- Volunteer does not have needed equipment for task at hand
- Member might be confused, frightened or in pain
- Member might be in danger or unsafe

We have Volunteers who can assess the situation, coordinate with professionals from area agencies, and make a recommendation going forward. You are our eyes and ears on the ground and we will take your observations seriously.

As South Whidbey at Home grows, we will share our experiences at brown bag lunches and learn how best to serve our Members and support our Volunteers. Always feel free to discuss any concerns you have with the Call Manager.

THE VALUE OF VOLUNTEERS

Volunteers are the heart and soul of South Whidbey at Home. It's thanks to your efforts and energies that we are able to provide vital services to the community. In everything we do as Volunteers, we represent South Whidbey at Home to the greater community and to our members.

As neighbors helping neighbors, the way we treat each other determines the quality of our experience. If we are warmly welcomed to a group event, we feel accepted as part of the community and look forward to getting together again. The way our Volunteers treat our members—and vice versa—determines how we feel about South Whidbey at Home. If the call manager is respectful of a Volunteer's time and commitment, the Volunteer will continue to enjoy participating and will continue to feel fulfilled. And if the call managers feel valued and respected, they can maintain their own enthusiasm for the work. So, we see that the energy we bring to our tasks, and the respect we show to each other, reflect directly back on South Whidbey at Home.

THANK YOU!

We deeply appreciate your willingness to Volunteer your time and energy to assist our Members help make South Whidbey at Home a valued and valuable addition to our community.

We know we could not exist without your help.

Thank you.

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 are expected to respect the privacy of Members and to exercise discretion when interacting with them. Accordingly, Volunteers will maintain confidentiality regarding Members at all times. For example, when telling anecdotes about interactions with Members and/or their families, Volunteers agree not to share any information that would identify a Member.
- Volunteers will treat Members, their family members, Renters, Residents and Guests, with respect and courtesy.
- The use of obscenities, derogatory comments based on race, color, religion, disability, sexual orientation, gender, national origin, or ancestry, and/or verbal or physical threats or attacks will not be tolerated. Action by any Volunteer that may be dangerous or create a health or safety concern, hostile environment, turmoil, disruption or disturbance among Members or other Volunteers is not permitted.
- 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 further services to Members, except in accordance with the policies and procedures of the organization and pursuant to a specific contractual arrangement with the Member in which both

parties acknowledge such advice and services are independent of the organization and outside the scope of its membership benefits. (not sure what this is about or what form it would take)

- Volunteers will not promote services and will not accept gifts or loans from Members. Volunteers agree to provide services without monetary or in-kind compensation.
- South Whidbey at Home respects the cultural, religious and political views of its Members. Volunteers agree to refrain from trying to impose their own views on Members.
- Volunteers must call the office immediately if they have concerns regarding safety of a Member, or themselves.

Volunteer name: _____

Signature: _____ Date: _____

APPENDIX B: EXPENSE REPORT

Please fill out (in print) this form when you carry out requests that involve receiving funds from a Member to purchase groceries or other items. Both the Volunteer and the Member must sign this form.

Date:	
Amount Received:	\$.
Total Cost of Items Purchased:	\$.
Change Given to Member:	\$.
Member's Signature:	
Volunteer's Signature:	
Notes:	



Volunteer Program
South Whidbey at Home
P.O. Box 557
Langley, WA 98260

Phone (360) 331-1971
www.swathome.org

APPENDIX C: ORGANIZATIONAL OVERVIEW FOR VOLUNTEERS

Overview: South Whidbey at Home is a Washington State non-profit corporation with federal non-profit status under Sec. 501(c)(3) of the Internal Revenue Code. A Board of Directors and function-based committees provide oversight and management. While the Board ultimately makes decisions, its Members rely on the work of and recommendations made by the various committees. All committee and board Members are Volunteers.

Board of Directors: South Whidbey at Home is managed by a Board of Directors, which presently has six Members. Board officers include a president, vice-president, secretary, and treasurer, as well as two at-large Members. All are Volunteers. Their primary function is financial and programmatic oversight. Members of the initial Board of Directors self-selected from the earlier Steering Committee formed to develop the organization. Terms are staggered with one-third expiring each year.

MEMBERS:	Lynn Willeford	<i>President</i>
	Allan Ament	<i>Vice-President</i>
	Miriam Raabe	<i>Secretary</i>
	Paul Goldfinger	<i>Treasurer</i>
	Sharon Emerson	
	Marcia Wiley	

Committees: Committees perform the bulk of the organization's work and development. There are presently eight standing committees: Volunteer and Membership Services, Finance, Programs, Fundraising, Technology, Media and Marketing, Governance, and Business Development. In addition to its members, each committee has a board member as either the lead or as liaison, assuring open and effective communication in both directions.

Governance (Allan Ament, lead): It has responsibility for writing the policies and procedures desired and needed by the corporation, and dealing with corporate paperwork.

Media and Marketing (Lynn Willeford, lead): This committee is focused on increasing community awareness of South Whidbey at Home. Members create content for the organization's website, social media, newsletter, and printed materials, and provide speakers for public and organizational presentations. The committee is also responsible for establishing and maintaining collaborative relationships with other organizations.

Business Development (Marcia Wiley, *lead*): **Committee** members solicit local businesses to be included in the organization's list of trusted businesses, which provide goods and services to Members, often providing discounts or other perks. To be included in the list, businesses fill out an application, providing references and legal information. All businesses are vetted by committee members before being accepted for inclusion on the list.

Technology (Sharon Emerson, *lead*): Training Members and Volunteers on the use of the Club Express software is the responsibility of this committee. The committee also researches and recommends other appropriate technology.

Finance (Paul Goldfinger, *lead*): The primary function of this committee is to develop and supervise the organization's yearly budget, supervise tax preparation, and oversee required audits.

Fundraising (Helen Taylor, *consultant*): Villages often need grants and donations to meet their budgets. This committee is in charge of developing and supervising any necessary fundraising activities.

Volunteer and Membership Services (Eileen Jackson, *lead*; Allan Ament, *liaison*): The committee is in charge of vetting and training all Volunteers, and creating policies and procedures for them. They are responsible for creating satisfied members and Volunteers.

Programs (Lynn Willeford, *liaison*): The social and educational programs offered to Members and the public are developed and put on by Members of this committee.