

2019

# Viva Village Volunteer Handbook



Serving Beaverton & Beyond

503-746-5082

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## Viva Village Vision

A community where older adults remain safely and confidently in their own homes as they age.



## Viva Village Mission

To build and sustain a strong community of members and volunteers that helps Beaverton-area older adults stay in their homes safely, affordably, and comfortably as long as they choose.

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**503-629—0111**

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Office hours:  
Monday – Thursday  
10 am–4 pm  
Friday  
10 am–1 pm

Thank you to the Viva Village Volunteer Team and the many other individuals whose efforts and collaboration resulted in this Volunteer Handbook.

**Viva Village is a member of the Villages NW nonprofit Hub & Spoke Network.**

## Villages NW–Metro

Email: [info@villagesnw.org](mailto:info@villagesnw.org)

Website: [villagesnw.org](http://villagesnw.org)



*"Because it takes a Village  
to age-in-place."*

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## **Welcome to Viva Village**

Welcome and thank you for being part of Viva Village as a volunteer. Volunteers are the cornerstone of the Village, and we are delighted to have you join us. We are the reason Viva Village is able to provide Beaverton-area older adults the option of remaining in their homes and maintaining vital connections to friends, neighbors, and the community.

This handbook is your resource for the Viva Village volunteer experience—a brief introduction to Viva Village and our volunteer opportunities, procedures, expectations, and resources. We hope your time as a volunteer will be engaging, rewarding, and as important to you as it is to Viva Village.

*–The Viva Village Volunteer Team and Governing Council*

## Viva Village Equals Volunteers

As volunteers, we *are* Viva Village—supporting and sustaining the network of neighbors helping neighbors to create a safe, caring community that supports older Beaverton-area adults to remain in their homes.

Volunteers are the key to the success of Viva Village. We provide the services, resources, and community activities that allow our Village to offer a safety net and the peace of mind that make a positive difference in the lives of our members.

Volunteers support members in their quest to stay healthy and socially active.

Volunteering provides a great opportunity to

- connect with others and be a valuable part of our community.
- hear wonderful stories from Village members.
- put talents, skills, and experience to good use.
- be physically, mentally, and socially active.
- help support and sustain a Village that benefits others and someday can benefit you.

## Viva Village

### ***About Our Village***

The Village Movement began in Boston, the result of neighbors who saw a need and developed a plan that led to the creation of Beacon Hill Village. Their Village began offering services to its members in 2001 and is still going strong. The Village Movement has now spread across the country with more than 200 Villages providing services to more than 25,000 members.

Closer to home, the Village Movement in the Portland area began in 2011 with a small group of SE Portland residents. Since that time, the idea has gained momentum and attracted volunteers with the drive and expertise to create the infrastructure to develop and support Villages NW (the Portland area “hub”) and an increasing number of “spoke” Villages, of which Viva Village is one. As part of this network, Viva Village enjoys the nonprofit status held by Villages NW as well as benefits from the coaching, advice, and organizational and administrative support it provides.

Viva Village is made up of Members who pay annual dues and Volunteers who provide the services, resources, and referrals members need to live independently and safely in their own homes. Full membership in Viva Village is available to adults 18 and over who need the support and services Viva Village provides to remain in their homes. Viva Village includes the city of Beaverton and parts of unincorporated Washington County.

Viva Village

- offers a single point of contact for members to schedule volunteer services and to get information about existing community resources;
- links members to background-checked volunteers who will perform a variety of tasks such as transportation, computer help, shopping, and light home and garden care;
- provides names of screened vendors who will offer professional services, often at a discount;
- builds relationships and develops community through social and educational activities;
- maintains strategic partnerships with existing community agencies.

**Viva Village Values**

*(see Appendix A)*

Viva Village has established values that provide the foundation for all members and volunteers as we work with one another and the community at large.

- |                      |                     |                          |
|----------------------|---------------------|--------------------------|
| <b>Inclusion</b>     | <b>Transparency</b> | <b>Collaboration</b>     |
| <b>Volunteerism</b>  | <b>Privacy</b>      | <b>Lasting Community</b> |
| <b>Communication</b> |                     |                          |

**Volunteer—Things to Know**

Things go most smoothly when we all know what is expected—and what to expect.

From the beginning, Viva Village volunteers have worked together to establish protocols based on experience and research. Our teams have found that the best outcomes come from collaboration. If you have an idea you think would be an improvement, bring it to the appropriate team for consideration.

**Safety First**

Member requests are screened before being assigned to volunteers. However, at times a potentially dangerous situation can be identified only after you arrive at a member’s home. Do only what you feel safe doing. Let the office know if a situation does not feel safe. Above all, trust your judgment.

## ***Maintaining Personal Boundaries***

Volunteers are friendly and compassionate, and we care about each member's well-being. However, we are volunteers, not best friends or family members. It is important to maintain enough distance to be objective and realistic. Volunteer mental health is important, too!

Talk to a staff member if you notice

- you are losing objectivity
- you feel overly responsible for the member, or
- you are taking on the role of counselor rather than volunteer.

## ***Insurance Coverage***

Insurance coverage is an important issue for all volunteers. Two levels of insurance provide protection for volunteers in their work.

- 1) The volunteer's own medical and, if driving, auto insurance is the first level of coverage.
- 2) Villages NW insurance provides coverage while volunteers are acting as agents for Viva Village. It includes
  - liabilities they might incur while performing Viva Village duties.
  - wrongful acts such as any breach of duty, error, misstatement, or misleading statement committed while performing official duties on behalf of Viva Village.

A certified volunteer driver is required to provide proof of automobile insurance coverage. The volunteer's personal automobile insurance provides first coverage for any accident. Villages NW insurance is secondary. Volunteer drivers complete additional training and are given specific information regarding what to do if an accident occurs while driving.

## ***Privacy/Confidentiality***

*(see Appendix C)*

**As a Viva Village volunteer, you make a commitment to keep confidential all information learned about members, staff, other volunteers, and donors.** Please be respectful of the connection you may experience working closely with Village members. However, if there is a concern involving your or a member's health, well-being, or safety, please contact the volunteer coordinator.

Viva Village respects the privacy of its members, volunteers, and donors. Viva Village and Villages NW are the sole organizations that have access to Village member and volunteer information.

## ***Communication with Viva Village Staff***

- Let the office know if you are unable to complete a service request.
- Notify the office of changes in your availability (vacation, short-term commitments, etc.).
- Report completed requests to the office (by email or phone).
- Contact the staff with questions, concerns, or comments. Viva Village can improve only with your feedback.

## ***Volunteer Support***

It takes all of us through mutual respect and appreciation to create a positive volunteer experience. We strengthen our Village when we are willing to discuss difficult issues. Viva Village maintains a support system through both formal and informal means.

- The volunteer coordinator is available if you have concerns about a service visit or other volunteer experience.
- Periodic volunteer gatherings provide a venue to discuss successes, common issues, and concerns.
- A Professional Advisory Committee at Villages NW is available to help with unexpected situations involving members and other volunteers. Contact the Viva Village office so the volunteer coordinator can initiate this process.

## ***Option to Opt Out of Providing Specific Services***

*(see Appendix C)*

As volunteers, our goal is to empower members to live independently with dignity and autonomy without judging their life-style choices or activities that are legal in the local community.

Viva Village also respects the volunteer's choices. You may decline a specific request if it is beyond your comfort level or if you have personal objections.

## ***Screened Vendors as Volunteers***

Some volunteers may also be listed as Viva Village screened vendors or own businesses that provide services relevant to the member's request.

A Village volunteer wears only one "hat" at a time. When you provide a service to a member you represent Viva Village, not your personal business.

If you determine the requested service is beyond the scope of a volunteer, refer the member to the office for referral to screened vendors.

# Volunteer Opportunities

## ***Service Volunteer***

### **Household Support**

- Light housekeeping and other tasks
- Paperwork management
- Technology help
- Light gardening/yard work
- Light home maintenance
- Occasional help with pet care
- Home safety review

### **Personal Support**

- Activity Buddy (walking, exercise, games, puzzles, conversation)
- Check-in phone calls
- Errands for the member
- \*Health care buddies. (Provide a second set of ears for a member at medical appointments, take notes, make sure questions are answered.)

### **\*Transportation:**

- Rides to appointments, shopping, events, airport, etc.
- Errands with the member

### **Office Staff**

- Coordinate service requests
- Office administration

### **Village Support**

- Resource development
- Outreach and publicity
- Member recruitment and retention
- Volunteer recruitment, training, and retention
- Website and database maintenance
- Events and program development
- Screened vendors and community resources
- Administration

\*Additional training is required for Health care buddies and for Transportation volunteers.

## **Providing Services**

### ***Service Request Protocol***

All member requests go through the Viva Village office. The following summarizes how member requests are matched with willing volunteers:

1. Members call or email the office with a request for services. They are encouraged to do this at least three to four days in advance.
2. The office volunteer gets all pertinent details and searches the database for volunteers who match what is being requested.
3. The office volunteer emails or phones several available volunteers with service request details.
4. The first volunteer to respond is selected.
5. The office confirms the match with both the volunteer and the member by email or by phone.

6. The volunteer calls the member to confirm. Take the service request details with you when you meet the member.
7. After completing the service appointment, the volunteer notifies the office that the service has been completed. Drivers submit a Driver Ride Report to the office.

This valuable information not only aids in tracking service requests that are still pending but also is used for planning and reporting requirements.

### ***Successful Visit Reminders***

When you visit a member, whether to assist in the home or to provide transportation, you are a representative of Viva Village. Keep in mind the following to ensure your visit goes smoothly, for both you and the member.

- Be on time.
- Explain who you are, why you are there, and your connection with Viva Village as a volunteer. Be sure to wear your Village name badge.
- Discuss with the member what he or she wants to accomplish.
- Respect the member's personal space; it's his or her home, not yours.
- Be patient and listen.
- Understand your role and boundaries as a volunteer.
- Always schedule recurring visits through the Village office, not directly with the member.
- You are not obligated to do any tasks not included in the initial member request.
- After your visit, let the office know. Drivers submit the Driver Ride Report. It is essential for Village success to report hours and the member's status.

### ***Good Listening Skills***

1. Listen with full attention, which respects both the speaker and the listener.
2. Listen completely before responding.
3. Be patient. Allow time for the speaker to express his/her thoughts.
4. Be accepting, non-judgmental.
5. Use eye contact (but don't stare).
6. Be empathetic.
7. Show interest and invite conversation with open-ended questions.

## ***Member Safety and Health***

Depending on the type and length of assignment you have, you may be the person who sees a particular Viva Village member most regularly. For this reason you may be the first to identify changes that might affect the member's safety. Even on your first visit, you may notice signs of potential concern.

If you observe any changes in cognition, memory (e.g., signs of forgetfulness), or physical abilities (e.g., dizziness, slurring of words), report this to the Viva Village office. We trust your intuition, and you can trust us to sensitively check on the well-being of the member without compromising your relationship.

For issues requiring an urgent response, call 911, then call the Viva Village office. For a situation that is not life threatening but where help is needed, use the Washington County non-emergency phone number—503-629-0111.

## ***Emergency Procedures***

If an emergency occurs when you are providing a service, you must remain calm. Focus on helping the member and notifying the proper authorities who can provide appropriate assistance.

### **If a member has an accident:**

- If the member is unconscious, DO NOT try to move him/her, except in a hazardous situation such as a fire.
- DO NOT take the member to a hospital. Call 911 immediately for emergency assistance.
- Call the Viva Village office for further assistance.

### **If a member does not answer the door:**

- Call the member again while you are outside the house. Knock on the door and walk around the house to look through windows. If there is obvious cause for concern (e.g., member lying on floor), call 911 immediately.
- You may check with a neighbor, but then call the office to report the non-response.
- The office can check if the member has an "Alert" in the database.
- The office then contacts the Member Coordinator, Volunteer Coordinator, or a Governing Council member. Often these people may be aware of a situation that may influence how we respond.
- The Coordinator then calls Emergency Contact(s) and involves them in the next steps.
- If an Emergency Contact is not available, the Member or Volunteer Coordinator assumes the responsibility for the next steps.

## ***Beyond the Volunteer Scope***

Some activities are beyond the scope of a Viva Village volunteer. This is determined by health and safety concerns as well as by practical and legal considerations.

These restricted activities include the following:

- Administering any type of medical care (other than CPR/Heimlich if necessary).
- Lifting a member who has fallen. Call 911 or the non-emergency number first, then the Village office.
- Dispensing, sharing, or recommending medications, supplements, etc.
- Providing personal care services such as bathing, dressing, or bed or chair transfers.
- Providing alcohol or recreational drugs.
- Driving a member's car.
- Offering medical, legal, or financial advice.
- Telling a member what to do or making decisions for the member.
- Getting involved in a member's family conflicts or taking sides.
- Accepting gifts or tips other than cookies, coffee, or tea. Never accept money. You are welcome to explain how members can donate to Viva Village.
- Sharing confidential information or gossip about members, staff, or other volunteers.
- Inviting a member to contact you directly for Village services. All member calls must go through the Village office to be screened and evaluated. Only these calls are under the Village insurance umbrella.
- Giving out your home address.
- Sharing your problems or asking for advice.
- Visiting if you are ill. Older people are often at greater risk of illness, and it is important that you safeguard their health in addition to your own.

## ***Certified Viva Village Volunteer***

After you have completed your volunteer training, your name will be entered in the database as an available volunteer to respond to member requests and/or participate in Village support activities. All requests go through the Viva Village office.

Make sure your contact information is current. Most communication is via email. Add [vivavillagecentral@gmail.com](mailto:vivavillagecentral@gmail.com) to your contacts or address book to prevent messages ending up in your spam folder.

Please let us know if you will be unavailable for a time or can no longer volunteer. You will not receive member requests during that time (or permanently, if you stop volunteering for Viva Village).

## ***ID Badges***

Viva Village gives each volunteer a photo ID badge to wear when providing member services. It is important members have a way to know they can trust the persons coming into their homes.

## ***Reporting Volunteer Hours***

Viva Village asks that you record and report the hours you give to Viva Village. Record your hours in a way that works best for you. Keeping it simple makes it more likely that you will do it.

The first of each month you will receive an email reminder to record your hours from the previous month. This email includes instructions and a link to the webpage.

There are two categories of volunteer hours:

- **Direct Service.** Time spent providing service to members, including preparation and travel time
- **Village Support.** Time spent in other ways that support Viva Village, including administration, community outreach, event planning and working, office work, team meetings, trainings, and travel time.

Drivers have different requirements for tracking rides due to Ride Connection reporting requirements. When reporting Viva Village volunteer hours, drivers should include total drive time to and from your own home.

# **Appendices**

## ***A. Viva Village Values***

**Inclusion** – We respect and welcome people of all ages, races, faiths, ethnicities, nationalities, genders, sexual orientations, and socio-economic levels. We honor their dignity and independence.

**Volunteerism** – Volunteers are the heart of our organization. We value volunteers' expertise and experiences, appreciate their commitment of time and energy, respect their time limitations, and strive to ensure their volunteer work is meaningful.

**Communication** – We invite open and candid communication in meetings and on teams. We solicit ideas and advice from members and volunteers on all aspects of Village processes and projects. We want all voices in the room to be heard.

**Privacy** – We take seriously the privacy of our members, our volunteers, and anyone who entrusts us with information. We do not share any personal or contact information with outside groups. We protect the security of our members when dealing with vendors and service providers.

**Collaboration** – We collaborate on committees, projects, and with the community at large. We strive to build consensus so our decisions and actions have wide support. We recognize that our success depends on mutual interdependence and a caring commitment to one another over time.

**Transparency** – We are honest in our financial dealings and responsive to questions and concerns. We open our meetings to members and volunteers and make meeting notes available.

**Lasting Community** – Viva Village is committed to being here for generations to come. We recognize that our community thrives when we foster an environment of care and continuous learning, when we respond to the technical and social changes of our times, and when we are prudent with our resources.

## **B. Social Topics**

*(Source: Village Without Walls)*

Viva Village welcomes members and volunteers from all cultures, political party affiliations, sexual preferences, and religions. Our community includes many ethnic groups and races. Providing culturally sensitive services is a priority for Viva Village. We strive to understand the needs of each member and volunteer.

Different belief systems, cultural experiences, ethnic origins, family structures, and other factors affect the way an individual experiences aging, illness, daily living, and interaction with others. Along with all Viva Village values, we, as volunteers, represent the value of inclusion by being aware of these social influences and by accepting the individual choices that people make, even when different from our own.

Below are brief descriptions of some of these issues.

### **Drug/Alcohol Issues For Older Adults**

Alcohol and drug problems, particularly prescription drug abuse, among older adults is one of the fastest growing health problems facing the country. Diagnosis may be difficult because symptoms of alcoholism and drug dependency in older individuals sometimes mimic symptoms of other medical and behavioral disorders common among this population, such as diabetes, dementia, and depression. There are many reasons elderly people may turn to alcohol or drugs in later life. Growing older brings on many changes in health, lifestyle, family obligations, work roles, and sources of support. It can also bring physical pain, stress, loneliness, and loss of mobility. Not surprisingly, the signs of alcoholism and drug dependence are different in older adults than in younger people. Abuse among older people is often hidden, overlooked, and misdiagnosed.

Nationwide, there are 2.5 million older adults with alcohol or drug problems, which account for 6 to 11 percent of elderly hospital admissions, 14 percent of elderly emergency room admissions, and 20 percent of elderly psychiatric hospital admissions. Widowers over the

age of 75 have the highest rate of alcoholism in the U.S. Nearly 50 percent of nursing home residents have alcohol-related problems. Older adults are hospitalized as often for alcohol-related problems as for heart attacks.

In Oregon, this trend is similar. A 2017 article published in *The Oregonian* pointed to the problem of alcohol use in our state: "Seniors 65 and older account for the highest rate of alcohol-related deaths in Oregon. Men die from alcohol at a rate twice that of women. In 2015, for example, nearly 150 men in 100,000 in the 65-plus age group died from alcohol-related causes, compared with nearly 80 women."

### **Elder Abuse**

Elder abuse includes any form of mistreatment that results in harm or loss to an older person and includes physical abuse, sexual abuse, psychological abuse, domestic violence, financial abuse, and neglect. Estimates vary, but it is believed that 4 to 6 percent of the elderly are abused.

- Physical abuse is physical force that results in bodily injury, pain, or impairment and includes inappropriate use of restraints.
- Sexual abuse is non-consensual sexual contact of any kind with an older person.
- Psychological abuse is the willful infliction of mental or emotional anguish by threat, humiliation, or other verbal or non-verbal actions.
- Domestic violence can be physical, sexual, or psychological abuse by an intimate partner in order to exercise power and control.
- Financial abuse is the illegal or improper use of an older person's funds, property, or resources.
- Neglect is the failure of a caregiver to fulfill his/her responsibilities for care of the older person.
- Self-neglect is failure to provide for one's own essential needs.

For more information: National Committee for the Prevention of Elder Abuse  
[preventelderabuse.org](http://preventelderabuse.org)

### **Mental Health**

Dementia is a syndrome in which there is deterioration in memory, thinking, behavior, and the ability to perform everyday activities. It mainly affects older people, although it is not a normal part of aging. There are significant social and economic issues in terms of the direct costs of medical, social, and informal care associated with dementia.

Moreover, physical, emotional, and economic pressures can cause great stress to families. Support is needed from the health, social, financial, and legal systems both for people with dementia and for their caregivers.

Depression can cause great suffering and can lead to impaired functioning in daily life. It occurs in 7 percent of the general elderly population and is both underdiagnosed and

undertreated in primary care settings. Symptoms of depression in older adults are often overlooked and untreated because they coincide with other problems such as heart disease, stroke, diabetes, cancer, and Parkinson's disease. Depression also increases the perception of poor health, the use of medical services, and health care costs. Adults aged 65 and older have a suicide rate 50 percent greater than the general population.

## **LGBTQ**

Lesbian, gay, bisexual, and transgender (LGBTQ) individuals experience unique health and social issues. Although largely invisible until very recently, older adults make up a significant (and growing) share of the overall LGBTQ population. The additional challenges to successful aging faced by LGBTQ elders are gaining visibility with the aging of LGBTQ Baby Boomers, who are the first generation of LGBTQ people to have lived openly gay or transgender lives in large numbers. In addition, age, race, ethnicity, socioeconomic status, and geographic location are other factors to consider.

More information can be obtained from National Resource Center for LGBTQ aging: [lgbtagingcenter.org/resources/resources.cfm?st=OR](http://lgbtagingcenter.org/resources/resources.cfm?st=OR)

- Lesbian: female attracted romantically, erotically, and/or emotionally to other females
- Gay: male attracted romantically, erotically, and/or emotionally to other males
- Bisexual: person emotionally, physically and/or sexually attracted to men and women
- Transgender: Category for individuals who challenge gender norms and includes many expressions of gender identity
- Queer: Umbrella term embracing any sexual preference, orientation, or gender expression, recently reclaimed by the LGBTQ community; originally used as a slur
- Questioning: Describes a person exploring gender or orientation identities

Although confronted with the same challenges all people face as they age, LGBTQ elders also face an array of unique barriers and inequalities that can stand in the way of a healthy and rewarding later life. LGBTQ older adults are more likely to be single, childless, estranged from their biological families, and thus more likely to rely on friends and community members as their chosen family. However, official policies and laws often do not recognize these non-traditional caregivers. Last, but not least, is the barrier created by unequal treatment under laws, programs, and services designed to provide a safety net for older Americans; all too often the safety net doesn't provide equal protections for LGBTQ older adults.

More information can be obtained at [lgbtmap.org/lgbt-older-adults](http://lgbtmap.org/lgbt-older-adults)

## **C. Villages NW Policies**

### **Volunteer & Employee Confidentiality Agreement**

*(Adopted by the Villages NW Board of Directors on July 15, 2015; form revised May 3, 2016)*

Villages NW and the Villages in the Villages NW Network have a legal and ethical responsibility to maintain the privacy and confidentiality of all member and donor information. To that end, both Villages NW and all the Villages in its Network will require all their volunteers and staff members to sign and abide by the following confidentiality agreement.

1. Any contact that I have with a member or donor and any information shared with me by a member or donor will remain private and confidential.
2. I will not disclose any member or donor information or discuss any such information with anyone except those persons who have been designated as appropriate to receive this information by the Villages NW Executive Director, Viva Village Manager, the Governing Council chair(s), or the chairs of the Villages NW or Viva Village fundraising, volunteer or membership committees/teams.
3. I will not disclose any member or donor information shared during Villages NW Board meetings, during Viva Village Governing Council meetings, or during the meetings of the Villages NW or the Viva Village fundraising, volunteer or membership committees/teams.
4. I will not make any unauthorized transmissions, copies, disclosures, inquiries, modifications or purging of member or donor information, nor will I use any member or donor lists for any usage without express written consent from Villages NW and Viva Village.
5. I will not access or view any unauthorized proprietary information about Villages NW or Viva Village. If I have a question about whether to access proprietary information, I will ask the Villages NW Executive Director, the Viva Village Manager, or the chair of the Viva Village Governing Council before doing so.

I authorize Villages NW to run a background check, and a credit check if my position will have access to sensitive financial data.

### **Volunteers Opting Out of Providing Specific Services**

*(Adopted by the Villages NW Board of Directors September 21, 2016)*

Villages NW empowers members to live independently with dignity and autonomy. It is our intention to refrain from judging member's choices and activities that are legal in the local community. Services will be fulfilled as long as a volunteer is available and willing.

- Volunteers certainly have the right to decline a specific request if they are uncomfortable or have personal objections.

- When such a request is received by the volunteer from the office, he or she may decline.
- Should a request be added to a pre-existing service, the volunteer may decline based on standard policy that additional requests need to go through the office.
- Should there be a safety issue with the property or a member is impaired when the volunteer arrives, the service may be declined, and the request referred back to the office.
- Volunteers are under no obligation to make a purchase on behalf of the member. If volunteers observe chronic impairment or intoxication, this should be reported to the Village office under the same guidelines as any other sign of mental or physical deterioration.

### **Nondiscrimination Policy**

*(Adopted by the Villages NW Board of Directors April 22, 2015)*

As a 501(c)(3) nonprofit organization, Villages NW-Metro is committed to providing an environment that is free from discrimination in employment, volunteering, membership, and all other opportunities for organizational participation because of race, color, religion, creed, national origin, ancestry, disability, gender, gender identity, sexual orientation, military status, or age.

The Villages NW Board has issued the following policy stating Villages NW's views in this matter. It is the policy of Villages NW to:

- Strictly follow personnel procedures that will ensure equal opportunity for all people without regard to race, color, religion, creed, national origin, gender, sexual orientation, gender identity, age, ancestry, marital status, disability, veteran or draft status.
- Make reasonable accommodations wherever necessary for all volunteers, employees, members or applicants with disabilities, provided that the individual is otherwise qualified to safely perform the duties and assignments connected with the job or activity and provided that any accommodations made do not require significant difficulty or expense.
- Provide an inclusive and welcoming environment for all members of our staff, volunteers, subcontractors, vendors, and clients.
- Achieve understanding and acceptance of Villages NW's policy on nondiscrimination by all volunteers, employees, members, and by all the communities in which Villages NW operates.
- Thoroughly investigate instances of alleged discrimination and take corrective action if warranted.
- Be continually alert to identify and correct any practices by individuals that are at variance with the intent of our nondiscrimination policy.

## **Villages NW Network Grievance Policy & Procedure**

*(Approved by the Villages NW Board of Directors, July 15, 2015)*

Under this policy, a grievance is defined as any event, condition, rule, or practice which an employee or volunteer believes violates his or her civil rights, treats him or her unfairly, or causes him or her any degree of unpleasantness or unhappiness while working for or volunteering with Villages NW or any of the Villages in the Villages NW Network. A grievance may also deal with an attitude, or an opinion or statement held by a staff member or fellow volunteer.

Grievances are of concern to Villages NW, regardless of whether the problem is large or small. To provide prompt and efficient evaluation of, and response to grievances, Villages NW has established a procedure for all employees and volunteers. It is Villages NW's policy to give full consideration to every person's opinion. There will be no discrimination against or toward anyone for his or her part in presenting a grievance. All grievances will be handled confidentially.

The grievance procedure:

1. If urgent action is needed, notify the Villages NW Executive Director and the chair of your Village's Governing Council or Coordinating Team—if your grievance is on the Spoke Village level—immediately.
2. Attempt to discuss your grievance with the Villages NW Executive Director or the chair of your Village's Governing Council or Coordinating Team—if your grievance is on the Spoke Village level—to work out the problem.
3. If you are unsatisfied, submit your complaint in writing to the Villages NW Executive Director. If your complaint is with the Executive Director, then submit it to the President of the Villages NW Board of Directors.
4. A response should be made within 5 business days.
5. If you are not satisfied within 5 days of how your written complaint was handled, you may appeal by submitting your written complaint to the President of the Villages NW Board of Directors.
6. The President of the Villages NW Board should respond within 5 business days.
7. If you are still unsatisfied, you may ask that your written complaint be taken to the Executive Committee of the Villages NW Board. Within 30 days, the Executive Committee will act on your grievance, affirming or denying your request, choosing to investigate further, or choosing to take the matter to the entire Board. The Executive Committee's decision is final.

### **Portion of this Policy Specific to Employees**

If an employee feels that inappropriate corrective action has been taken against him/her, and the employee has been unable to resolve the matter informally by speaking with the Village NW Executive Director and/or the chair of the Village's Governing Council—if the

grievance is on the Spoke Village level—the employee may file a written grievance with the Villages NW’s Board Executive Committee within 10 business days of the taking of the action.

The VNW Board Executive Committee will conduct an investigation of the incident, where appropriate, and will generally provide a written response to the employee within 20 business days. If more time is needed to respond to the complaint, the person filing the complaint will be so notified. The decision of the Board Executive Committee is final.

The filing of a grievance does not operate to suspend the action being complained of. For instance, if the employee is complaining that he/she was unfairly suspended without pay, he/she will remain suspended without pay for the period initially determined, unless and until the Board Executive Committee reverses the decision leading to the suspension. Similarly, Villages NW and the members of its Spoke Village Network have no obligation to keep a terminated employee on the payroll or enrolled in any benefits not ordinarily available to terminated employees, pending completion of the grievance process.

### **Whistleblower Policy**

*(Adopted by the Villages NW Board of Directors February 2015)*

Villages NW is committed to operating in furtherance of its tax-exempt purposes and in compliance with all applicable laws, rules and regulations, including those concerning accounting and auditing, and prohibits fraudulent practices by any of its employees, contract staff, or volunteers, including, but not limited to, Villages NW Board members and officers, and the leaders and members of all its Spoke Village planning groups, governing councils, and coordinating teams.

This policy outlines a procedure for employees, contract staff, and volunteers to report actions that an employee, contract staff or volunteer reasonably believes violates a law, or regulation or that constitutes fraudulent accounting or other practices. This policy applies to any matter which is related to Villages NW’s business and does not relate to private acts of an individual not connected to the business of Villages NW.

If an employee, contract staff or volunteer has a reasonable belief that Villages NW or an employee, contract staff or volunteer associated with Villages NW or any of the Villages in the Villages NW Hub & Spoke Network has engaged in any action that violates any applicable law, or regulation, including those concerning accounting and auditing, or constitutes a fraudulent practice, the employee, contract staff or volunteer is expected to immediately report such information to the Villages NW Executive Director. If the employee, contract staff or volunteer does not feel comfortable reporting the information to the Executive Director, he or she is expected to report the information to the President of the Villages NW Board of Directors.

All reports will be followed up promptly, and an investigation conducted. In conducting its investigations, Villages NW will strive to keep the identity of the complaining individual as confidential as possible, while conducting an adequate review and investigation.

Villages NW will not retaliate against an employee, contract staff or volunteer in the terms and conditions of employment or Village membership because that individual:

(a) reports to a supervisor, to the executive director, to the Board of Directors what that individual believes in good faith to be a violation of the law; or (b) participates in good faith in any resulting investigation or proceeding, or (c) exercises his/her rights under any state or federal law(s) or regulation(s) to pursue a claim or take legal action to protect the individual's rights.

Villages NW may take disciplinary action (up to and including termination) against an employee, contract staff or volunteer who in Village NW's assessment has engaged in retaliatory conduct in violation of this policy.

In addition, Villages NW will not, with the intent to retaliate, take any action harmful to any employee, contract staff or volunteer who has provided to law enforcement personnel or a court truthful information relating to the commission or possible commission by Villages NW or any of its employees, contract staff or volunteers of a violation of any applicable law or regulation.

Supervisors will be trained on this policy and Villages NW's prohibition against retaliation in accordance with this policy.

### **Sexual Harassment Policy**

*(Adopted by the Villages NW Board of Directors June 17, 2015)*

Villages NW-Metro is firmly committed to maintaining a positive working and volunteer environment, which is free of inappropriate conduct, including offensive verbal and written communication of a sexual nature with its staff, Board, volunteers, vendors, contractors, and Village members, both on the administrative (hub) and program (spoke Village) levels.

Sexual harassment is defined as unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature constitute sexual harassment when:

- (a) submission to such conduct is made (explicitly or implicitly) a term or condition of the individual's employment or volunteering;
- (b) submission to or rejection of such conduct is used as the basis for employment or volunteer decisions affecting the individual; or
- (c) such conduct has the purpose or effect of creating an intimidating, hostile, humiliating, or offensive work or volunteer environment.

This policy applies to all work-related settings and activities, whether inside or outside the workplace, and includes business trips and business-related social events. Villages NW's or its spoke Village program's property (e.g. telephones, copy machines, facsimile machines, computers, and computer applications such as e-mail and Internet access) may not be used to engage in conduct that violates this policy. Villages NW's policy

against harassment covers employees and other individuals who have a relationship with Villages NW and our spoke Village programs which enables Villages NW to exercise some control over the individual's conduct in places and activities that relate to Villages NW's work (e.g. directors, officers, contractors, vendors, members, volunteers, etc.).

While it is not possible to list all of the circumstances which would constitute sexual harassment, the following are some examples: (1) unwelcome sexual advances -- whether they involve physical touching or not; (2) requests for sexual favors in exchange for actual or promised job benefits such as favorable reviews, salary increases, promotions, increased benefits, or continued employment; or (3) coerced sexual acts.

Depending on the circumstances, the following conduct may also constitute sexual harassment: (1) use of sexual epithets, jokes, written or oral references to sexual conduct, gossip regarding one's sex life; (2) sexually oriented comment on an individual's body, comment about an individual's sexual activity, deficiencies, or prowess; (3) displaying sexually suggestive objects, pictures, cartoons; (4) unwelcome leering, whistling, deliberate brushing against the body in a suggestive manner; (5) sexual gestures or sexually suggestive comments; (6) inquiries into one's sexual experiences; or (7) discussion of one's sexual activities.

While such behavior, depending on the circumstances, may not be severe or pervasive enough to create a sexually hostile work or volunteer environment, it can nonetheless make volunteers, employees, members, Board members, contractors, or other individuals connected with Villages NW uncomfortable. Accordingly, such behavior is inappropriate and should be avoided regardless of whether it is unlawful.

Any employee, member or volunteer who feels he/she may have been subject to sexual harassment or inappropriate sexual conduct should take the complaint directly to the Villages NW Executive Director or to the President of the Board of Directors, should the concern be about the Executive Director. Villages NW's volunteers, staff and Board members who are bothered by the behavior of any individual they encounter at one of our offices, at our functions, while volunteering, or while traveling on behalf of the organization have a responsibility to report the matter. Complaints will be promptly investigated and appropriate action will be taken against the offender.

It is also unlawful and expressly against Villages NW's policy to retaliate against an employee for filing a complaint of sexual harassment or for cooperating with an investigation of a complaint of sexual harassment.

However, Villages NW also explicitly prohibits its staff and volunteers from making inflammatory and malicious accusations of misconduct. Disagreements between volunteers or employees and their supervisors about work do not qualify as sexual harassment if no discrimination is involved, nor is it considered harassment for a supervisor or manager to require volunteers or employees to meet performance or conduct standards.

**Notes:**