



**TRAIL of Johnson County**  
**MEMBER SUPPORT SPECIALIST HANDBOOK**

## **WELCOME MESSAGE**

Welcome to TRAIL of Johnson County! We are so pleased you have decided to take an active role with TRAIL as a Member Support Specialist. We hope your volunteer time with TRAIL will be rewarding and challenging. You will often be the first point of contact for new members and the channel through which our members will request services. TRAIL could not operate without this position and we're so thankful for your commitment.

This handbook contains information about your position and important information about TRAIL that will be important to know as you liaise with our members and the public. Please take the time to read through this handbook. No employee handbook can address every situation that may arise. If you have questions about your position, please ask them. TRAIL reserves the right to interpret, modify, or supplement the provisions of this Handbook at any time.

Thank for your commitment to Iowa's first aging-in place support organization. We're so grateful to have you join us.

All the best,

Hillary Ramaker, Executive Director  
TRAIL of Johnson County

## IMPORTANT CONTACT INFORMATION

Hillary Ramaker

[Hillary@trailofjohnsoncounty.org](mailto:Hillary@trailofjohnsoncounty.org)

Work cell: (319) 359-9110 – please don't give this out to members

Personal cell: (319) 321-2503 – for Member Support Specialists only

Board President – David Rust

[David@trailofjohnsoncounty.org](mailto:David@trailofjohnsoncounty.org)

Volunteer Coordinator – Maggie Elliot

[Maggie@trailofjohnsoncounty.org](mailto:Maggie@trailofjohnsoncounty.org)

Marketing – Susan Shullaw

[Susan@trailofjohnsoncounty.org](mailto:Susan@trailofjohnsoncounty.org)

[Marketing@trailofjohnsoncounty.org](mailto:Marketing@trailofjohnsoncounty.org)

Vendors – Joy Smith

[Joy@trailofjohnsoncounty.org](mailto:Joy@trailofjohnsoncounty.org)

[Vendors@trailofjohnsoncounty.org](mailto:Vendors@trailofjohnsoncounty.org)

Board Members

Charlie Anderson [Charlie@trailofjohnsoncounty.org](mailto:Charlie@trailofjohnsoncounty.org)

Michelle Buhman [Michelle@trailofjohnsoncounty.org](mailto:Michelle@trailofjohnsoncounty.org)

Diana Lundell [Diana@trailofjohnsoncounty.org](mailto:Diana@trailofjohnsoncounty.org)

Nancy Hauserman [Nancy@trailofjohnsoncounty.org](mailto:Nancy@trailofjohnsoncounty.org)

Linda McGuire [Linda@trailofjohnsoncounty.org](mailto:Linda@trailofjohnsoncounty.org)

TRAIL of Johnson County

28 South Linn Street, Room 201

Iowa City, IA 52240

Ph. 319-800-9003

[Info@trailofjohnsoncounty.org](mailto:Info@trailofjohnsoncounty.org)

Senior Center – building related questions, copy machines, locked doors etc.

Kristin Kromray, Operations Assistant

319-356-5221

[kristin-kromray@iowa-city.org](mailto:kristin-kromray@iowa-city.org)

Johnson County Crisis Center

(319) 351-0140

Wi-Fi Network: CIC-GUEST

You'll need to log in each day via the City of Iowa City's acceptance page.

## **DAILY RESPONSIBILITIES**

### *Check voice messages and answer the phone during office hours (M-F, 9 am – 1 pm)*

1. Remove “Do Not Disturb” status from the phone at the beginning of your shift. Review voice messages by pressing the “Message” button (with the envelope icon) and entering password 19003.
2. If possible, the MSS should respond to voicemail accordingly. Messages specifically for the ED should be emailed to [Hillary@trailofjohnsoncounty.org](mailto:Hillary@trailofjohnsoncounty.org).
3. At the end of the shift, set the phone status to “Do Not Disturb”.

### *Greet walk-in traffic (including members, volunteer, and interested persons)*

1. People often want to stop and chat, as our office is located in a centrally located place in the senior center. Be friendly and helpful. Many of the inquiries will not be related to TRAIL business, but we want to be good partners for the senior center.
2. As appropriate, make materials available to walk-in traffic (i.e. brochures to interested people, applications to potential members, copies of the most recent newsletter to members).
  - a. Copies of frequently used materials are on the shelving unit next to the printer. You may print many other related materials from the Member Documents section of our website (our printer is “HP OfficeJet Pro 8710”). To make a large number of copies, you may use the senior center copiers (on the 1<sup>st</sup> floor and mezzanine levels) using code 18470. If questions arise regarding use and Hillary is not available, see Kristin Kromroy on the first-floor lobby for assistance.

### *Assist potential members with the application process and help new members access member benefits*

1. Members will often have questions about the application process. Review the instructions regarding how to join on our website:  
<http://trailofjohnsoncounty.org/membership/how-to-join>.
  - a. The MSS team may assist affiliate members in joining TRAIL. You may assist with filling out paper applications or online applications with a prospect in the office or over the phone. The MSS team must refer any potential full member to Hillary before they are approved as a full member; you may assist with their application as much as they request, but they must have a conversation with Hillary before they are permitted to complete the process.
2. Members receive the document “New-member welcome April 2017” (available in the member documents section of the website) in an email from Hillary when they have completed the application and have paid the dues. Familiarize yourself with the document, as many members have questions about accessing their online benefits.
  - a. If a member doesn’t want to use the website, notify Hillary and make a note in the Member Notes (Control panel -> Member Manager -> Search for the

member -> sticky note icon). We can provide the member with paper copies of any of the benefits (including the monthly newsletter).

3. Members and non-member volunteers may call the TRAIL office regarding problems logging into to the password-protected sections of the website. Use the following instructions to reset the password information.
  - a. Members: follow the path Control panel -> People -> Member Manager. Search for the member and filter as necessary. Click on the pencil icon to visit the member profile. Under the website heading, click "Reset Password". Click "OK" on the pop up box. The member will get an email with the user name and temporary password.
  - b. Non-Member Volunteers: follow the path Control panel -> Services -> Set up -> Service Providers. Search for the service provider/volunteer and filter as necessary. Click on the gear and key icon (far right) to reset the password. Click "OK" on the pop up box. The volunteer will receive an email with the user name and temporary password.

ervice provider(s) found)

Type	Visible	Last Svc Date	Rating	Fully Vetted	Maintain
Non-Member Volunteer	Yes		N/A	Yes	       



- c. User name and passwords are automatically generated by Club Express. If a member wants to choose another user name or password, they can follow the path Member Profile -> Website -> User Name/Password, where the member will see prompts to change their log in information. Remember: administrative staff can provide members with their user names, but we have no way to see or retrieve passwords set by members. We can only send a prompt to have the member reset it.

#### Update appropriate member-related data in our website

1. Log on the desktop computer using the user account "TRAIL Volunteers". Select Sign-In; there is no password required.
2. Log any contact with members or non-members in the appropriate database (Control panel -> Member Manager OR Non-Member Database).
  - a. Control panel -> People -> Member Manager -> Search for member -> log icon.

Search Results (1 members found) Page 1 of 1

#	Member	Membership	Maintain
4 (Primary)	Maggie Elliott (melliott) Iowa City, IA	Full Individual Member Annual Payment Plan Exp. Date 4/27/2018 Active	

- b. Click “add contact log entry”. Fill in appropriate information, including contact type and contact category. For responsible staffer, select Member Support. Save.

### Add / Edit Contact Log Entry

Add or edit the Contact Log Entry. Then click "Save" or "Cancel".

Member: Maggie Elliott

Initial Log Date: 6/20/2017

Follow-up Date:

Contact Type: Phone Call

Contact Category: Service Request

Subject: Call from Maggie - EXAMPLE ONLY

Description: Call from Maggie, request for service provider suggestion. Given phone numbers and names for possibilities. No follow up needed. EXAMPLE ONLY-NOT A REAL REQUEST.

Status:  Open  Closed

Priority:  Urgent  High  Medium  Low

Responsible Staffer: Member Support

Communicate with the MSS Team through the MSS forum and member logs.

1. Read notes from the previous shift by reviewing the “Member Support Specialist Log” (FOR MEMBERS -> Message Boards -> Member Support Specialist Log”. Follow-up with any outstanding items from the previous day.
  - a. At the end of your shift, enter any notes from the day and any instructions for incomplete activities. (i.e. any phone calls that need to be made the following day, the status of open service requests, appointments scheduled for members coming into the office).

Work with members to understand their needs, enter their service requests into the software system, and following up with volunteers by email or phone as necessary.

Members may request services via phone or email, or by stopping in the TRAIL office during office hours. The MSS team is responsible for gathering the details of the service request and entering the appropriate information in our website.

1. Review and answer emails sent to [membersupport@trailofjohnsoncounty.org](mailto:membersupport@trailofjohnsoncounty.org) (this is a Gmail account).
  - a. Visit [gmail.com](http://gmail.com) and select the appropriate email address.
    - i. Password: Trail2017
  - b. The member may or may not have provided the appropriate information in the initial email inquiry. Follow-up with member via email or phone to gather all the necessary details.
2. Enter service requests by using the instruction manual provided in the TRAIL office. You'll also use these instructions to find a service provider (volunteer) for any open requests. See Hillary with questions.
  - a. If we are unable to locate a volunteer for a service request, notify Hillary immediately.
3. When taking a request from a member, confirm on our website they are a full member (Control panel -> People -> Member Manager -> Search for member -> locate membership type under "Membership" column. (Affiliate members are not allowed to make service requests).

4. Use the following questions when taking the details of a service requests:

All requests:

- 1) Do you have any health or mobility issues the volunteer should know about?
- 2) Are there any animals in the house?
- 3) (If applicable) Will the necessary tools and/or supplies be provided?
- 4) You'll receive email confirmation with the volunteer name and contact information.  
Would you like a phone call from the TRAIL office with the information as well?
- 5) Would you like the volunteer to call you the day prior to the service request?

Transportation only:

- 1) Do you use any assisted devices? (If so, ask about size and weight)
- 2) Do you have any difficulty getting in and out of certain vehicles?

Medical advocacy:

- 1) Do you need transportation to the appointment or should the volunteer meet you at the appointment?

Rise and shine:

All requests should be referred to Hillary.



## GUIDELINES FOR USING “NOTES” FEATURES IN CLUB EXPRESS

On member and non-member records (including vendors and volunteers) in Club Express are several places where “Notes” or “Contact Log” entries can be made about the individual, his/her history or preferences, etc. This is how we prefer each of these information-recording options be used for TRAIL:

**Contact Log:** Available for use on both member and non-member records. Not visible to member or non-member when accessing our website, but can be seen by CE administrators or CE coordinators with Member Manager and Non-Member Database access. Should be used to record when an individual contacts TRAIL with a request, complaint or suggestion needing follow-up; and/or to record contacts TRAIL has made to an individual in response to request, to make a request, etc. Think of the Contact Log as a “customer relationship management” (CRM) tool for tracking member and non-member interactions that may be important for TRAIL staff and volunteers to know. The Contact Log also should be used to record family and friend relationships. Log entries are searchable by member/non-member name.

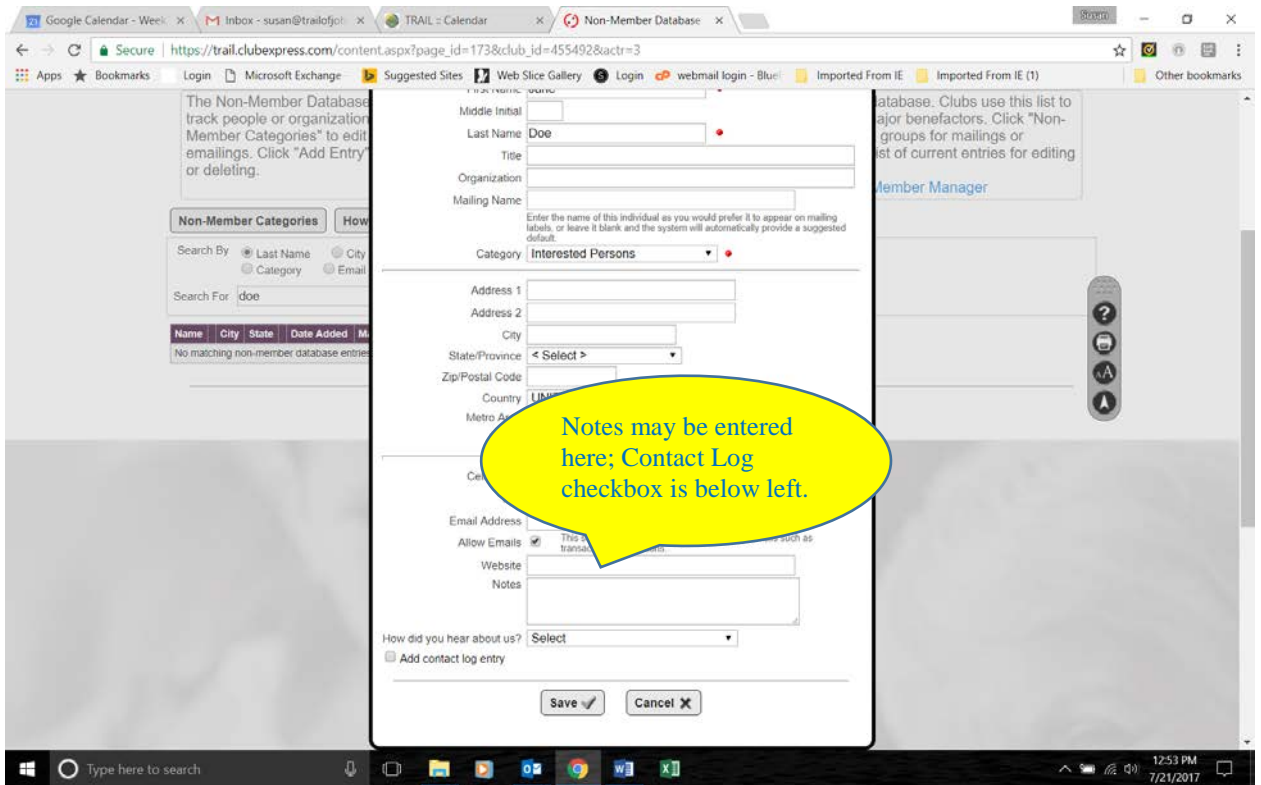
**Notes:** Available for use on both member and non-member records. Not visible to member or non-member when accessing our website, but can be seen by CE administrators or CE coordinators with Member Manager and Non-Member Database access. Best used to record brief “need to know” information for internal use that is not captured elsewhere on member or non-member profile (limited to 2000 characters total). Examples: payment and/or communication preferences.

**Service Provider General Notes:** Available only on Contractor records, not for member or non-member volunteer service providers. Can be seen by Club Express administrators or CE coordinators with service function access, but not by members or other visitors accessing our website. Best used for important internal info not otherwise collected on contractor’s profile page.

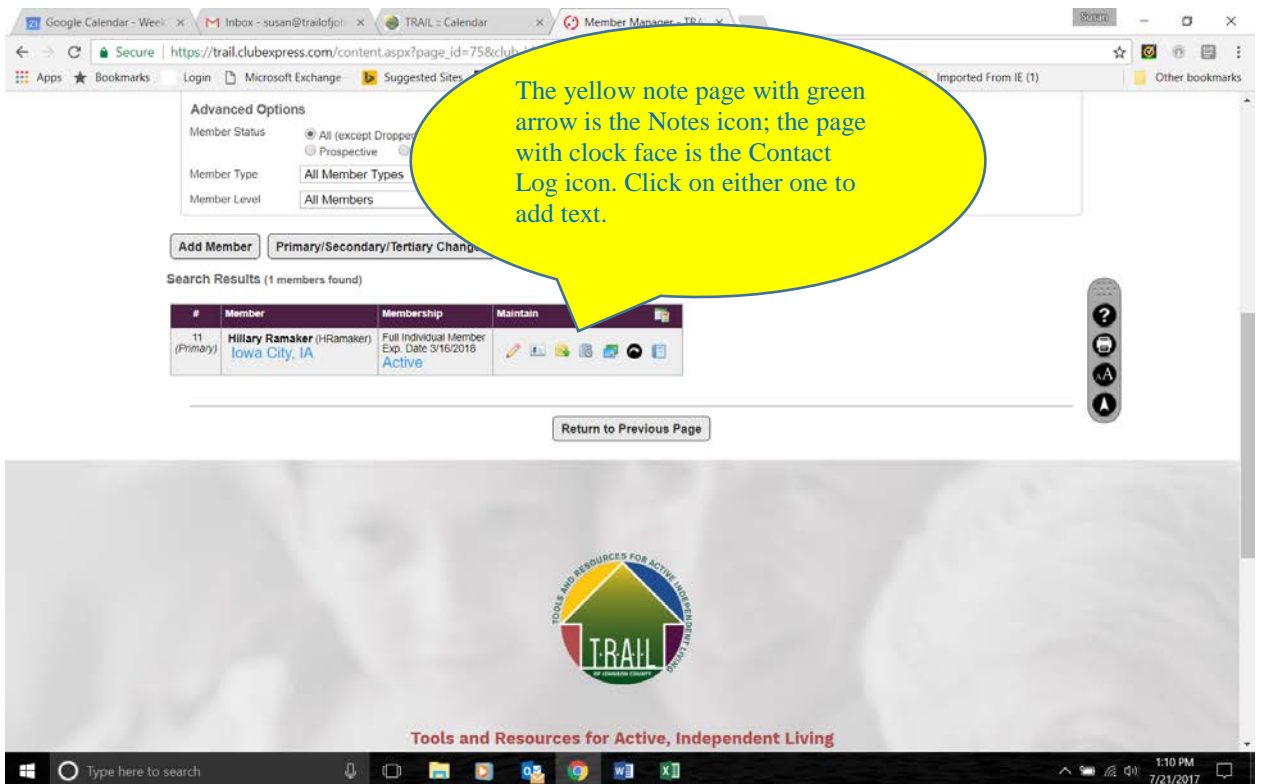
**Service Provider Discount Notes/Payment Terms:** Text entered here appears along with the service provider’s name and contact info on our website, when a member clicks on “Find a Service Contractor” and specifies category and service. Use for pertinent info about service specialties, fees, and other pertinent (and public) info that would be useful to members in selecting a vendor. Because these notes are published and available to the public, please proofread before posting.

Screen shots of these options appear on the following pages.

**Non-member Notes and Contact Log entries** appear at the bottom of the **non-member profile** (accessed by clicking on the pencil icon next to their name on the non-member list):



To add Notes or Contact Log entries to a **member profile**, find their listing through the Member search function and select the appropriate icon to the right of their name:



For **contractor/service providers**, the **General Notes** and **Discount Notes/Payment Terms** boxes appear at the bottom of the individual's profile page (accessed by clicking on the pencil icon next to their name when searching through the contractor list):

The screenshot shows a web browser window with the URL [https://trail.clubexpress.com/content.aspx?page\\_id=...](https://trail.clubexpress.com/content.aspx?page_id=...). The page displays a contractor profile for Jane Hagedorn, with a search filter on the left and a form for editing the profile on the right. A yellow callout box is overlaid on the form, containing the text: "General Notes" cannot be seen by members or others visiting our website, but all text entered in the "Discount Notes/Payment Terms" box is visible to members searching for lists of contractors in our various service categories. The form includes fields for "General Notes" (which is empty) and "Discount Notes/Payment Terms" (which contains the text: "In business 37 years, serving Iowa City and surrounding areas. Will act as remodeling contractor for bathroom remodels. Does drain repair (not cleaning). Special"). Below the form are "Save" and "Cancel" buttons. The Windows taskbar at the bottom shows the time as 1:22 PM on 7/21/2017.

## MEMBERSHIP LEVELS

### LEVEL 1: FULL MEMBERSHIP

Fees: \$600/year (\$50/month) for single individuals, or \$960/year (\$80/month) for households with two or more members.

Benefits and services:

- Volunteer assistance to meet needs such as daily check-in, transportation, light handy-person assistance, home technology assistance, health care services navigation and advocacy, and house checks when you are away (complete list of [service categories and services](#))
- Access to prescreened professional service providers to meet service needs beyond the capacity of volunteers; these providers are screened by TRAIL to ensure reliability, expertise, fair pricing, and overall customer satisfaction.
- Participation in TRAIL-sponsored social events, such as book groups, card parties, coffees, educational programs, group outings
- TRAIL newsletter

### LEVEL 2: AFFILIATE MEMBERSHIP

Fees: \$100/year for single individuals and \$160/year for households of two or more individuals.

Benefits and services:

- Access to prescreened professional service providers
- Participation in social activities
- TRAIL newsletter

## HOW TO JOIN

[Affiliate Membership application](#) can be downloaded and printed or completed online by clicking SIGN UP FOR MEMBERSHIP on <http://www.trailofjohnsoncounty.org/membership/how-to-join>.

If someone is having trouble signing up, it's likely they are already pending in the system. Please refer the issue to the ED.

Full membership application is in two parts ([Part 1](#) and [Part 2](#)). They can download and print at home or we can mail them a paper copy. If they choose to begin the signup process online, that's fine. However, the system won't let full members enroll – the ED will need to talk with the membership before finalizing the application.

Members are welcome to pay online via credit card or EFT. Monthly payments are accepted for full membership only. Please refer any requests for membership upgrade (from affiliate to full) to the ED.

When your application and fees have been processed, you'll receive a welcome message with information about how to begin accessing your member services and activities. We want to encourage new members to attend the upcoming Monthly Member Social; the first 20-30 minutes of each social are dedicated to a new member orientation. (Questions about the social or content of the orientation should be directed to Membership Committee Chair David Rust).

## SUPPORTED MEMBERSHIPS

We strongly believe in the importance of remaining healthy and independent in the home of one's choice, regardless of income. We offer a reduced fee to older adults who cannot afford standard fees. The Executive Director administers the Supported Membership program. As part of the application process the Executive Director will review documents to establish proof of income (for example, the most recent tax form). These memberships are offered based on funding available. The list of supported memberships is confidential, known only to the Executive Director and her/his designee. If you believe you qualify or if you have any questions, please contact the Executive Director.

## **MISSION STATEMENT**

TRAIL\* of Johnson County is a nonprofit organization that aims to help older residents live and age safely and comfortably in their own homes by providing access to essential services and socializing opportunities.

\*Tools and Resources for Active Independent Living

## **OVERVIEW**

Our mission is to sustain and enrich the lives of local community residents for the long term. To carry out this mission, TRAIL provides or helps to arrange for a wide variety of services that meet the needs and expectations of its members. As a community-based organization, we rely on a cadre of able and generous volunteers who are ready to fulfill most requests.

TRAIL was organized in 2014 by a group of Iowa City-area neighbors and friends, at or near retirement age, who are committed to “aging in place.” Rather than moving to traditional senior-living facilities, we prefer to remain in our own homes as we grow older, close to our established social circles. Our alternative to moving to a residence for seniors is to arrange for needed services and programs to be brought to our doorsteps.

This is not a new idea; the concept of naturally occurring retirement communities (NORCs) – a geographically defined community in which some portion of the population is 60 or older and live in their own homes – first appeared in the 1980s, and the first “aging-in-place village” was founded in Boston in 2000. Since then, these projects have been successfully implemented across the country. We have learned much from the Village to Village Network (<http://www.vtvnetwork.org/>), which provides tools and resources to help communities establish and manage aging-in-place organizations throughout the nation.

Ironically, given that Iowa is one of the demographically oldest states in the nation, there have been no such organizations in the state. Because Iowa City is consistently cited in the national media as a highly desirable retirement destination (rated as the #1 small metro area in Milken’s “Best Cities for Successful Aging” report), it seems only fitting that Iowa’s first aging-in-place project has been established in Johnson County.

## **TRAIL'S ORIGIN STORY**

TRAIL began in early 2015 when two groups of Iowa City friends and retirees, both of which were exploring ways to remain in their own homes as they grow older, found one another and began a new collaboration. One group included retired UI faculty, staff and friends who, with generous grants from the UI Retirees Association, purchased membership in the Village to Village Network (VtV), an affiliation of more than 250 aging-in-place organizations nationwide. VtV gave the UI group access to webinars and helped establish a mentoring relationship with SAIL (Sharing Active Independent Lives) in Madison, WI. The UI group also reached out to local partners, such as the UI Waterman Iowa Nonprofit Resource Center, Livable Community, Elder Services, and the Retired Senior Volunteers Program (RSVP), to expand their knowledge about aging-in-place options. Meanwhile, a separate group of friends in Iowa City's Northside neighborhood, who hoped to continue living and aging in their multigenerational neighborhood instead of moving to senior-living communities, had been researching these issues as well. The Northside group discovered the UI group in a listing on the VtV website, and when the two groups came together to combine their knowledge, resources, and aging-in-place mission, TRAIL was born.

## VILLAGE TO VILLAGE NETWORK

<http://www.vtvnetwork.org/>

**ABOUT:** In 2010, the Village to Village Network – a national organization that collaborates to maximize the growth, impact and sustainability of individual Villages and the Village Movement – was formed. The Network provides expert guidance, resources and support to help communities establish and maintain their Villages. The Village Movement started with Beacon Hill Village in Boston over 15 years ago and today there are over 200 open Villages and more than 150 in development in 45 states and the District of Columbia. Village to Village Network and the Village Movement will not only impact Villages and their members, but the lives of countless families, caregivers and members of the broader community they serve.

**MISSION:** The Village to Village Network is the essential tool that enables community members to build and sustain thriving Villages. The Network creates interactions that connect Villages with resources, education and expertise.

**VISION:** Through innovation, collaboration, advocacy and inclusion, the Village to Village Network expands opportunity, choice, support and care for all older people.

**WHY VILLAGES ARE NEEDED:** Villages are well positioned to improve the **population health** of the communities they serve. Until the year 2029, 10,000 people will turn 65 on a daily basis. In Britain and the United States, roughly one in three people older than 65 live alone, and in the United States, half of those older than 85 live alone. Studies in both countries show the prevalence of loneliness among people older than 60 ranging from 10% to 46%.

“The profound effects of loneliness on health and independence are a critical public health problem,” said Dr. Carla M. Perissinotto, a geriatrician at the University of California, San Francisco. “It is no longer medically or ethically acceptable to ignore older adults who feel lonely and marginalized.” Research shows that 60% of health outcomes are based on behavioral, socio-economic and environmental factors.

Village members experience **reduced isolation, increased independence, and enhanced purpose of life.** “Villages are instrumental in helping people remain in their homes and independent in their communities.” - Ilene Henshaw, AARP, Department of Government Affairs.



## **ORGANIZATION**

TRAIL is a stand-alone IRC Sec. 501(c)(3) organization governed by a volunteer Board of Directors. The current board members (through 12/31/17) are:

- David Rust, Chair
- Charlie Anderson, Past Chair
- Susan Shullaw, Secretary
- Maggie Elliott, Treasurer
- Michelle Buhman, Chair Elect
- Nancy Hauserman
- Diana Lundell
- Linda McGuire
- Joy Smith

### **Executive Director**

The Executive Director (ED) is the chief administrator of TRAIL and reports to the board. The ED manages the daily, regular business and affairs of TRAIL and is responsible for planning and implementing objectives and policies as directed by the board. A primary responsibility of the ED is to ensure that all services are provided to members in a timely, friendly, and efficient manner. The ED is responsible for growing and maintaining an active volunteer program and a list of Prescreened Service Providers. The ED serves as a resource for educating others in the community about TRAIL, and invites and promotes a vision for the future of TRAIL.

The chair of the Board and the Executive Director work closely to ensure the vision of the organization is carried out. Board members report to the Chair of the Board and staff report to the Executive Director. The Executive Director reports to the Chair of the Board.

### **How to Request TRAIL Services**

An Executive Director and volunteers staff TRAIL OF JOHNSON County. TRAIL members are asked to submit their request for services in the manner that is most convenient:

- Call our office: 319-800-9300
- Email us: [membersupport@trailofjohnsoncounty.org](mailto:membersupport@trailofjohnsoncounty.org)
- Or visit us in person at the TRAIL Office in Room 201 of the Iowa City-Johnson County Senior Center, 28 South Linn Street, Iowa City; Hours: Monday-Friday, 9AM-1PM

As a courtesy to our volunteers, TRAIL asks that all members request services one week (minimum three business days) prior to the time they would like the service to occur. Exceptions can be made for urgent requests. In the event of a life-threatening emergency, call 911.

The TRAIL office will not be open and staff will not be available on City of Iowa City holidays. These holidays will be posted on the TRAIL calendar. Should you need assistance during a holiday, we recommend you contact the Iowa City Crisis Center 24-hour Crisis Line at (319) 351-0140.

TRAIL employs a volunteer-first policy. This means we will make every effort to assign a volunteer to meet member requests, but the availability of volunteer assistance may depend on the amount of notice given, the needs of other members during the same period, the weather, and other factors. If no volunteers are available, or the service requires a professional, TRAIL will refer members to our approved service providers. If a member elects to use a provider, the member contacts the provider, mentions membership in TRAIL and contracts with the service provider for payment.

Occasionally, it may be necessary for a member to change or cancel an appointment. TRAIL requests that members communicate this to TRAIL as early as possible so we may inform the assigned volunteer(s).

## **Volunteer Services**

### **Transportation**

Volunteer drivers provide door-to-door transportation and often door-through-door transportation. Drivers can provide transportation for regularly scheduled trips, periodic trips, and last-minute trips. When appropriate, the volunteer driver will assist the member to and from the front door of his or her home, and help carry packages. Trip destinations typically include grocery stores, medical appointments, worship services and social and educational events.

### **Home Services**

The assistance provided by volunteers in the home is as varied as the members we serve. Volunteers can assist with tasks such as helping with paper work; assistance with technical equipment (e.g., computers, DVD players, or phones); helping with minor household chores and simple repairs; helping with meal preparation; mailing packages; shopping for groceries; running errands; watching your home while you are away; or going for a walk with a member. Volunteers may also serve in a consultant capacity by providing information and advice, discussing the need for home maintenance and repair, and helping the member negotiate with professional service providers.

### **Rise and Shine Program**

Rise and Shine is for members who want to connect to TRAIL on a daily basis to ensure their safety and enjoy the social interaction TRAIL provides. Participating members are paired with a TRAIL volunteer and the two become Rise and Shine partners, agreeing on a time and method of communication, whether by phone call, e-mail, or text. They connect each day. If the connection is not made, the volunteer contacts the TRAIL office and that sets in motion a series of steps, including a follow-up call. If needed, a TRAIL volunteer makes a home visit.

### **Medical Advocacy**

A TRAIL volunteer will accompany a member to a medical appointment, ask questions and take notes, and review pertinent information and instructions with the member.

### **Prescreened Service Providers**

One benefit of TRAIL membership is access to a list of service providers (businesses and professionals, either for-profit or nonprofit) that have been screened by the TRAIL Vendor Committee and/or the Executive Director. Potential service providers are referred to TRAIL by our members, our board, and committee members and community partners. Additionally, service providers interested in the Prescreened Service Provider Program may self-refer. Service providers are invited to complete an application and supply the names of three customers willing to be contacted as references. TRAIL contacts references to screen providers for reliability, expertise, fair pricing, and overall customer satisfaction. If the screening criteria are met, TRAIL invites the provider to sign an agreement and become part of the Prescreened

Service Provider Program. A listing of prescreened service providers is available to our members through the TRAIL office and on a password-protected section of our website.

## OBJECTION RESPONSES

We're "new".

TRAIL began accepting members on April 24, 2017, but we're still a very young nonprofit, dependent on the work of volunteers and a one-person staff. As TRAIL begins offering member services, we ask for your patience, understanding, and constructive feedback as we work through the inevitable bumps in the road that are to be expected with any start-up organization.

How is TRAIL's Prescreened Service Provider list different than Angie's List or HomeAdvisor (free services)?

HomeAdvisor uses basic screening through national databases to verify licensing, confirm business is in good standing through state business filings, and identifies SSN verification for owners, as well as a basic criminal record and sex offender check for business owners.

Any company can join Angie's List – it's up to the consumer to read through the reviews to make a judgment.

TRAIL goes several steps further to ensure that our list offers greater value to our members. Our service provider list includes LOCAL businesses, most of which were referred to us personally – our volunteers and members have had great experiences with these companies. These providers proudly support the mission of TRAIL and the important role we play in the community. All of our service providers carry insurance and licensure. TRAIL employees and volunteers have spoken to at least three local references willing to vouch for the company. The business owner has also signed a privacy agreement and waiver of liability. Details about each company are available through our Executive Director or chair of the Vendor Committee.

Hey, I hear TRAIL is accepting members now! Where do I sign up?

Yes, it's true -- we're open for business, which is an exciting milestone for us. If you want to sign up for membership, it's easy to do online through our website, or you can call or email the TRAIL office and get started that way. *[Hand out TRAIL volunteer business card, which includes contact info.]* Just a heads-up, though, that we're not aggressively promoting membership just yet. We want to take it slow during these first few months, especially when it comes to Full Members, so we can make sure we have enough volunteers on hand to meet their needs. That said, if you're interested in joining up and promise to be patient with us while we work out the kinks, we'd love to have you on board. Thanks for asking!

## **TRAIL POLICIES AND PROCEDURES**

### *Attendance Policy*

If you know ahead of time that you will be absent or late, provide reasonable advance notice to the Executive Director. If a volunteer fails to show up for the scheduled shift without notice for three shifts, he or she will be considered to have abandoned his or her position and voluntarily resigned from the position.

### *Personal Appearance*

Your personal appearance reflects on TRAIL's reputation and integrity. All employees are required to report to work neatly groomed and dressed. You are expected to maintain personal hygiene habits that are generally accepted in the community, i.e. clean clothing, good grooming and personal hygiene, and appropriate social behavior.

If you come to work inappropriately dressed, you will be asked to go home and return to work dressed appropriately. If you have any questions regarding the dress code or dress code accommodations, please contact your supervisor.

### *Problem-Solving Procedure*

We strive to provide a comfortable, productive, legal, and ethical working environment. TRAIL wants you to bring any problems, concerns, or grievances you have about the work place to the attention of your supervisor. To help manage conflict resolution we have instituted the following problem solving procedure:

If you believe there is inappropriate conduct or activity on the part of TRAIL, management, its employees, members, volunteers, vendors, or any other persons or entities related to TRAIL, bring your concerns to the attention of the Executive Director. Most problems can be resolved informally through dialogue between you and your supervisor. If you have discussed this matter with your supervisor and do not believe you have received a sufficient response, or if you believe your supervisor is the source of the problem, we request you present your concerns to the Board Chair, the Board Past Chair, or the Board Chair Elect. Please describe what the problem is, the persons involved in the problem, efforts you have made to resolve the problem, and any suggested solution you may have.

### *Member and Visitor Relations*

We strive to provide the best services possible to our members. You are expected to treat every member, volunteer, or visitor with the utmost respect and courtesy during your working time. You should never argue or act in a disrespectful manner towards any of these individuals during your working time. If you are having problems with a member, volunteer, vendor or visitor, please notify your supervisor. If a member, volunteer, vendor or visitor voices a suggestion,

complaint, or concern regarding our services, please inform your supervisor. Lastly, please make every effort to be prompt in following up on member, volunteer, or visitor orders or questions.

### *Code of Ethics*

TRAIL of Johnson County will provide its services honestly and ethically. We strive to improve the quality of our operations and will maintain a reputation for honesty, fairness, respect, responsibility, integrity, trust, and sound judgment. Our employees and volunteers are expected to adhere to high standards of professional and personal integrity as a representation of our practices.

We expect that directors and employees will not knowingly misrepresent TRAIL and will not speak on behalf of the organization unless specifically authorized. The confidentiality of proprietary information and other information (i.e. financial and donor records/reports, member and volunteer lists, member and volunteer records and etc.) is to be treated with discretion and only be disseminated on a need-to-know basis (see policies relating to privacy and confidentiality).

Violation of the Code of Ethics can result in termination of volunteering arrangement.

### *Conflicts of Interest*

TRAIL of Johnson County is concerned with conflicts of interest that create actual or potential work related concerns, especially in the areas of confidentiality, member and volunteer relations, safety, and security. The employee must disclose to their supervisor any actual or potential conflict of interest between them and a supplier, distributor, or contractor to TRAIL. If an actual or potential conflict of interest is determined to exist, TRAIL will take such steps as it deems necessary to reduce or eliminate the conflict. Please refer to the Conflict of Interest Policy in the TRAIL bylaws for details.

### *Standards of Conduct*

TRAIL wishes to create a work environment that promotes job satisfaction, respect, responsibility, integrity, and value for all of our employees, members, volunteers, and other stakeholders. Every employee has a shared responsibility toward improving the quality of our work environment. By deciding to volunteer at TRAIL, you agree to follow the organization's rules.

Examples of inappropriate conduct include:

- Violation of the policies and procedures set forth in this Handbook
- Possessing, using, distributing, selling, or negotiating the sale of illegal drugs or other controlled substances

- Being under the influence of alcohol during working hours on TRAIL property or on organizational responsibilities
- Inaccurate reporting of the hours worked by you or any other employee
- Providing knowingly inaccurate, incomplete or misleading information when speaking on behalf of TRAIL or in the preparation of any employment related documents including, but not limited to, job applications, personnel files, employment review documents, intra-organization communication or expense records
- Taking or destroying TRAIL property
- Possession of potentially hazardous or dangerous property [where not permitted] such as firearms, weapons, chemicals, etc., without prior authorization
- Fighting with, or harassment (as defined in policies) of, any fellow employee, member, volunteer, or vendor
- Disclosure of proprietary and confidential information of TRAIL or its members, volunteers, and vendors
- Refusal or failure to follow directions or to perform a requested or required job task
- Refusal or failure to follow safety rules and procedures
- Excessive tardiness or absences
- Smoking in non-designated areas
- Failure to dress appropriately for work, as described in this handbook
- Use of obscene or harassing (as defined by our EEO policies) language in the workplace
- Outside employment which interferes with your ability to perform your job at TRAIL
- Gambling on TRAIL premises
- Lending keys or keycards to TRAIL premises to unauthorized persons

Nothing in this policy is intended to limit employee rights under the National Labor Relations Act.

#### *Drugs and Alcohol Policy*

TRAIL of Johnson County considers drug and alcohol abuse a serious matter that will not be tolerated. TRAIL prohibits employees from using, selling, possessing, or being under the influence of illegal drugs, alcohol, or controlled substance or prescription drug not medically authorized while at their job, on TRAIL property, or while on work time.

It is TRAIL policy that:

1. Employees shall not report to work under the influence of alcohol, illegal drugs, or any controlled substance or prescription drug not medically authorized.
2. Employees shall not possess or use alcohol, illegal drugs, or any controlled substance or prescription drug not medically authorized while on TRAIL property or on TRAIL business.



TRAIL also cautions against use of prescribed or over-the-counter medication which can affect an employee's ability to perform his or her job safely or the use of prescribed or over-the-counter medication in a manner violating the recommended dosage or instructions from the doctor. Employees must have a valid prescription for any prescription medication used by employees while working for TRAIL. Please inform management prior to working under the influence of a prescribed or over-the-counter medication that may affect your ability to perform your job safely. If TRAIL determines that the prescribed or over-the-counter medication does not pose a safety risk, you will be allowed to work. Failure to comply with these guidelines concerning prescription or over-the-counter medication may result in disciplinary action, up to and including termination of your volunteer position.

If you have any questions, you may contact your supervisor or a member of the Executive Committee.

#### *Nonsmoking Policy*

TRAIL of Johnson County is concerned about the effect that smoking and second hand smoke inhalation can have on its employees and clients. Smoking in the office and restrooms is prohibited.

#### *Security*

Every employee is responsible for helping to preserve a secure work environment. Upon leaving work, lock desks, cabinets, and doors protecting valuable or sensitive material in your work area and report any lost or stolen keys, passes, or other similar devices immediately. You should refrain from discussing with nonemployees specifics regarding security systems, alarms, passwords, etc.

Please immediately advise your supervisor of any known or potential security risks and/or suspicious conduct of employees, members, volunteers, or guests.

#### *Privacy Policy*

TRAIL recognizes and respects the privacy interests of its members, volunteers, donors, and others covered by this privacy policy. The policy reflects our core principles of respect for privacy and limited disclosure of personal information. We collect information only by lawful and fair means. When appropriate, we collect personal information directly from the data subject or with the knowledge and consent of the data subject. We do not sell, rent, exchange, or share with third parties personal information about members, volunteers, vendors, or donors for use in marketing or solicitations of any kind. We use and disclose information only as described in this policy. We provide access and correction rights. We maintain reasonable measures and safeguards to protect personal information.

### *Employee Privacy and Right to Inspect*

TRAIL property, including but not limited to, phones, computers, tablets, desks, work place areas, or vehicles, remains under the control of TRAIL and is subject to inspection at any time, without notice to the employee, and without the employee's presence. Volunteers should have no expectation of privacy with any of these areas or devices. We assume no responsibility for the loss of, or damage to, any volunteer property maintained on TRAIL premises including that kept in desks.

### *Voicemail, Email, and Internet Policy*

This Voicemail/Email/Internet Policy is intended to provide employees and volunteers with the guidelines associated with the use of the voicemail/email/Internet system (the system). This policy applies to all employees or associates, and any others accessing and/or using TRAIL's system through onsite or remote terminals.

- The system and all data transmitted or received through the system are the exclusive property of TRAIL. No individual should have any expectation of privacy in any communication over this system. Any individual permitted to have access to the system will be given a voicemail, email and/or Internet address and/or access code, and will have use of the system, consistent with this policy.
- TRAIL reserves the right to monitor, intercept, and/or review all data transmitted, received, or downloaded over the system. Any individual who is given access to the system is hereby given notice that TRAIL will exercise this right periodically, without prior notice and without the prior consent of the employee.
- TRAIL's interests in monitoring and intercepting data include, but are not limited to: protection of proprietary and confidential information (i.e. financial records/reports, member and volunteer lists and personal information, etc.); managing the use of the computer system; and/or assisting the employee in the management of electronic data during periods of absence. No individual should interpret the use of password protection as creating a right or expectation of privacy. In order to protect everyone involved, no one can have a right or expectation of privacy with regards to the receipt, transmission or storage of data on the TRAIL Voicemail/Email/Internet system.

Any employee who violates the policies in this Handbook will be subject to corrective action, up to and including termination of employment. If necessary, TRAIL will also advise law enforcement officials of any illegal conduct.

### *Social Media Guidelines*

TRAIL cannot mandate respectful and courteous activity by employees and volunteers on social media during nonworking time. However, everyone should be aware of the negative impact comments of this nature can have on the workplace and relationships with others. In addition,

please keep in mind that you may be more likely to resolve work-related disputes by speaking directly with your co-workers or supervisor, or by utilizing our Open Door Policy than by posting complaints to a social media outlet. Nevertheless, if you decide to post complaints or criticism, avoid using statements, photographs, video, or audio that reasonably could be viewed as unlawful, slanderous, threatening, or that might constitute unlawful harassment (as defined by our EEO policies). Examples of such conduct might include defamatory or slanderous posts meant to harm someone's reputation or posts that could contribute to a hostile work environment on the basis of race, sex, disability, age, national origin, religion, veteran status, or any other status or class protected by law or TRAIL policy.

When posting information:

- Maintain the confidentiality of TRAIL-related information (i.e. financial records/reports, plans, member, volunteer and donor lists and personal information, employee information, and etc.).
- Do not create a link from your blog, website, or other social networking site to the TRAIL website that identifies you as speaking on behalf of TRAIL, unless the Board has authorized you to do so.
- Except in the case of TRAIL-related and authorized postings, never represent yourself as a spokesperson for TRAIL. If TRAIL is a subject of the content you are creating on your personal website, blog, or other site, do not represent yourself as speaking on TRAIL's behalf unless you have been authorized to do so.
- Respect copyright and similar laws and use protected information in compliance with applicable legal standards.

### *Media Contacts*

All media inquiries for official responses should be directed to the Executive Director or to the Board Chair.

### *General Safety Policy*

It is the responsibility of every employee to maintain a healthy and safe work environment. Please report all safety hazards and occupational illnesses or injuries to your supervisor immediately and complete an occupational illness or injury form as needed. Failure to follow health and safety rules can result in removal from volunteer position.

### *Policy Against Violence*

The safety and security of our employees, volunteers, members, vendors, and the general public is of essential importance. Threats or acts of violence made by an employee against another person's life, health, well-being, family, or property will not be tolerated. Any act of

intimidation, threat of violence, or act of violence committed against any person on TRAIL property is prohibited. The following definitions apply:

- Intimidation: A physical or verbal act toward another person, the result of which causes that person to reasonably fear for his or her safety or the safety of others.
- Threat of violence: A physical or verbal act that threatens bodily harm to another person or damage to the property of another.
- Act of violence: A physical act, whether or not it causes actual bodily harm to another person or damage to the property of another.

No person shall possess or have control of any firearm, deadly weapon, or prohibited knife, as legally defined, while on TRAIL property, except as required in the lawful course of business or as authorized by state law.

The following are prohibited:

1. Any act or threat of violence made by an employee against another person's life, health, well-being, family, or property.
2. Any act or threat of violence, which endangers the safety of employees, residents, tenants, vendors, contractors, or the general public.
3. Any act or threat of violence made directly or indirectly by words, gestures, symbols, or email.
4. Use or possession of a weapon on premises managed by TRAIL as permitted by state law.

It is a requirement that employees report to their supervisor any behavior that compromises the organization's ability to maintain a safe work environment. All reports will be investigated immediately and kept confidential, except where there is a legitimate need to know.

Employees who violate this policy may be subject to criminal charges as well as discipline up to and including immediate termination of employment.