



# **TRAIL\* of Johnson County**

## **Handbook for Members and Volunteers**

*\*Tools and Resources for Active Independent Living*

**TRAIL of Johnson County / 28 South Linn Street, Room 201 / Iowa City, IA 52240**

**(319) 800-9003 / [www.trailofjohnsoncounty.org](http://www.trailofjohnsoncounty.org)**

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## Welcome to TRAIL!

We are pleased you have decided to join this nonprofit organization, founded to give older residents of Johnson County both the practical means and the confidence to live safely and comfortably in their own homes throughout their lives. Our goal 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 member requests.

TRAIL was organized 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 communities 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 community has been established in Johnson County. TRAIL opened its doors to membership in April 2017.

***Our mission is to help older residents live and age safely and comfortably in their own homes by providing access to essential services and socializing opportunities.***

TRAIL of Johnson County is committed to:

- Respect for others, regardless of age or circumstance
- Integrity in the conduct of all TRAIL activities
- Transparency in our business decisions and financial transactions
- Sustainability for our organization and the Earth we share
- Collaboration with individuals and groups that advance our mission

To encourage healthy communities throughout Johnson County, we support:

- Vibrant, cohesive, diverse, multigenerational neighborhoods
- Affordable housing for all
- Public-private partnerships
- Healthy lifestyles

With the assistance of volunteers and preferred service providers, TRAIL members can arrange for in-home personal care, transportation to stores and doctors' appointment, and home maintenance and repair. In addition, members can choose from a monthly list of events, activities, and educational programs that TRAIL sponsors or recommends.

TRAIL serves an optimistic and resourceful constituency of residents determined to take charge of their own lives and find creative ways to live them fully and productively. By creating social networks and providing services that respond to current needs, we seek to build a vital organization for the long term, and ensure that our members have access to the care coordination and community support they are likely to need if and when critical care becomes necessary.

In addition, TRAIL works in cooperation with other local senior-related agencies and organizations – such as the Iowa City-Johnson County Senior Center, Elder Services, Heritage Agency on Aging, and Johnson County Livable Community – to coordinate and cross-promote our various services. TRAIL seeks to maximize the resources available to seniors, and to partner with others in increasing the age-friendly aspects of our community.

Our Volunteer Program is vital to the success of TRAIL. Both members and non-members find volunteering to be a rewarding way to meet new people and make a contribution to the community.

## Becoming a TRAIL Member

TRAIL is open to older residents of Johnson County and seeks members from every race, gender, sexual orientation, and cultural group that makes up our diverse community.

TRAIL offers two levels of annual membership and associated benefits and fees.

### Full Membership

Full Membership is for individuals or households interested in more frequent and varied forms of assistance; services and benefits include:

- Volunteer assistance to meet needs such as daily check-in, transportation, light handy-person assistance, home technology help, accompanying members to medical appointments, and house checks when members are away from home
- Access to prescreened professional service providers, such as plumbers or general contractors, to address needs beyond the capacity of volunteers; these providers are screened by TRAIL for 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
- Monthly TRAIL newsletter

### Affiliate Membership

Affiliate Membership is for individuals or couples requiring fewer services at this stage in their lives. Benefits are similar to those described in the Full Membership column above, but do not include TRAIL volunteer services. Affiliate benefits include:

- Access to prescreened professional service providers (see description above)
- Participation in social activities (see description above)
- Monthly TRAIL newsletter

### Refund Policy

Membership fees are not refundable, except when a member or member household moves out of TRAIL's service area; in that circumstance, fees paid for remaining months (after member has moved) will be refunded.

Upon the death of one member of a household membership, the surviving spouse/partner will have the option of either (a) applying the prorated difference between a household membership and a single membership to a single membership renewal for the remaining months after the death occurred, or (b) asking that the prorated difference be refunded.

Affiliate memberships are non-refundable. Affiliate Members who become Full Members may choose to have their Full Membership renew annually in the same month they joined as an Affiliate Member by paying only for those months remaining until the renewal date.

## Supported Memberships

Supported Full Memberships are available for qualified individuals. We strongly believe in the importance of remaining healthy and independent in the home of one's choice, *regardless of income*. For many older adults, aging presents risks that can be lowered or eliminated through membership in TRAIL. 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. If you believe the membership fee calculated is a stretch for your budget, please discuss that with the Executive Director. 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 at 319-800-9003, or email us at [info@trailofjohnsoncounty.org](mailto:info@trailofjohnsoncounty.org).

## How to Request TRAIL Services

Our Executive Director and/or other TRAIL staff and volunteer Member Support Specialists staff the TRAIL office and handle all member-service requests. 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)

**As a courtesy to our volunteers, please try to make volunteer service requests one week in advance, if possible.** This advance notice will help us find the best volunteer for the job. Requests made outside of office hours will be addressed on the next work day. Exceptions can be made for urgent requests. In the event of a non-life threatening emergency, please call the Johnson County Crisis Center 24-hour Crisis Line at 319-351-0140.

**The TRAIL office will not be open and staff will not be available on City holidays.** These holidays will be posted on the TRAIL calendar. Should you need assistance during a holiday, we recommend you contact the Johnson County Crisis Center.

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).

## **TRAIL Volunteer Services**

### **Medical Advocacy**

TRAIL's Medical Advocacy Program pairs a specially trained volunteer and a TRAIL member to form a supportive relationship to provide transportation to and from medical appointments, a second set of ears for questions and note-taking, and gentle guidance about follow-up tasks.

### **Rise and Shine Program**

Rise and Shine is for members who want to connect with 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.

### **In-Home Support**

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, minor household chores and simple repairs, meal preparation, mailing packages, shopping for groceries, running errands, watching your home while you are away, or going for a walk with a member.

### **Outdoor Home Services**

Volunteers can help with outdoor tasks such as landscaping, gardening, and weeding.

### **Technology**

Volunteers can provide assistance to members with technical equipment that may include computers, TV and other digital device hook-up, phones, or social media support.

### **Transportation**

Volunteer drivers provide door-to-door transportation and often door-through-door transportation. Drivers can provide transportation for regularly scheduled trips and periodic trips. When appropriate, the volunteer driver will assist the member to and from/through the front door of his or her home, and help carry packages.

## TRAIL Non-Response Policy

### Purpose:

The purpose of this policy is to specify TRAIL's actions when a volunteer arrives for an arranged Full member service request and the member does not respond, either by answering the door or the phone.

### Procedures:

1. TRAIL will handle non-response situations by completing the following steps:
  - If there is no answer at the door after the initial attempts, the volunteer will knock loudly and ring the doorbell several times.
  - The volunteer will call the member home and cell phone numbers provided in the service request confirmation email.
  - The volunteer will call the TRAIL office at 319-800-9003 and convey the no-response information.
  - TRAIL office will attempt to locate the member during office hours (M-F, 9:00 am – 1:00 pm) using the Non-Response Procedure Release completed and signed by the member, which may include:
    - Calling two emergency contacts
    - Calling a neighbor with keys to the home; TRAIL volunteers will not enter the home unless accompanied by the neighbor
    - Calling Johnson County Dispatch at 319-356-6800 to request a welfare check by the police department
    - Calling 911
  
2. Members participating in the Rise and Shine program may choose to have a copy of the Non-Response Procedure Release shared with the Rise and Shine volunteer. If a non-response situation occurs outside of TRAIL office hours, the volunteer may complete the steps in the non-response procedure. The volunteer must notify the TRAIL office as soon as possible.

## **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. This prescreened service provider list is available on our website by hovering over “FOR MEMBERS” and clicking on “Find a Service Contractor.” You may also call the TRAIL office to request a copy.

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.

TRAIL is not a party to service agreements between members and Prescreened Service Providers. All negotiation of services to be provided, contracts, invoices, and billing arrangements are between individual members and service providers.

TRAIL asks that members provide feedback regarding vendors. The Member Service Provider Satisfaction Survey is available on the TRAIL website in the Member Documents section. Completed surveys can be mailed to the TRAIL office or emailed to [vendors@trailofjohnsoncounty.org](mailto:vendors@trailofjohnsoncounty.org).

## **Social, Cultural, and Educational Programs**

TRAIL sponsors and recommends programs, lectures, and other events each month. Volunteers help arrange potlucks, trips to cultural attractions, theatre and movie outings, lectures and workshops, visits to restaurants, and other small-group activities based on members’ shared interests.

Members are encouraged to start their own interest groups and suggest events that may appeal to the larger membership. We ask that you contact TRAIL with your ideas.

TRAIL encourages members to carpool to events when appropriate. Members driving other members to a TRAIL-sponsored event must have completed a background check and submitted motor vehicle records (proof of driver’s license and insurance) to be covered under TRAIL’s liability insurance policy.

## **Staying in Touch**

Visit the password-protected section of our website ([www.trail.clubexpress.com](http://www.trail.clubexpress.com)) to access our Member Directory, the monthly *TRAIL Guide* newsletter, and other documents of interest. The website includes a complete calendar of events for your consideration and participation; weekly reminders can be emailed to persons who express interest in a specific event or program.

## Become a TRAIL Volunteer

TRAIL welcomes the help of volunteers of all ages and backgrounds. A number of TRAIL members are volunteers, and non-member volunteers are recruited from the community at large. Each is motivated by a desire to serve others and make a difference in our community.

TRAIL invites all residents of Johnson County who share a belief in the mission of the organization to serve as volunteers. Interested persons are encouraged to contact our office at (319) 800-9003 or email us at [info@trailofjohnsoncounty.org](mailto:info@trailofjohnsoncounty.org) for more information. All TRAIL volunteers go through an orientation. Specialized training and background checks are required for specific volunteer responsibilities.

### The Role of Volunteers

Volunteers are central to the mission of TRAIL. Many of us remember the list of tasks that our parents or grandparents had waiting when we went home for a visit: moving furniture, looking over legal documents, setting up the new computer, programming the DVD player, washing windows, cleaning out the garage, shopping for a new appliance, or providing rides to medical appointments. Any task you might have performed (or still perform) as a good son or daughter, you might perform as a good neighbor for a member of TRAIL.

TRAIL welcomes long-term volunteers for our Member Support team to respond to member inquiries and coordinate volunteer requests from our Full members. Member Support Specialists typically work four-hour shifts on a weekly basis in the TRAIL Office, located in Room 201 of the Iowa City-Johnson County Senior Center.

We also encourage TRAIL members as well as interested members of the community to volunteer for service on one of our Board committees, including Communications, Finance, Fundraising, Member Appreciation, Member Recruitment, Social and Cultural Events, Volunteers, and Vendor Services.

### Goals of the TRAIL Volunteer Program

1. To support the mission of TRAIL by providing effective and quality services to members and the organization
2. To employ a “volunteer-first” policy, seeking a qualified volunteer to fulfill a request before contacting a professional service provider
3. To nurture and build community by developing connections among members and volunteers of all ages
4. To provide opportunities for new friendships to develop among volunteers and members as they participate in social programs, share experiences, and discover mutual interests

5. To ensure volunteers have a pleasant and rewarding service experience

#### Finding the Right Match

TRAIL continually works with volunteers to match their unique skills with the evolving needs of the organization and its members. As a volunteer for TRAIL you are covered by our insurance while performing duties related to the conduct of TRAIL of Johnson County.

#### Your Volunteer Experience

Volunteers will be asked to take on assignments that coincide with their particular interests and abilities, as well as the needs of TRAIL and its members.

We want volunteering for TRAIL to be a pleasant and rewarding experience. Volunteers should feel free to accept or decline particular assignments depending upon their personal schedules and commitments. If you receive a volunteer request that you would prefer not to take on, just say no! We will thank you and find another volunteer. If you volunteer for a particular type of service and then discover that the work is not agreeable, let us know. Volunteers may serve on a regular or periodic basis.

Both members and volunteers are encouraged to provide feedback about their volunteer experience so we can improve our volunteer program as well as the member services we provide.

#### Volunteer Orientations

Orientations are scheduled throughout the year and are posted on the TRAIL calendar on the website and promoted through social media and other means. These orientations are designed to give volunteers an opportunity to meet one another, learn about the program, and ask questions.

## General Volunteer Expectations

Volunteers should adhere to the policies of the volunteer handbook. Working closely with the staff, volunteers are expected to:

- Attend orientation and training sessions
- Consult with staff before assuming new responsibilities
- Be prompt and reliable
- Notify TRAIL as soon as possible when unable to report for a scheduled assignment
- Protect confidential information
- Exercise good judgment
- Treat members and other volunteers with courtesy and respect
- Decline any gifts or tips that may be offered

*Bring your interests to TRAIL. The best volunteers are those who enjoy sharing their knowledge, skills, and abilities with others. The more we know about you, the better we will be able to find volunteer opportunities that you will enjoy.*

## Fundraising: Why TRAIL Needs Your Support

Your generous and ongoing support as a contributor will help TRAIL provide *Tools and Resources for Active Independent Living* now and in years to come. Although membership fees eventually will fund approximately half of the organization's annual expenses, TRAIL cannot sustain itself on memberships alone. In addition, through its Supported Membership program, TRAIL seeks to build a community of members that reflects Johnson County's socioeconomic diversity.

TRAIL is an IRC Sec. 501(c)(3) nonprofit organization, and contributions to TRAIL are tax deductible to the extent allowed by law. We are pleased to recognize many of our start-up campaign and annual fund donors in honor rolls on the TRAIL website. Gifts of *all* sizes are welcome and appreciated. Gifts also may be made in honor or memory of others.

To make a contribution, simply visit the "Support" section of our website at <http://trailofjohnsoncounty.org/support> to make a secure gift online. Or you may send a check, payable to TRAIL of Johnson County, to TRAIL at 28 South Linn Street, Room 201, Iowa City, IA 52240.

TRAIL acknowledges all financial contributions with a letter of thanks that may be used for tax purposes. Membership fees are not tax-deductible because services are provided in return for payment.

## Organization and Management

TRAIL is a community-based nonprofit corporation operating under the general management of a Board of Directors, which makes policy, hires the Executive Director, and is responsible for fulfilling the mission of the organization.

### Board of Directors

The Board manages the affairs of TRAIL. The Board may authorize one or more officers, agents or employees to act for TRAIL. Such delegated authority may be general or confined to a specific instance and purpose. For a list of current TRAIL board members and officers, visit our website.

### Board Committees

The Board of Directors is committed to carrying out its work through a committee structure, and may create committees as needed to conduct the business of the organization. For example, committees are established to research issues, implement board policies and mandates, and develop new policies. In addition to the Executive Committee described below, board committees include Communications, Finance, Fundraising, Member Appreciation, Member Recruitment, Social and Cultural Events, Volunteers, and Vendor Services.

The Executive Committee includes officers of the Board and is responsible for overseeing and carrying out the business of TRAIL. The Executive Director serves as an ex officio, non-voting member of the Executive Committee. The TRAIL Bylaws include details regarding Executive Committee responsibilities and are available in the Member Documents section of our password-protected website ([www.trail.clubexpress.com](http://www.trail.clubexpress.com)).

### 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 plays a key role in assuring the satisfaction of current members and recruiting new members; the ED also is involved in 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.

### 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 individuals or with their knowledge and consent. 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.

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