



**Jewish Family Service**  
of MetroWest New Jersey

# Volunteer Handbook



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## **Introduction**

Jewish Family Service of MetroWest New Jersey (JFSMW) has been helping families and people of all ages and backgrounds manage life's challenges since 1861. We serve every member of our diverse community on a non-discriminatory basis in Essex, Morris, Sussex, and North Union counties. Time-honored values of empathy, professionalism, and confidentiality are the hallmark of JFSMW, while our up-to-date treatment modalities and nimble response to community need have distinguished JFS as a premier family service agency. JFSMW helps families and individuals maintain emotional and physical well-being, economic self-sufficiency, dignity, and independence.

At JFSMW, the Maxine Myers JFSMW Volunteer Services Department offers a wide array of meaningful volunteer opportunities. Our volunteer staff will match your interests and talents to community needs to ensure a gratifying experience. We have adult volunteer opportunities, Rachel Coalition volunteer possibilities, mitzvah projects, and the RSVP Center of Essex & Hudson Counties, which is a comprehensive community service organization catering to individuals 55 and over.

## **Mission and Vision**

Guided by the wisdom and values of our tradition of respect for all people, JFSMW provides innovative, compassionate, and outstanding social services to enhance the independence and well-being of individuals and families throughout all stages of life.

Jewish Family Service of MetroWest aims to be the premier agency within the MetroWest New Jersey area providing the social services and mental health needs of the greater community with unparalleled professionalism, humanity, and respect for all who seek its support.

## **Volunteering for JFSMW**

Volunteers choose how, where, and how often they want to serve, with commitments starting at one hour a week. Volunteers make new friends, learn new skills, and bring joy to our clients. JFSMW honors the commitment and hard work of its volunteers with yearly Volunteer Recognition Events as well as additional recognition and awards throughout the year. JFSMW provides all volunteers with accident, personal liability, and excess automobile insurance coverage to protect them while they are serving our community.

Volunteers do not receive monetary incentives. JFSMW will not discriminate against volunteers or in the operation of its program on the basis of race; color; national origin, including limited English proficiency; sex; age; political affiliation; sexual orientation, gender identity or gender expression; religion; or on the basis of disability, if the volunteer is a qualified individual with a disability. Accommodations will also be made for volunteers with disabilities when possible.

## **Volunteer Positions**

### **Money Management**

Money Management volunteers are matched with a homebound older adult in Essex County to visit once a week in their home. Volunteers assist clients with reading mail, filing papers, and paying bills enabling seniors to live independently in their own homes. Volunteers create a budget and track expenses with the client. This program helps ensure that aging residents do not end up in nursing homes or other long term care facilities prematurely.

Volunteers must submit to a background check. The program commitment is 1 hour once a week and the schedule is flexible. Volunteers are expected to document each time they meet with a client and submit this documentation to the program coordinator monthly. Documentation of the visit includes a written budget, a list of any checks written out or expenses paid for the client, and a timesheet signed by the client.

### **Friendly Visiting**

Friendly Visitors are matched with a homebound older adult to meet with in their home weekly. Volunteers provide conversation, companionship, and socialization opportunities.

Volunteers must submit to a background check. The program commitment is 1 hour once a week and the schedule of meetings is flexible. Volunteers are expected to report their hours monthly through the JFS Volunteer Tracking system and submit an update of the visit to the program coordinator online.

### **Tessie's Touch**

Tessie's Touch brings joy & connection to isolated older adults by matching them with a caring volunteer to do activities and excursions within the community. Tessie's Touch is an extension of our traditional Friendly Visiting program and allows us to go above and beyond for our seniors.

Each senior is paired one-on-one with a volunteer to facilitate a deeper connection through shared experiences and activities. JFS Staff will work with the pair to find an activity that brings them joy, such as a trip to a botanical garden, attending a show or movie they had been looking forward to seeing, or sharing a meal at a local restaurant. Tessie's Touch will cover the cost of the activities and transportation.

Volunteers must submit to a background check. The program commitment is 1 hour once a week and the schedule of meetings is flexible. Volunteers are expected to report their hours monthly through the JFS Volunteer Tracking system and submit an update of the visit to the program coordinator online.

### **Reading Buddies**

Reading Buddies engages older adult volunteers in promoting childhood literacy in public schools. Volunteers age 55+ read to the same small group of students each week throughout the school year using a read-aloud format that supplements the school's regular reading curriculum. Reading Buddies is a one-of-a-kind program that uses volunteers to support children grades k-2, as well as educators in the classroom.

Volunteers must complete a background check and are asked to commit to a full school year. The program is 1-1.5 hours once a week. Training and books are provided. Substitute reader positions are available for those who cannot commit to weekly sessions.

Reading Buddies is run through RSVP, an AmeriCorps Seniors program, and only open to volunteers ages 55+.

### **Listen to Children**

The Listen to Children program pairs a warm, accepting older adult volunteer with a school-aged child on a one-to-one basis. The Child-Listener relationship allows a child to share conversations, joys, experiences, and even concerns. Meeting with their Listener allows children to gain important cross-generational perspectives. Listener volunteers meet with a child on the same day and time weekly, usually during the student's lunch hour or recess, during the school calendar.

The volunteer is not a tutor or therapist. The Listener volunteer lends a non-judgmental ear to individual students who benefit from the special time and attention afforded by this relationship. By encouraging students to express their feelings and identify solutions to problems, Listener volunteers help students meet the challenges of growing up in today's world.

Listener volunteers receive training, ongoing supervision, and support. Educational in-services for listeners are held bi-monthly with different speakers in the community. Volunteers must complete a background check and are asked to commit to a full school year. The program runs 45 minutes once a week. Volunteers are expected to report their hours monthly through the JFS Volunteer Tracking system.

Listen to Children is run through RSVP, an AmeriCorps Seniors program, and only open to volunteers ages 55+.

### **Medicare Counseling (SHIP)**

The State Health Insurance Assistance Program (SHIP) provides free help to Essex County Medicare beneficiaries who have problems with or questions about their health insurance. SHIP is a statewide program administered in Essex County by JFS MetroWest and RSVP. It is funded by the New Jersey Department of Human Services with financial assistance through a grant from the U.S. Administration for Community Living.

Medicare beneficiaries frequently have questions about benefits, claims, and supplement policies such as Medigap and Medicare Advantage plans. Volunteer counselors, trained in areas of health insurance coverage and benefits that affect Medicare beneficiaries, provide information and assistance for dealing with claims and in evaluating health insurance options. Counselors also help low-income Medicare beneficiaries apply for Extra Help, prescription assistance, and Low-Income Subsidy programs.

Volunteer counselors do not provide legal advice, sell, recommend, or endorse any specific insurance product, agent, insurance company, or plan. They provide information and assistance so that Medicare beneficiaries can make their own decisions. Counseling is free of charge. Counselors are assigned to easy to access community sites, such as libraries and community centers throughout the county.

SHIP Counselors must commit to a background check, a 40-hour training, and a minimum of 1 year of service. Volunteers typically serve 2-4 hours a week but are busiest during Medicare Open Enrollment (Oct 7 – Dec 15). Essex County SHIP is run through RSVP, an AmeriCorps Seniors program, and only open to volunteers ages 55+.

### **Responding to Community Needs**

As needs arise, JFSMW responds quickly with ways for volunteers to support the communities most vulnerable members. During the COVID-19 pandemic, JFSMW organized two core programs – Shop and Drop and Meal Delivery – to ensure that clients had access to fresh groceries and hot meals. For the most up-to-date information on current needs, check our website at [www.jfsmetrowest.org/volunteer](http://www.jfsmetrowest.org/volunteer).

### **RSVP Center of Essex & Hudson Counties**

RSVP is a federally funded AmeriCorps Seniors program sponsored by JFSMW in Essex and Hudson Counties. In addition to serving in programs at JFSMW, volunteers ages 55 and older can be matched with non-profits, hospitals, and other public agencies across Essex and Hudson Counties. Through these “Volunteer Stations”, RSVP Volunteers can participate in a number of activities including visiting homebound seniors, helping lift families out of poverty, tutoring or mentoring students, teaching English as a second language, community gardening, etc. For a full listing, visit our website at [www.jfsmetrowest.org/volunteer](http://www.jfsmetrowest.org/volunteer).

### **Volunteer Services Staff**

Stephanie Grove  
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## Reporting Volunteer Hours

As part of the local, state, and federal funding that support our programs, **volunteers must report their hours on a monthly basis**. We use this data to gauge the success of our program and it is essential to our funding.

The majority of volunteers will report their hours monthly through OnCorps. Volunteers serving in our in-home programs such as Shop and Drop or Tessie's Touch may be asked to log each visit individually in our app, Mon Ami.

**Using OnCorps:** Volunteers can submit their hours online by going to <https://ifs.oncorpssenior.com/> and logging in with username and password. Your username is the email address you signed up to volunteer with. Your default password is *oncorpsSenior*; the first time you log in, you will be prompted to change it. If you forget your password, you can email RSVP staff to have it reset.

Once you have logged in, enter your hours for each volunteer station

1. Find **menu** on the left-hand side of the screen
  - a. At the top find **Volunteer Management**
  - b. Below that find **Hours**
    - i. Hover over **Hours**, and a tab will appear for Time Entry - Click **Time Entry**.
2. Find **Select period**. Select the month you are entering hours for e.g., May 2022
3. Find a **table** with your name at the top.
4. Click the dropdown menu for **Station/Job** to select your volunteer station. (If you have more than one volunteer station, they will all be listed - but you can only select 1 at a time.)
5. Under **Hours**, type in the number of hours you volunteered.
6. If you only volunteer at one station, you can hit **Submit**
  - a. If you volunteer *at more than 1 station* - Click the button **Add Entry** and another row will appear.
  - b. Select your next **volunteer station** and enter your **hours**.
7. When you have entered all your volunteer stations, you can hit **Submit**.

After you submit your time there is no confirmation, but your hours will be submitted. You cannot make any changes to your hours after you submit them – however, if you make a mistake, just email RSVP staff to fix it.

**Using Mon Ami:** Mon Ami is an app and phone system that makes it easy for you to connect with your client and let us know how they are doing after each visit, check in, or errand run.

Setting up your volunteer account: Once you are matched with a client, you will receive a welcome email with instructions on how to set up your Mon Ami account (double check your spam folder if you don't see the email).

1. In the email, click the link to download the Mon Ami app (if you are on your phone) or to open the web browser version.
2. Confirm that your email address is correct on the next screen, then click the "Next" button.

3. You will receive an email with a verification code (double check your spam folder if you don't see it after a minute or so). Enter the verification code into the boxes provided (you can copy and paste).
4. Set your account password. You'll need to enter it twice and it needs to be at least 12 characters long. Click the "Finish" button when you're ready. Note: Mon Ami is HIPAA compliant to protect our clients, hence the longer than normal password.
5. Once you click finish, you'll be logged into your account. Make sure to save your password somewhere safe!

Once Mon Ami is downloaded, you can open the app and log 'visits' or 'errand runs' (aka grocery shopping) for your clients. The app will prompt you to let us know how your client is and if staff needs to follow up with them. The app is great for alerting us to problems, but remember to always call us immediately in the event of an emergency.

To make your check-in calls, you'll always use the same number: (973) 221-8583. Dial from your regular phone. In turn, clients will call you back on that number. We do this so you'll never have to give out your direct number. Here's an example of how it would work for a volunteer, Julie, calling her client match, John:



### Mon Ami Frequently Asked Questions

Do I need to set up the app to use the phone system?

Nope! You can start using the phone system as soon as you are matched with a client.

How can I share feedback with the JFS MetroWest Team?

As soon as you complete a call that is longer than 2 minutes with your match, you will receive either a text message or an email asking you to share feedback on your call via a secure, online form.

Will the system be spying on my calls?

No, the content of your calls remains unmonitored and unrecorded. We will simply be tracking how often the calls occur and how long they last for our reporting purposes.

Can I leave a voicemail?

Yes! Our number behaves like a regular phone number, so you can leave/receive voicemails as usual. If you leave a voicemail, just be sure to provide (973) 221-8583 as your callback number, not your personal number.

How does the system know who to connect me to?

Mon Ami, our software partner, has a phone number on record for both volunteers and clients. As long as you call (973) 221-8583 from the phone number we have on file for you, you'll be able to connect to your matches. If you call from a different number, you'll be directed to the JFSMW office line.

Additionally, the JFSMW will periodically send volunteers surveys to measure program satisfaction. All surveys are anonymous and confidential.

### **Volunteer Insurance Program**

It doesn't happen often, but when it does, the results can be serious... a volunteer is injured or injures someone else while performing his or her duties. JFSMW is committed to protecting its volunteers. We retain a nonprofit volunteer accident plan including excess accident medical expense benefits and accidental death and dismemberment benefits. These benefits also offer excess insurance while volunteers are driving to/from and during their volunteer assignment. If you are injured or injure someone else while volunteering, contact staff immediately.

## JFSMW Volunteer Services Department Policies

### Required National Service Criminal History Checks (NSCHCs) for Employees

- I. All employees who will be receiving a salary, living allowance, stipend, education award, or are a match to a grant through a national service program (aka employees in a covered position) including but not limited to the Corporation for National & Community Service (aka AmeriCorps) are required to complete the following checks by the Senior Director of Volunteer Services or hiring authority:
  - a. Identity verification (by showing a government issued ID)
    - i. Verify the individual's identity using government issued photo identification.
    - ii. Record ID type and number or retain a photocopy of the ID in the employee's personnel file.
    - iii. Date must be recorded in the employee's personnel file.
  - b. The Dru Sjodin National Sex Offender Public Website of all states/jurisdictions
    - i. Inform the employee that employment is contingent upon eligibility determined by the results of this check.
    - ii. Enter the employee's name into the Dru Sjodin National Sex Offender Public Website at [www.NSOPW.gov](http://www.NSOPW.gov)
    - iii. Adjudicating NSOPW checks: Occasionally there are false hits on the NSOPW check especially on someone with a common name. The Senior Director of Volunteer Services or hiring authority will review all NSOPW results. Any hits will be adjudicated and recorded on the NSOPW results with adjudication reason (ex: name, age, and/or location do not match), date and initials/signature of adjudicator. If the NSOPW website check does not include every state/jurisdiction in its search, the Senior Director of Volunteer Services or hiring authority will rerun the check again before the employee's start date until all states/jurisdictions are covered. In some instances, the Senior Director of Volunteer Services or hiring authority may have to wait 24 hours or more before all states/jurisdictions are covered.
    - iv. In the case of a confirmed hit on the NSOPW check, the employee is ineligible for hire.
    - v. The NSOPW check must be completed, and the employee must be cleared before work or training can begin.
    - vi. Dates of check initiation, steps and completion must be recorded and retained with a copy of the check in employee's personnel file.
  - c. State Criminal History Check (in the state of residence and the state of service/employment)
    - i. Inform the employee that employment is contingent upon eligibility determined by the results of this check.
    - ii. Secure written authorization from the individual to perform the check.
    - iii. Document that the individual is informed that because the individual is serving in a federal grant-funded position, he or she is subject to the check.

- iv. Dates of check initiation, steps and completion must be recorded and retained with a copy of the check in employee's personnel file.
- v. As of September 24, 2018, [Pre-Approved ASP #6](#) indicates that the State of New Jersey participates in the National Fingerprint File (NFF), which is an electronic information sharing system maintained by the FBI. The NFF allows the FBI and the state to exchange criminal history records for noncriminal justice purposes authorized by Federal or State law, such as background checks for government licensing and employment. When a state participates in the NFF system, an FBI fingerprint check is duplicative of the search of a state's criminal history record repository. Therefore, an FBI fingerprint check eliminates the need for grant recipients to conduct duplicative state criminal history record checks in states that participate in the NFF system. As of September 15, 2021, the states that participate in NFF are Colorado, Connecticut, Florida, Georgia, Hawaii, Idaho, Iowa, Kansas, Maryland, Michigan, Minnesota, Missouri, Montana, North Carolina, New Jersey, New York, Ohio, Oklahoma, Oregon, Tennessee, Vermont, West Virginia, and Wyoming.
- vi. If the employee serving in a covered position is a resident of a state that does not participate in the NFF, the Senior Director of Volunteer Services or hiring authority must obtain a state check from their state of residence.
- vii. The NJ state check must be submitted to Fieldprint, the AmeriCorps approved FBI channeler.
- viii. The state check(s) must be initiated by the Senior Director of Volunteer Services or hiring authority and completed no later than the start of work.
- d. FBI Criminal History Check (using an AmeriCorps approved state source)
  - i. Inform the employee that employment is contingent upon eligibility determined by the results of this check.
  - ii. Secure written authorization from the individual to perform the check.
  - iii. Document that the individual is informed that, because the individual is serving in a grant-funded position, he or she is subject to the check.
  - iv. The FBI History Background check must be initiated by the Senior Director of Volunteer Services or hiring authority and completed no later than the start of work.
  - v. Dates of check initiation, steps and completion must be recorded and retained with a copy of the check in employee's personnel file.
  - vi. The FBI Criminal History Check must be submitted to Fieldprint, or another AmeriCorps approved channeler.
- II. Based on the results of the checks, exclusions for employment include, but are not limited to:
  - a. Anyone listed or required to be listed on a sex offender registry
  - b. Conviction of murder
  - c. Falsifying the employment application
  - d. Anyone who refuses to undergo any of the checks
- III. Employees will be provided with an opportunity to review results of their checks and correct them as needed. Employees will be given the opportunity to refute any offenses recorded on

their checks with the supervisor via phone or in person. All results will be considered and documented. Records will be maintained and kept confidential in compliance with federal law. Results can be maintained electronically or as a paper printout.

- IV. Fees for all necessary checks are covered by Jewish Family Service of MetroWest, NJ and not the individual. If necessary, employees will be reimbursed the cost of necessary check by submitting an Expense Form (located on the Common Folder) with the receipt for the check to their supervisor.
- V. Record date of hire of employee or record why the employee was not hired and date decision was made.
- VI. All NSCHC checks must be conducted again if an employee in a covered position is terminated for a period of 180 days or more.

#### Required Criminal History Checks for Volunteers

- I. JFSMW Volunteers do not receive a salary, living allowance, stipend or education award.
- II. Volunteers must complete:
  - a. The Dru Sjodin National Sex Offender Public Website (NSOPW)
    - i. Inform the volunteer that employment is contingent upon eligibility determined by the results of this check
    - ii. Enter the volunteer's name into the Dru Sjodin National Sex Offender Public Website at [www.NSOPW.gov](http://www.NSOPW.gov)
    - iii. Adjudicating NSOPW checks: Occasionally there are false hits on the NSOPW check especially on someone with a common name. The Director of Volunteer Services or RSVP Program Manager will review all NSOPW results. Any hits will be adjudicated and recorded on the NSOPW results with adjudication reason (ex: name, age, and/or location do not match), date and initials/signature of adjudicator. If the NSOPW website check does not include every state/jurisdiction in its search, the Director of Volunteer Services or RSVP Program Manager will rerun the check again before the volunteer's start date until all states/jurisdictions are covered. In some instances, the Director of Volunteer Services or RSVP Program Manager may have to wait 24 hours or more before all states/jurisdictions are covered.
  - b. Volunteers serving at JFSMW through signature programs such as, but not limited to, Reading Buddies, Listen to Children, SHIP, Money Management, and Friendly Visiting must also complete a consumer report and/or investigative consumer report as part of the volunteer background screening process by Verified Volunteers. This check includes, but is not limited to, Criminal Background Check, Social Security Number Trace, Sex Offender Search, Motor Vehicle History, and OFAC/Terrorist Watch List.
    - i. Inform the volunteer that employment is contingent upon eligibility determined by the results of this check.
    - ii. Volunteers must consent to this check in writing using the Verified Volunteer "Volunteer Consent and Disclosure" form.
    - iii. No fees will be collected from volunteers for this check.

- III. JFSMW reserves the right to determine eligibility on a case by case basis based on the confirmed results of the NSOPW and if applicable Verified Volunteers check. Volunteers will be provided with an opportunity to refute any offenses recorded on their checks via phone or in person with the Director of Volunteer Services or the RSVP Program Manager. All results will be considered and documented. Records will be maintained and kept confidential in compliance with federal law. Results can be maintained electronically or as a paper printout.

#### RSVP Volunteer Policies

- I. RSVP Center of Essex and Hudson Counties Volunteers must be 55 years of age or older, willing to serve on a regular basis without compensation, and reside in or nearby the community served by RSVP Center of Essex and Hudson Counties. Volunteers must be willing to accept instruction and supervision as required.
- II. RSVP Center of Essex and Hudson Counties Volunteers may be subject to background checks including, but not limited to, criminal history, motor vehicle history and/or Volunteers' status on the national sex offender database.
- III. Volunteers and grantee staff do not engage in, and grantee funds are not used for, any of the following activities, to the extent they are prohibited in the applicable program regulations:
  - a. Electoral activities
  - b. Voter registration
  - c. Voter transportation to polls
  - d. Efforts to influence legislation
- IV. Volunteers cannot engage in any activity which would otherwise be performed by an employed worker or which would supplant the hiring of or result in the displacement of employed workers or impair existing contracts for service.
- V. Neither the grantee nor any volunteer station requests or receives compensation from the beneficiaries of AmeriCorps Seniors volunteers.
- VI. Any volunteer station financial support of the AmeriCorps Seniors project is not a precondition for that station to obtain volunteer service.
- VII. AmeriCorps Seniors volunteers do not receive a fee for service from service recipients, their legal guardian, or members of their family, or friends.
- VIII. Grant funds are not used to finance labor or anti-labor organizations or related activity.
- IX. Project staff or volunteers do not give religious instruction, conduct worship services, or engage in proselytization as part of their duties and, if the sponsor is an organization that conducts inherently religious activities, those activities are offered separately, in time and location, from the programs or services funded under the AmeriCorps grant.
- X. The RSVP Center of Essex and Hudson Counties reserves the right to discontinue a Volunteer Station at any time even if there is an active MOU in place.
- XI. RSVP Center of Essex and Hudson Counties Volunteers are not provided monetary compensation or reimbursement by RSVP Center of Essex and Hudson Counties for their service.
- XII. RSVP Center of Essex and Hudson Counties may separate with a RSVP Center of Essex and Hudson Counties Volunteer for any cause, including, but not limited to, extensive or unauthorized absences, misconduct, and inability to perform assignments or accept supervision.

- XIII. RSVP Center of Essex and Hudson Counties Volunteers may appeal a decision of separation by contacting the RSVP Center of Essex and Hudson Counties Director. Decisions are made on a case by case basis by the RSVP Center of Essex and Hudson Counties Advisory Council.
- XIV. RSVP Center of Essex and Hudson Counties Volunteers can discontinue their service at any time and for any reason.
- XV. If a RSVP Center of Essex and Hudson Counties Volunteer changes their contact information, they must update the RSVP Center of Essex and Hudson Counties staff immediately.

#### RSVP Volunteer Station Policies

- I. Volunteer Stations are any nonprofit organizations, proprietary health care facilities or public agencies that sign a Memorandum of Understanding to accept volunteers from The RSVP Center of Essex & Hudson Counties.
- II. Volunteer Stations are required to:
  - a. Implement, provide orientation, in-service instruction, or special training of volunteers.
  - b. Interview and make final decision on assignment of volunteers.
  - c. Provide sufficient support and supervision of volunteers assigned to them.
  - d. Provide for adequate safety of volunteers.
  - e. Collect and validate appropriate reports for submission to the RSVP office.
  - f. Investigate and report any accidents and injuries involving RSVP volunteers immediately to RSVP staff. All reports will be submitted in writing.
- III. Separation from Volunteer Service: The Volunteer Station may request the removal of an RSVP volunteer at any time. The RSVP volunteer may withdraw from service at the Volunteer Station or from RSVP at any time. Discussion of individual separations will occur among RSVP staff, Volunteer Station staff, and the volunteer to clarify the reasons, resolve conflicts, or take remedial action, including placement with another Volunteer Station.
- IV. Letters of Agreement: When in-home assignments of volunteers are made, a Letter of Agreement will be signed by the parties involved. The document will authorize volunteer service in the home and identify specific volunteer activities, periods, and conditions of service. The Volunteer Station will also be responsible for conducting a safety assessment of the home before any RSVP Volunteers are placed in the home.
- V. Volunteers and grantee staff do not engage in, and grantee funds are not used for, any of the following activities, to the extent they are prohibited in the applicable program regulations:
  - a. Electoral activities
  - b. Voter registration
  - c. Voter transportation to polls,
  - d. Efforts to influence legislation
- VI. Volunteers cannot engage in any activity which would otherwise be performed by an employed worker or which would supplant the hiring of or result in the displacement of employed workers or impair existing contracts for service.
- VII. Neither the grantee nor any volunteer station requests or receives compensation from the beneficiaries of AmeriCorps Seniors volunteers.
- VIII. Any volunteer station financial support of the AmeriCorps Seniors project is not a precondition for that station to obtain volunteer service.

- IX. An AmeriCorps Seniors volunteer does not receive a fee for service from service recipients, their legal guardian, or members of their family, or friends.
- X. Grant funds are not used to finance labor or anti-labor organizations or related activity.
- XI. Project staff or volunteers do not give religious instruction, conduct worship services, or engage in proselytization as part of their duties and, if the sponsor is an organization that conducts inherently religious activities, those activities are offered separately, in time and location, from the programs or services funded under the AmeriCorps grant.
- XII. Accessibility and Reasonable Accommodation: The Volunteer Station will maintain the programs and activities to which RSVP volunteers are assigned accessible to persons with disabilities (including mobility, hearing, vision, mental, and cognitive impairments or addictions and diseases) and/or limited English language proficiency and provide reasonable accommodation to allow persons with disabilities to participate in programs and activities.
- XIII. Prohibition of Discrimination: The Volunteer Station will not discriminate against RSVP volunteers or in the operation of its program on the basis of race; color; national origin, including limited English proficiency; sex; age; political affiliation; sexual orientation, gender identity or gender expression; religion; or on the basis of disability, if the volunteer is a qualified individual with a disability.
- XIV. Specify, either by written information or verbally, that RSVP volunteers are participants in the Volunteer Station's program in all publicity featuring such volunteers, whether it be radio, TV, print or verbal presentation. Display an RSVP placard where it may be viewed by the public.

#### Record Keeping and Reporting of Hours

- I. The RSVP Center of Essex and Hudson Counties uses a software for record keeping and reporting that allows RSVP to track volunteer hours accurately and in sufficient detail to meet the requirements of the PPR, including the Progress Report Supplement (PRS).
  - a. The system is the standard used by the RSVP Center of Essex and Hudson Counties:
    - i. OnCorps Reports is used to record and track volunteers' hours
    - ii. OnCorps Reports is a web-based program that enables RSVP to create custom reports, spreadsheets, templates, mail merges, volunteer profiles, etc.
    - iii. The Senior Director of Volunteer Services and the RSVP Program Manager have access to OnCorps Reports, all data logged into it including volunteer contact information and hours logged.
    - iv. The records are maintained, stored, and retrieved from OnCorps Reports. Electronic records are stored on remote servers maintained by OnCorps Reports. Hard copies are stored in secure offices by the sponsor agency.
    - v. Hours are collected from Volunteers and Volunteer Stations via OnCorps Reports, mail, email, or by phone by allowable persons. Allowable persons are authenticated by confirming their hard copy signature, email address, phone, etc.
    - vi. OnCorps Reports enables Volunteers and Volunteer Stations to log on to a custom private account from any web enabled device and log hours.
    - vii. The links OnCorps Reports can be found on the sponsor's website at

<http://www.jfsmetrowest.org/volunteer> or by contacting RSVP staff.

- b. Reporting tools, such as the following are consistent with sponsor policy
  - i. Hard copy time sheet
  - ii. Hard copy group sign in sheet
  - iii. E-mail sent by allowable person – volunteer supervisor or volunteer
  - iv. Electronic group sign in sheet
  - v. Telephone report by volunteer supervisor or volunteer with written confirmation consistent with the sponsor policy
  - vi. Facsimile or fax
  - vii. Web-based system such as OnCorps Reports
- c. Reporting must be done by authorized persons such as the volunteer or the volunteer station supervisor.
- d. If hours are submitted via e-mail by the RSVP volunteer or the volunteer station supervisor
  - i. Sender uses an e-mail system that requires a recognizable sign-in name that is registered with the sponsor/project as the volunteer
  - ii. The e-mail is addressed to the person identified by the RSVP/sponsor policies as having the authority to accept and view e-mails reporting hours
  - iii. The system used by the e-mail recipient is capable of storing and retrieving the e-mails reporting RSVP volunteer hours

#### Additional Policies

- I. There must be written concurrence from the JFSMW Advisory Council, with notification to AmeriCorps, for any persons selected for project staff who are related by blood or marriage to other project staff, sponsor staff or officers, or members of the sponsor Board of Directors.
- II. JFSMW will not discriminate against volunteers or in the operation of its program on the basis of race; color; national origin, including limited English proficiency; sex; age; political affiliation; sexual orientation, gender identity or gender expression; religion; or on the basis of disability, if the volunteer is a qualified individual with a disability.
- III. The Senior Director of Volunteer Services and JFS Director of Operations, being responsible for the National Service Criminal History Check (NSCHC) process, must complete the AmeriCorps NSCHC eCourse annually. Documentation of course completion will be maintained on the agency's server.
- IV. Any volunteer injured while volunteering must notify JFSMW staff at the time of the incident or as soon as possible afterwards.

#### Money Management Policies

- I. Money Management is a program of JFSMW funded by Essex County Division on Aging.
- II. Money Management clients are assessed in person by the JFSMW Volunteer Services Coordinator before they are enrolled in the program and reassessed on a yearly basis to ensure they meet the requirements of the program and that the home is a safe placement for a volunteer.
- III. Assessment of Participant's Needs:

- a. In order to assess the needs of the participant, the Money Manager and Program Coordinator shall conduct an in-person meeting with the participant.
  - b. The Money Manager and Program Coordinator shall assess the participant's ability to obtain, arrange, and manage their own finances. Additionally, they shall survey what types of assistance the participant is requesting
  - c. The Program Coordinator will obtain consent for release of information as needed. The details of the verbal consent shall be documented in the participant's record. Whenever possible, written consent for release of information should be available in the participant's record.
  - d. Clients must be:
    - i. Aged 60 or older
    - ii. An Essex County resident
    - iii. Frail, vulnerable, and/or disabled
- IV. Plan Development:
- a. Based on the assessment of the participant's needs and requests, a plan shall be developed in collaboration with the participant. The plan shall include goals, back up plans, and a schedule of bills and activities to be performed by the Money Manager.
  - b. The plan shall include setting up a budget and encouraging the participant to adhere to the list of monthly expenses that they have mutually developed.
  - c. Clients maintain control over all decisions regarding their funds and financial plans. Money Managers do not make decisions for participants and do not assist with debt management or credit counseling.
  - d. The plan shall identify and authorize the type, amount, and frequency of services provided. At minimum, the Money Manager shall make contact with the participant once per month.
  - e. The plan shall be reviewed with the Program Coordinator and ultimately signed off on by the participant.
- V. Plan Implementation:
- a. Detailed logs of all services offered to the participant including but not limited to advocacy, bill paying, check writing, etc., shall be kept by the Money Manager
  - b. All services, including contacts with the participant and on the participant's behalf, shall be logged by the Money Manager and signed off on by the participant. The number of units (recorded in hours) of assistance provided at each occurrence shall be documented.
- VI. Monitoring of Services:
- a. Program Coordinators shall conduct monitoring of services at least quarterly, comparing them with the established budget, as well as bank statements and canceled checks.
  - b. Program Monitors shall conduct monitoring of records/participant accounts on an annual basis to provide third party oversight and protect the vulnerable participant from the possibility of wrongdoing. Monitoring also protects the Money Manager and the provider.
- VII. Reassessment of Plan:

- a. At a minimum, the Money Manager shall review the plan with the participant annually and review any changes with the Program Coordinator.
  - b. At this time, they will evaluate whether the Money Management services are still appropriate to continue. If the Money Management services are no longer needed, the case shall be reviewed with the Program Coordinator. Notice of case closure shall be provided in writing to the individual and documented.
  - c. Minimum requirements to be included in a Notice of Case Closure: reason for case closure; offer to assist in the future in needed; and other information appropriate to the county or participant including the creation of an active link between the participant and the Area Agency on Aging (AAA).
  - d. At any time, if the participant appears to be losing the ability to self-direct, the participant shall be referred to the local AAA for further assistance and the Program Coordinator notified.
- VIII. Structure - Money Manager, Program Coordinator, and Program Monitor shall:
- a. Provide guidance and non-intrusive bill paying assistance to maximize and prolong bill-paying capacity.
  - b. Money Managers may organize bills and prepare checks for the participant's signature. Money Managers have no authority to sign checks and may not serve as the participant's representative payee.
  - c. Contact the participant monthly at minimum.
  - d. When initially brought into the role, Money managers shall complete a three-month training period in which they shall work under the close supervision of the Program Coordinator.
  - e. Money Managers shall not solicit or accept contributions of any kind (the agency shall follow the Contribution Policy for Services), shall not attempt the sale of any merchandise or service, and shall not seek to encourage the acceptance of any particular belief or philosophy while making a visit.
  - f. Money Managers shall seek additional assistance or information when in doubt or when specialized knowledge or expertise is required.
  - g. Money Managers shall promote consumer self-reliance through connecting individuals with online banking or web-based bill paying services, whenever possible.
- IX. Program Coordinator shall at minimum:
- a. Recruit, train and place Money Managers who have been thoroughly screened (through an interview process, a criminal background check, and the survey of a minimum of three references).
  - b. The Program Coordinator will attract volunteers through outreach activities, both virtual and in person, at community events, fairs, houses of worship, libraries, and through distribution of flyers and brochures at area agencies and programs attended by potential volunteers. The Program Coordinator will also advertise for volunteers online.
  - c. Establish eligibility criteria for participants.
  - d. Oversee and monitor the participant, the Money Manager, and the services provided to ensure effectiveness, compliance with the participant's plan and best interests and made revisions as necessary.

- e. Monitor the log of bills being handled by the Money Manager on a quarterly basis at a minimum.
  - f. Program Coordinators will bring any questionable transactions to the attention of the Money Manager, the Program Monitor, and management of the service provider.
  - g. Schedule four meetings per year to update volunteers and one recognition event, such as a brunch, lunch, or virtual event and a reasonable thank you gift.
  - h. Present program updates to the JFSMW Volunteer Services Advisory Council
- X. Program Monitors:
- a. Provide third party oversight and protect vulnerable participants from the possibility of wrongdoing.
  - b. Review and monitor the documentation of the Money Manager and Program Coordinator on an annual basis at minimum.
  - c. Bring any questionable transactions to the attention of the Program Coordinator and the AAA.
- XI. Money Managers:
- a. Organize paperwork and bills
  - b. Prepare checks for clients' signatures
  - c. Set up budgets and encourage the client to adhere to list of monthly expenses that have been mutually developed
  - d. Completion of forms for obtaining and maintaining a range of government entitlements
  - e. Referrals to Program Coordinator when other services may be needed by the client such as case management, in home mental health counseling, visiting nurse services, home delivered meals or emergency cash assistance
  - f. Volunteers must complete an application, background check, and provide three references.
- XII. Volunteers will receive training and ongoing supervision from the Volunteer Services Coordinator. Volunteers will learn:
- a. Roles and responsibilities of Money Managers
  - b. Scope and limitations of volunteer services
  - c. Budgeting and bill paying procedures
  - d. Frequently referred community resources
  - e. Frequently accessed entitlements and how to complete forms
  - f. Issues and challenges confronting isolated and/or homebound elderly and/or disabled persons
  - g. How to communicate with older adults over money management issues
  - h. Reporting procedures
  - i. Emergency procedures
- XIII. Volunteers are required to attend volunteer update trainings, held quarterly. Volunteers must submit on the Money Management Monthly Reporting Form including hours served, checks written, budget to the Volunteer Services Coordinator no later than the last day of the month. Forms must be signed by the client.
- XIV. Prohibited activities include, but are not limited to:
- a. Driving the client anywhere

- b. Paying bills without the client's permission
- XV. Letters of Agreement: When in-home assignments of volunteers are made, a Letter of Agreement will be signed by the parties involved. The document will authorize volunteer service in the home and identify specific volunteer activities, periods, and conditions of service.
- XVI. Federal Assurances:
  - a. Efforts will be made to provide services to impoverished minority seniors in at least the same proportion as the population of impoverished minority seniors who are residing in the service area.
  - b. Efforts will be made to serve non-English speaking clients, specifically, the non-English-speaking populations represented in the proposed service area by recruiting and training bilingual volunteers to serve as Money Managers.
  - c. JFSMW's services are accessible to the client population and are handicap accessible. Services take place in the home, reducing barriers for clients who have mobility or other issues.