

VOLUNTEER HANDBOOK

Policies and procedures for SourcePoint volunteers.



800 Cheshire Road
Delaware, Ohio 43015

740-363-6677

MySourcePoint.org



800 Cheshire Road, Delaware, Ohio 43015
phone 740-363-6677 | fax 740-363-7588

MySourcePoint.org

Welcome from Fara Waugh

Dear Volunteer,

Congratulations! You've taken the first step! You have joined a special group of generous, caring individuals, dedicated to our mission to keep seniors in their homes as long as possible. Our volunteers are vital to the success of our organization and we rely on their generosity of time and spirit to make our organization stronger and better able to serve the older and most frail members of our community. Whether this is your first volunteer opportunity or you have been serving our community in other capacities, we are certain that your experience will be truly rewarding.

We offer a variety of volunteer opportunities and are certain that you will find at least one that interests you. Your positive attitude, desire to help others, and previous life experiences are invaluable tools as you make a difference in our community. As one of our volunteers recently said, "I never thought that I would get more than I gave as a volunteer."

This handbook will help you learn how you can best serve as a volunteer and will assist you in utilizing your talents and energy to support our efforts in making Delaware County a better place to grow older. Your assistance will complement and extend services and help us ensure our mission of care is both efficiently and effectively provided.

We extend our heartfelt thanks to all our volunteers who help us keep older adults living safely and independently in their own homes. We are certain you will find your experience to be interesting, as well as enjoyable, and that you will want to encourage others to join our team, too. Your ideas, comments, and suggestions are always welcome.

Best Wishes,

Fara Waugh
Executive Director



Set your own course to thrive after 55



Table of Contents

Introduction	7
Purpose of this Manual	7
What Volunteers Can Expect from SourcePoint	7
What SourcePoint Expects of Its Volunteers	8
SourcePoint’s Mission, Vision and Values.....	8
Volunteer Support.....	8
Dress Code.....	9
Recording Service Time	9
Volunteer Mileage.....	10
Use of Personal Vehicles	10
Volunteer Conduct	11
Children Accompanying Adult Volunteers	12
Substance Use	13
Volunteer Grievances.....	13
Ethics	14
Volunteer and Ethical Behaviors Agreement	15
Incident Reporting.....	17
Reporting Abuse, Neglect or Exploitation	18
Confidentiality.....	20
Changing Assignments	20
Ending Volunteering.....	20
Additional Information.....	20
Thanks	23
How to Call Off of Volunteer Duties.....	25
Contact Information.....	25

Introduction

SourcePoint is a primary source of professional expertise, services, and programs for Delaware County adults who want to thrive after 55. Founded in 1991, when an increase in community-based care was necessary for the growing number of seniors, programs were developed to meet those needs. Today we offer in-home care services, nutrition services, assistance with insurance questions, and resources and support for family caregivers. We also provide fun, learning and fitness for seniors in our Enrichment Center.

One of the key strengths of SourcePoint has been the many contributions of dedicated volunteers who provide SourcePoint with credibility, insight, perspective, diversity, and expertise that helps fulfill SourcePoint's mission. A volunteer at SourcePoint is anyone who, without compensation or expectation of compensation beyond optional mileage reimbursement, performs a task at the direction of, and on behalf of, SourcePoint. Volunteers are not employees of SourcePoint, but they enhance the work of our staff members and allow staff to focus on tasks and projects that will increase greater service offerings to our senior community in Delaware County.

We are so grateful for all our volunteers do.

Purpose of this Manual

This handbook serves as a reference to help you understand how SourcePoint incorporates volunteers. It explains what every volunteer needs to know to begin their volunteer assignment. It will answer questions volunteers often ask, and demonstrates how our volunteers are integral to SourcePoint's mission.

What Volunteers Can Expect from SourcePoint

SourcePoint values its volunteers and endeavors to provide volunteers with the following:

- A. A written position description of roles and tasks.
- B. A full orientation and any additional training necessary for the volunteer role.
- C. A safe environment in which to perform the assigned role.
- D. Respect for privacy, including keeping our volunteers' personal information confidential.
- E. The ability to ask questions of, and get feedback from, an assigned Volunteer Supervisor.
- F. Optional mileage reimbursement incurred for pre-determined volunteer roles.

What SourcePoint Expects of Its Volunteers

We ask that SourcePoint volunteers:

- A. Support SourcePoint's mission.
- B. Participate in all relevant orientation and training programs.
- C. Perform the duties of the assigned role under the supervision of the assigned volunteer supervisor.
- D. Provide timely notification for absences.
- E. Understand and comply with SourcePoint's policies and procedures.
- F. Notify their volunteer supervisor of any potentially hazardous situations, accidents or incidents.
- G. Interact appropriately with all staff, clients, members and the public while volunteering.
- H. Safely use any SourcePoint property or equipment for the purpose of the assigned role, including the acceptable use of technology.
- I. Keep the lines of communication open regarding volunteer satisfaction.

SourcePoint's Mission, Vision and Values

The mission of SourcePoint is to help our community set a course to live well after 55. We envision a community where every person 55 and over is empowered to live life to the fullest.

We uphold the following values:

- **Respect:** We recognize and uphold the diversity of the community and the dignity of each person.
- **Compassion:** We care for people and their families with empathy.
- **Interdependence:** We work cooperatively in a spirit of trust and collaboration.
- **Excellence:** We strive to achieve the highest standards of performance, care, and integrity.
- **Stewardship:** We use resources effectively and responsibly.
- **Advocacy:** We aspire to represent the best interests of the individuals we serve.

Volunteer Support

All volunteer positions are supported by a volunteer supervisor who is a staff member. Volunteers should address their questions, opinions and concerns to their volunteer supervisor. Volunteers are always encouraged to share ideas and suggestions about program improvements.

Dress Code

For all intents and purposes, the dress code at SourcePoint is casual.

- A. Appropriate dress is expected while representing SourcePoint whether on-site or off-site.
- B. Volunteers are encouraged to wear their SourcePoint shirt.
- C. Volunteers are requested to wear their ID badges while volunteering.

Recording Service Time

Recording your donated time is an important part of volunteering. Besides being used as a tool to recognize our dedicated volunteers, this data assists SourcePoint in applying for grants and other funding opportunities.

There are two ways to record time served.

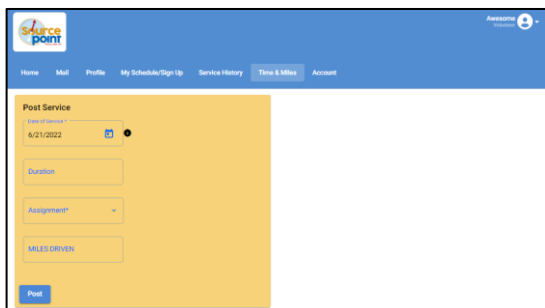
- The monitor at the volunteer kiosks includes a time-tracking module that records volunteers' service hours.



Use the number on your badge to sign in and sign out.

Click on the correct response on each screen that appears following this screen.

- VicNet is SourcePoint's online portal for volunteers who track off-site time and mileage.



Click on Volunteer Resources at the bottom of the SourcePoint website.

Use the Email address that SourcePoint has on file as the Login name.

Click on 'Need a Password' to create a password.

- Some assignments require paper timesheets. See SourcePoint's website for a sample. (See Volunteer Resources on SP website for examples – www.mysourcepoint.org).

Volunteer Mileage

Based on a volunteer's position, drivers of personal vehicles can choose to be reimbursed for the miles they drive while volunteering on behalf of SourcePoint. Options for reimbursement are 100% or 50% of miles driven, or the volunteer can choose to donate 100% of their mileage to SourcePoint.

- A. Volunteers who first report to SourcePoint before beginning their assignments, such as Meals on Wheels drivers, begin tracking time and mileage when they leave SourcePoint and end tracking time and mileage upon their return to SourcePoint.
- B. SourcePoint reimburses mileage via electronic auto-deposit on a monthly basis. Volunteers are strongly encouraged to supply banking information to accommodate this procedure.
- C. Volunteers who are reluctant to provide bank information will be mailed a mileage reimbursement check on a quarterly basis.

Use of Personal Vehicles

POLICY

This volunteer policy applies to all volunteers who drive their personal vehicles to transport clients or drive a delivery route (Medical Transportation, Ensure Deliveries and Meals on Wheels assignments).

Requirements for Volunteers who drive:

- A. Must be at least eighteen (18) years old.
- B. Must submit a **driver's license number** to the Volunteer Recruiter at the time of fingerprinting.
- C. Must provide proof of **vehicle insurance** to their Volunteer Supervisor before they may begin their driving assignment.

Required Insurance Coverage

Liability coverage -- \$100,000 per person; \$300,000 per accident

Property damage -- \$100,000; \$300,000 combined single limit.

- D. Medical Transportation drivers, because they transport clients, must give permission for an initial three-year report of their driving history from the Bureau of Motor Vehicles (BMV) and annually thereafter submit to a two-year BMV check that will be initiated by SourcePoint.
- E. Meals on Wheels and Ensure Delivery volunteers must give SourcePoint permission to request a two-year report of their driving history from the Bureau of Motor Vehicles (BMV) and thereafter every two years submit to a BMV check that will be initiated by SourcePoint.

Driving Record

- A. In the case of an accident, the volunteer's insurance is the primary insurance and SourcePoint's insurance is secondary.

- B. SourcePoint shall not be responsible for, or reimburse volunteers for, traffic violations, fines, or parking violations received while conducting SourcePoint business in their personal vehicle.
- C. While volunteering for SourcePoint, volunteers are expected to operate their personal cars in a lawful and safe manner.
- D. A driver with the following citations on his or her driving record is ineligible for SourcePoint driving assignments:
 - a. 3 speeding tickets within a 3-year period
 - b. 2 at-fault accidents within a 3-year period
 - c. A major moving violation within a 5-year period (DUI or Reckless Operation)
- E. A driver convicted of reckless operation or driving under the influence of alcohol or drugs, both of which are unlawful actions, or while driving as a SourcePoint volunteer or not, will no longer be qualified to drive on behalf of SourcePoint and will be reassigned to other volunteer duties (as agreed to by the volunteer) that do not include driving on behalf of SourcePoint.

PROCEDURE

These procedures refer to any such volunteers who drive their personal vehicles as defined in the policy above.

- A. Volunteers are required to report any suspension or revocation of the volunteer’s driver's license and any conviction of a major moving violation.
- B. A volunteer who does not report the above immediately will no longer be qualified to drive on behalf of SourcePoint and will be reassigned to other volunteer duties (as agreed to by the volunteer) that do not include driving on behalf of SourcePoint.

The following procedure refers to volunteers who drive SourcePoint vehicles on SourcePoint business.

The Human Resource Manager shall annually submit to the Bureau of Motor Vehicles (BMV) the names, license numbers, and proof of insurance for all volunteers who drive SourcePoint vehicles on SourcePoint business.

Volunteer Conduct

POLICY

SourcePoint strongly promotes an environment where conflict is resolved with mutually satisfying outcomes. Every effort should be made to resolve issues as soon as they arise. Every effort must be made to find an equitable solution and subsequent steps should only be taken when the previous steps fail.

- A. Volunteers are expected to follow rules of conduct that will protect the interest and safety of all staff, volunteers, clients, members and visitors.
- B. Volunteers shall be courteous, considerate, respectful, and prompt in working with staff members and in dealing with and serving clients, members and visitors.
- C. Volunteers shall maintain high standards of honesty, integrity, impartiality and discretion.
- D. Volunteers shall place the interests of staff, clients, members and visitors ahead of their personal interests.

- E. Volunteers shall not use, or attempt to use, their role at SourcePoint for personal gain or use confidential information for personal advantage.
- F. Volunteers whose roles require the use of technology resources, or who are given access for personal use, will adhere to SourcePoint’s policies and procedures for information technology.

PROCEDURE

Volunteers who do not adhere to SourcePoint policies and procedures or who fail to satisfactorily perform their volunteer assignment are subject to release from their assignment or reassignment to another position. Reassignment of a volunteer will occur when a volunteer is unable to continue in their current role, but is able to volunteer in another capacity. Release of a volunteer will be the last resort.

Conduct meriting immediate assignment termination

- A. There are some conduct issues for which volunteers will be suspended immediately while an investigation is carried out. These include, but are not limited to, acts that constitute gross misconduct, e.g., theft, assault, an act of violence, malicious damage, deliberate falsification of documents, harassment, and being under the influence of drugs or alcohol.
- B. Illegal or criminal acts will be reported to the police and may result in prosecution.

Children Accompanying Adult Volunteers

POLICY

There are instances when children accompany adults when the adult volunteer is serving on their volunteer assignment. The two most common reasons for children accompanying an adult volunteer are due to child care issues or the adult volunteer wants to expose the child to volunteering. This is more suitable to some assignments than to others.

- A. Assignments that are never conducive to accommodating children accompanying an adult volunteer are as follows:

Office assignments	Kitchen assistants
Gift shop assistant	Fitness desk attendant
Concierge	Aquatics desk attendant
- B. In all other areas, volunteers must secure the approval of their Volunteer Supervisor before bringing a child with them.

PROCEDURE

- A. Even if a Volunteer Supervisor grants approval for a child to accompany an adult volunteer, the approval is contingent on the following conditions:
 1. The adult provides continuous supervision
 2. The child’s behavior is not disruptive to staff, other volunteers, members or clients

3. The child's presence does not interfere with the volunteer's ability to complete their assignment
- B. In the event these conditions are not met, the Volunteer Supervisor can rescind their approval for the child to accompany the adult volunteer.

Substance Use

POLICY

Drugs, alcohol, smoking and vaping are strictly prohibited in all SourcePoint facilities, parking lots, and any other areas controlled by SourcePoint. They are also prohibited on or in clients' property or while transporting a client.

PROCEDURE

Volunteers who do not adhere to SourcePoint policies and procedures are subject to release from their assignment.

Volunteer Grievances

POLICY

- A. A dispute made by a volunteer, which involves complaints against a staff member or another volunteer or questions of policy interpretation or the application of hours and terms, shall be handled in accordance with the procedures outlined below.
- B. If the complaint is a discriminatory harassment complaint or falls under the American Disabilities Act (ADA), the complaint shall be referred to the Human Resource Manager.
- C. If a complaint is related to discrimination or discriminatory harassment, it will also be brought to the immediate attention of the CEO.
- D. There will be no negative action permitted against a volunteer for making a complaint.

PROCEDURE

The volunteer discusses the grievance with their Volunteer Supervisor and/or the Volunteer Recruiter, who shall make every reasonable effort to resolve the complaint as quickly as possible. If the volunteer is not satisfied with the response, the Volunteer Recruiter will discuss alternative volunteer opportunities with the volunteer.

Ethics

POLICY

- A. SourcePoint expects and requires of all volunteers and board members the highest standard of ethical behavior in all dealings with one another, with clients, and with members and visitors.
- B. When the nature of an ethical dilemma makes the proper course of action unclear, volunteers and board members are advised to seek advice from the management to whom they report to discuss matters that require clarification. In general, volunteers and board members are advised to err on the side of caution in handling ethical dilemmas.

PROCEDURE

Receiving Gifts

- A. Volunteers must adhere to the following guidelines regarding gifts.
 - 1. Accepting gifts that could be construed to improperly influence your work on behalf of SourcePoint is prohibited.
 - 2. It is useful to remember that appearances as well as reality are important considerations. The guiding principle in this area is to use good judgment.
 - 3. In general, gifts should not be accepted; however, in the event a gift is offered, the following examples can be used as a basis for deciding on the appropriateness of a gift.

Acceptable Gifts

- Baked goods
- Hand-crafted gifts
- Small mementos/trinkets
- Thank-you cards

Unacceptable Gifts

- Meals
- Cash
- Gift cards
- Reimbursement for gas
- Entertainment tickets
- Real estate
- Securities
- Solicited gifts

- B. When a volunteer cannot refuse to accept a gift of more than nominal value tactfully or without harming a relationship, the volunteer must promptly turn the gift over to their Volunteer Supervisor.

Giving Gifts

- A. As a general rule, volunteers should not give gifts.
- B. Upon learning of a client's needs, a volunteer should not gift the client with money, home furnishings, meals, etc., without prior approval from the SourcePoint Client Services Manager.

C. Conflicts of Interests:

1. SourcePoint and its work exist within an internal and external "community of interest" related to the delivery of effective social and health services for older adults. Particularly in a small community the potential for conflicts of interest or the appearance of conflicts of interest is significant. These conflicts of interest should be avoided and the appearance of conflicts of interest should be dealt with through open disclosure.
2. Examples of potential conflicts of interest to be avoided include, but are not limited to, the following:
 - Representing SourcePoint in dealings in which the individual has an interest.
 - Soliciting personal favors from companies, grantees, or providers with whom SourcePoint does business.
 - Selling one's services to companies with whom SourcePoint does business.
 - Influencing an employment decision involving a relative or friend.
 - Seeking to influence a grant or contract with an organization with which one has a personal relationship.
 - Promoting a business belonging to a volunteer, a volunteer's relative or a volunteer's friend.
- D. Due to the interconnectedness of SourcePoint and its many partners, if a volunteer suspects that a technical conflict or the appearance of a conflict may exist, it is important that the matter be disclosed to the Volunteer Supervisor or, in the case of board members, to the Board of Directors, and that the volunteer abstain from the formal decision-making process involving the potential conflict.

Volunteer and Ethical Behaviors Agreement

POLICY

All volunteers must read and agree to the following agreement regarding ethical behaviors.

If accepted into the volunteer program I agree to:

1. Hold as confidential all information that I may obtain directly or indirectly concerning clients and staff and not seek to obtain unnecessary confidential information from a client.
2. Become familiar with the organization's policies and procedures and uphold its philosophy and standards.
3. Donate my services to the organization without the expectation of compensation or future employment.
4. Be punctual and conscientious; conduct myself with dignity, courtesy and consideration of others; and endeavor to make my work professional in quality.
5. Maintain a well-groomed appearance during my volunteer time.
6. Attend orientation and in-service training as scheduled.
7. Seek the assistance of my Volunteer Supervisor as needed or necessary.
8. Take any problems, criticism or suggestions to my supervisor or the Volunteer Recruiter.

9. Complete volunteer hours as assigned.
10. Adhere to the volunteer policies if unable to work as scheduled.
11. Honor my commitment toward volunteer service.

As a Volunteer I will not engage in the following activities:

1. Using the client's car.
2. Consuming the client's food and drink.
3. Using the client's personal property without their consent.
4. Eating food brought to the client's house without the client's consent.
5. Using the client's telephone for personal calls.
6. Discussing the client's personal problems or religious/political beliefs.
7. Accepting gifts or tips from clients.
8. Borrowing money from or loaning money to the client.
9. Accepting or attempting to obtain money or anything of value, including gifts or tips from the client, household members and/or family members of the client.
10. Giving the client medical advice.
11. Consuming alcohol, medicine, drugs or other chemical substances not in accordance with the legal, valid, prescribed use and/or in any way that impairs me in the delivery of services to the client and/or when representing SourcePoint.
12. Engaging with the client in sexual conduct or in conduct that may reasonably be interpreted as sexual in nature, regardless of whether or not the contact is consensual.
13. Engaging in behavior that causes or may cause physical, verbal, mental or emotional distress or abuse to the client.
14. Engaging in behavior that may reasonably be interpreted as inappropriate involvement in the client's personal relationship.
15. Being designated to make decisions for the client in any capacity involving a declaration for mental health treatment, power of attorney, durable power of attorney, the client's finances or guardianship.
16. Selling or purchasing any products or personal items from the client.
17. Engaging in behavior that constitutes a conflict of interest or takes advantage of or manipulates SourcePoint approved service resulting in an intended advantage for personal gain that have detrimental results for the client, the client's family or caregiver.
18. Bringing children, pets, friends, relatives, or anyone else to the client's place of residence without prior authorization from my Volunteer Supervisor.
19. Smoking in the client's home with or without the client's permission.
20. Giving the client my home or mobile telephone number (all clients should be directed to SourcePoint).
21. Breaching the client's privacy or confidentiality of client records as outlined in HIPAA Training.

Statement of Commitment

I understand that SourcePoint reserves the right to terminate my volunteer status as a result of failure to comply with organizational policies, rules and regulations; breach of confidentiality, absences without prior notification; unsatisfactory attitude, work, or appearance; or any other circumstance which, in the judgment of my Volunteer Supervisor or the Volunteer Recruiter, would make my continued service as a volunteer contrary to the best interests of the organization. I understand that intentional or involuntary violation of confidentiality may result in termination of my service to SourcePoint.

PROCEDURE

A separate signature page will be provided at the Volunteer Orientation for the volunteer's signature.

Incident Reporting

POLICY

All events that adversely affect the physical and/or emotional health of any client or volunteer of SourcePoint or involves any damage to, or theft of, their property shall be reported to their Volunteer Supervisor. Such events may or may not be the responsibility of the volunteer making the report, but the volunteer may be the person to whom the client reported the event.

PROCEDURE

- A. If an incident is an emergency, the volunteer shall follow emergency protocol as established by SourcePoint.
- B. Onsite incidents shall be reported to the Volunteer Supervisor within 24 hours of the event. Incidents that occur off-site should be called in within 24 hours of the event. Calls can be made to (740) 363-6677 during the hours of 8:00 am - 5:00 pm Monday through Friday.
- C. The SourcePoint Incident Report shall be completed and given to the Volunteer Supervisor or the Department Manager who will forward the report to the appropriate director. Refer to the Appendix for a sample of the Incident Report.
- D. See Volunteer Policy Manual for complete instructions and examples.

Reporting Abuse, Neglect or Exploitation

POLICY

It is the policy of SourcePoint that all staff and volunteers are mandated to report any suspicion or observance of abuse, neglect or exploitation of any child, older adult, vulnerable individuals, or animals to law enforcement or the designated investigative agency. Volunteers are expected to also report any incidents or concerns to their Volunteer Supervisor.

SourcePoint follows **ORC section 5101.63 reporting abuse, neglect, or exploitation of an adult**, which means any individual having reasonable cause to believe an adult is being abused, neglected, exploited, or is in a condition that is the result of abuse, neglect, or exploitation shall immediately report such belief to the county department of jobs and family services.

SourcePoint follows **ORC section 2151.421 reporting abuse or neglect of a child**, which means any individual who knows, or has reasonable cause to suspect based on facts that would cause a reasonable person in a similar position to suspect, that a child under eighteen years of age, or a person under twenty-one years of age with a developmental disability or physical impairment, has suffered or faces a threat of suffering any physical or mental wound, injury, disability, or condition of a nature that reasonably indicates abuse or neglect of the child, shall immediately report that knowledge or reasonable cause to suspect a child is being abused or neglected, or is in a condition that is the result of abuse or neglect shall immediately report such belief to the county department of jobs and family services.

SourcePoint follows **ORC section 959.01 - 959.131 reporting abuses related to domestic animals**, which includes **ORC section 959.07 reporting a violation of a companion animal**.

PURPOSE

The purpose of this policy is to provide information, guidance, and procedures to address incidents of abuse, neglect, or exploitation, specifically to:

- A. Assist in the prevention or elimination of abuse, neglect or exploitation of vulnerable individuals.
- B. Fulfill ethical and legal responsibilities.
- C. Assist in the investigative process as necessary and permitted by law.
- D. Contribute to a collaborative and cooperative community response to the mistreatment of vulnerable individuals and animals.

PROCEDURE

Background Checks

SourcePoint is committed to providing a safe environment for staff, volunteers, clients, members and visitors, as well as maintaining compliance with all Federal, State, Local, and Funder volunteer rules. SourcePoint determines if volunteers are required to submit to a background check based on the volunteer's assignment.

Education and Acknowledgment

All volunteers receive training during their orientation process, which includes how to recognize abuse, neglect or exploitation. Volunteers are required to acknowledge in writing the completion of the training received at orientation, as well as receipt of all volunteer policies and procedures.

Reporting Procedure

Any volunteer who has reasonable cause to believe that an adult, child, or animal has been abused, neglected, or exploited or is in a condition that is the result of abuse, neglect, or exploitation shall immediately take the following steps.

For adults and children

1. Call 9-1-1 if the victim is in immediate danger.
2. Contact the Delaware County Department of Job and Family Services at 740-833-2340 or 800-899-3180.

For companion animals

1. Complete the Cruelty Complaint at the following link: <https://hsdcoh.wufoo.com/forms/zt4tba01yh8z0u/>
2. Leave a voicemail at 740-369-7387 with your name, nature of complaint, and a valid telephone number. A humane agent will return your call. Note that the humane agent may ask for a signed, written statement, if needed.
3. For stray dogs in Delaware County, contact the Delaware County Dog Warden at 740-368-1915.
4. For animal cruelty issues in the City of Delaware, contact Delaware Animal Control at 740-203-1111.
5. For animals locked in a hot car, call 9-1-1.

After contacting the appropriate agency found above, the volunteer shall:

1. Immediately advise their Volunteer Supervisor.
2. Be available for follow-up by the investigative agency.
3. Complete and turn in an "Incident Reporting Form" to the Volunteer Supervisor.

Reporting Protection

Per the ORC sections identified in 'POLICY' above, any individual who reports in good faith any incident relating to abuse, neglect or exploitation shall be immune by law from civil or criminal liability.

Volunteers who Allegedly Abuse, Neglect and/or Exploit Clients and/or Companion Animals

SourcePoint takes allegations of abuse, neglect or exploitation seriously. Once the allegation is reported we will promptly, thoroughly and impartially initiate an investigation to determine whether there is a reasonable basis to believe that abuse, neglect or exploitation has been committed. To the fullest extent possible, but consistent with our legal obligation to report suspected abuse, neglect or exploitation to appropriate authorities, we will endeavor to keep the identities of alleged victims and investigation subject confidential.

Volunteers will cooperate fully with any investigation conducted and the volunteer will be placed on leave for the duration of the investigation. If the investigation substantiates the allegation, SourcePoint will terminate their relationship with the volunteer.

Confidentiality

Volunteers are responsible for maintaining confidentiality of all privileged information to which they are exposed while serving as a volunteer, whether this information involves clients, donors, staff, other volunteers, or other persons involved with SourcePoint, all of whom trust that SourcePoint is a place where their private information does not go outside SourcePoint's walls, is not discussed in the common areas, and their information is not shared without their approval.

Changing Assignments

A volunteer may want to change to another position for many reasons. If looking for a change, contact the Volunteer Recruiter who will help you find a satisfying volunteer opportunity.

Likewise, if a staff member identifies that a volunteer is not a good fit for their volunteer position, or if the volunteer is struggling in some way in the area where they are volunteering, a discussion between the staff member and the volunteer will take place. The Volunteer Recruiter will participate in the discussion and/or decision. SourcePoint will make every effort to find an appropriate and satisfying opportunity for the volunteer.

Ending Volunteering

If you have decided to end your volunteer commitment with SourcePoint, please inform the Volunteer Recruiter. You may do this in person, by phone, or via email. A short exit interview may be conducted. All responses are confidential and are used to strengthen our volunteer program.

SourcePoint may terminate a volunteer's placement, or a volunteer may terminate his/her volunteer commitment, without cause, and with or without notice, at any time for any reason.

Situations that might warrant the termination of a volunteer:

- Acting in a disrespectful manner towards staff members, other volunteers, clients, donors or visitors.
- Theft of anything on SourcePoint premises.
- Breaching confidentiality.
- Posting negative comments or information about clients/photos of clients on social media.
- Unethical behavior.

HIPAA Information

What is HIPAA?

The **Health Insurance Portability and Accountability Act** of 1996, otherwise known as the HIPAA privacy rule is a federal regulation that protects the health information of all individuals. Most of us share personal health information with our healthcare providers and our health insurers. This rule establishes guidelines and standards for the use and disclosure of client's personal health information.

When did it take effect?

The rule was enacted on August 14, 2002, and took effect on April 14, 2003.

If I am a volunteer or student, do I need to understand and follow the HIPAA rule?

Yes, according to the definition in the HIPAA regulation text: “workforce members include employees, volunteers, trainees, and other persons whose conduct, in the performance of work for the agency, is under the direct control of the agency, regardless of whether they are paid by the agency.”

What are the benefits of HIPAA?

- Ensures that all individuals receiving healthcare have greater access to his/her own health information and medical records.
- Ensures that healthcare providers take reasonable precautions to protect personal health information by imposing restrictions on its use and disclosure.

What is a covered entity (CE)?

A covered entity is defined as a **health care provider, a health plan or a healthcare clearing house** that transmits any health information in electronic form. Attorneys, accountants, software vendors and others providing business services to covered entities are NOT considered covered entities.

What is considered Protected Health Information (PHI)?

All individually identifiable health information that is used or disclosed by a covered entity in **any form, electronic, written or oral**. This includes information relating to the past, present or future physical or mental health of an individual, provision of care to an individual, or the past, present or future payment for health care provided to an individual.

What does this mean for SourcePoint?

- All our programs are affected because we transmit electronic PHI.
- We must protect the personal health information for **all** our clients.
- We must let clients know what we are doing to protect their personal health information.

When can I use or disclose PHI?

PHI can be used for treatment, payment and healthcare operations (TPO) without a specific authorization.

- “Treatment” means the provision, coordination or management of health care and related services among health care providers.
- “Payment” means the activities of health care providers to obtain payment or be reimbursed for their services.
- “Healthcare operations” means administrative, financial, legal and quality improvement activities of a covered entity that are necessary to run its business and to support the core functions of treatment and payment.

What is the minimum necessary standard?

Volunteers are to use only the minimum amount of protected health information that is necessary to perform their jobs. SourcePoint program directors, supervisors, and coordinators will determine the amount of information that each volunteer needs access to in order to complete their job. SourcePoint will make reasonable efforts to limit the PHI used, disclosed or requested.

- *An exception to this rule is the use or disclosure of records for treatment purposes.*

What is the Notice of Use of Private Health Information?

This is the privacy notice developed by SourcePoint that describes in detail, with examples, how SourcePoint will use and disclose protected health information. This notice is available in print and on the SourcePoint website www.mysourcepoint.org and is posted at the site of service when possible.

What is a Privacy Officer and who is it at SourcePoint?

The Privacy Officer is the individual at SourcePoint who has the responsibility to interpret and implement the HIPAA regulations. The Privacy Officer is responsible for investigating any complaints of privacy violations. The SourcePoint Privacy Officer is Amelia Tucciarone. She can be reached at 740-363-6677 or by writing to her at SourcePoint, 800 Cheshire Road, Delaware, OH 43015.

What are the patient's privacy rights?

- To receive the "Notice of Use of Private Health Information "on the first date of service.
- To request restrictions on the use and disclosure of PHI.
- To obtain copies of medical records.
- To inspect and correct PHI.
- To contact the privacy officer with any concerns.

What are the duties of the SourcePoint?

- To develop privacy policies, procedures and forms.
- To educate the workforce including volunteers.
- To determine how much information each volunteer needs in order to complete his/her job.

Where can I get more information on HIPAA?

Contact the Privacy Officer, Amelia Tucciarone at 740-363-6677.

Additional Information

See the full Volunteer Policy Manual for help / additional information on the following topics:

- IT Acceptable Use Policy
- Concealed Carry
- Emergency Response Plan
- Equal Volunteer Opportunity
- Inactivation Policy
- In the Event of an Accident
- Service Event Volunteers
- Time and Mileage
- Workplace Violence
- Youth Volunteers



Thank you for choosing SourcePoint as the place where you want to volunteer your time, skills, knowledge and heart. As a SourcePoint volunteer, you are an important part of helping older members of the community improve their quality of life. This generosity defines SourcePoint's philosophy of people helping people.

How to Call Off of Volunteer Duties

When the need arises to call off from a volunteer assignment, whether for a one-time scheduling conflict or for a long period of time, the best approach is to reach out to the Volunteer Supervisor over your area of service via phone or email. Please refer to the contact list below.

Contact Information

Kilton, Denise *Volunteer Recruiter*

740-203-2368

dkilton@mysourcepoint.org

- Volunteer Recruitment

Carselle, Sara *Lead Dining Site Hostess*

740-363-6677

sara.carselle@mysourcepoint.org

- Café 55
- Kitchen Scheduler

Clark, Lisa *Meals on Wheels Supervisor*

740-203-2431

lclark@mysourcepoint.org

- [MOW](#)
- [Special Deliveries](#)

Clark, Marilyn *Membership Specialist*

740-363-6677

marilyn@mysourcepoint.org

- Gift Shop
- Concierge
- EC Activities

Fox, Brian *Caregiver Program Coordinator*

740-203-2399

bfox@mysourcepoint.org

- Caregiver Peer Leaders

Gilletly, Tiffany *Food Services Manager*

740-203-2356

tgilletly@mysourcepoint.org

- Kitchen Assistants

Homan, Mary *Community Events Specialist*

740-203-2357

mary.homan@mysourcepoint.org

- Fundraising & Special Events

Open *Administrative Specialist*

740-203-2434

ajester@mysourcepoint.org

- Mailings
- Office Assistants

Krauss, Carissa / Bean, Laura

In Home Care Volunteer Program Specialists

740-203-2414/740-203-2395

inhomecareVPS@mysourcepoint.org

- Care Packages & Birthday Deliveries
- Ensure Deliveries
- Home Helper/Chores
- Medical Transportation

Pace, Dave *Nutrition Administrative Manager*

740-203-2362

dpace@mysourcepoint.org

- Farmers' Market

Pearse, Joan *Arts & Education Manager*

740-203-2410

joan@mysourcepoint.org

- Art Assistants
- Instructors

Pritt, Charlotte *Insurance Specialist*

740-203-2407

charlotte.pritt@mysourcepoint.org

- OSHIIP

Smith, Laura *Community Engagement Manager*

740-203-2436

laura.smith@mysourcepoint.org

- Matter of Balance & Health in Action

Wright, Valarie *Wellness Manager*

740-203-2429

vwright@mysourcepoint.org

- Aquatics & Fitness Desks
- Off-site Facilitators
- Friendly Pet Visitors