



Friends of Seniors of Dutchess County Corp.








Real beauty comes with age

9 Vassar St., #24
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FRIENDS OF SENIORS CHECKLIST ACUU CONFERENCE JUNE 5, 2018

1. KEEP IT SIMPLE

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- a. Build a solid foundation. Find like-minded people who are interested in volunteer transportation for the older adult community in your county/town/region.
 - b. Come to an agreement as to what is to be accomplished with your program. What type of transportation do you want to provide? Non-emergency medical transportation? Grocery shopping? Visits to rehab centers? Social centers? Salons? Barbers? Veterinarians? Pick one or two. Make sure the program will be able to provide the service. Expand later.
 - c. Write a one-sentence mission statement, i.e. Friends of Seniors provides basic support services to the Dutchess County older adult community.
 - d. Choose a name, i.e., Friends of Seniors of Dutchess County Corp.
 - e. Develop a Board of Directors
 - f. Draft by-laws.
 - g. Get a telephone, P.O. Box, email, and a website. Go to www.freeservers.com to build your own website. Very inexpensive, not fancy, but informational and effective.
 - h. Design a brochure that you can print yourself.
 - i. Open a bank account. You need money to start, but don't focus on the money. Focus on the program and the money will come.

1. LEGAL MATTERS – NOT SO SIMPLE

- a. Hire an attorney savvy in nonprofits to guide you through the process. Worth the money.
- b. Become incorporated. Get on the NYS website to walk you through the process:
<https://www.dos.ny.gov/corps/nfpcorp.html#certinc>
- c. Register with the NYS Charities Bureau.
https://www.charitiesnys.com/charities_new.html
- d. File a 501©3 with the federal government. Takes six to nine months. 28 pages. Sigh... <https://www.nolo.com/legal-encyclopedia/nonprofit-tax-exempt-status-501c3-30124.html>

3. NOW YOU HAVE A PROGRAM – WHAT’S NEXT?

- a. **Staff** – start with all volunteers as staff. Rotate the responsibility of scheduling rides or simply choose what will work best for your organization to develop your program.
 - 1) Most important is to use a Google spreadsheet to keep track of all the phone calls coming and going out. You will always have a history of who said what to whom. When you use Google, everyone will have access to the phone log from their own computers. Keeps everyone up-to-date on what is going on in the program.
 - 2) Develop your own system for scheduling rides. Again, Google spreadsheets are very helpful because of the easy access.
 - 3) Keep careful records of the number of trips, unduplicated clients and miles. You might not need the numbers to start, but once your program moves forward and you need to write a grant, you’ll be ready.

- b. **Volunteers** – application, two references, copies of the volunteer’s driver’s license, car registration, insurance card and driving abstract, which can be obtained online from the DMV for \$7.
 - 1) Train either individually or in groups.
 - 2) When scheduling a ride, give the volunteer detailed information about the client, i.e., walker, cane, front door, back door, lobby, who to call to confirm the ride.

- c. **Training manual** – include carefully detailed instructions of what is expected of the volunteer. It is actually hit and miss. The Training Manual will be revised many times.

4. INSURANCE

- a. If volunteers are in an accident while volunteering for your program, they have to use their own insurance first. That is the law of the land.
- b. Board of Directors should also be covered by insurance.
- c. You can buy an umbrella policy to cover any excess insurance for the volunteers and for the Board from several places, i.e. New York Council on Nonprofits (NYCON), CIMA.

NYCON website is: <http://www.nycon.org/>

CIMA website is: <https://www.cimaworld.com/nonprofits/cima-volunteers-insurance/>

5. SAFETY

- a. Volunteer transportation is very colorful. There are many nuances with clients and volunteers alike. But **safety is black and white. Never ever compromise on the safety of the client or the volunteer.**

Decide what constitutes safety from the outset, i.e., no wheelchairs, no oxygen, no driving a client to the ER at a doctor's request. Call 9-1-1. Do not drive until the client has his/her seatbelt on.

BEST OF LUCK!!!



VOLUNTEERS ARE THE BOSS!

The time that a volunteer puts into the organization is up to the volunteer.

If you can commit to one or two days a week that would be wonderful, but many volunteers prefer to be called on an "as needed" basis, according to their availability.

Transporting a client to a medical appointment: the volunteer picks up the client from home, drives to the medical facility, and drives the client home. On average, about two hours - give or take.

Grocery shopping takes about two hours. Arrangements are made between the client and the volunteer.

Telephone reassurance, visiting, and respite are provided to the clients in accordance with the volunteer's schedule.

Please **DO NOT CALL THE VOLUNTEERS AT THEIR HOMES**. If you have a question, please call either the office or the cell phone. Thank you!



MILEAGE REIMBURSEMENT

Volunteers are reimbursed .30/mile, regardless of the service the volunteer provides.

INSURANCE COVERAGE

When volunteers have a client in the car, they are covered with our excess insurance for up to \$5,000 in medical coverage, \$1,000,000 in auto liability and \$1,000,000 in personal liability. In the unfortunate event you are involved in a motor vehicle accident while driving a client for Friends of Seniors, as with any volunteer work, volunteers must use their insurance first. Friends of Seniors will cover the excess.

In the event you are in an accident while doing Friends of Seniors work, and you completed the NYS Driver's course within the last three years, Friends of Seniors will pay half your insurance deductible.



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MISSION STATEMENT: To provide basic support services to the Dutchess County older adult community.

- Non-emergency Medical Transportation
- Grocery Shopping
- Visiting
- Telephone Reassurance
- Respite for Primary Caregivers

ThinkDIFFERENTLY



Friends of Seniors is an independent 501(c)3 nonprofit established in 2004 that provides the following services:

Non-emergency medical transportation to doctors' appointments, lab tests, dialysis, physical therapy, dental appointments and surgical procedures.


Assistance with grocery shopping, if the client has no relatives in the area.

Visiting with seniors who could use some company. You can play a game, read a book out-loud, talk or simply watch TV. Whatever works!

Telephone reassurance is a service that keeps an isolated senior better in touch with the outside world. Calls are made whenever it is convenient for both the volunteer and older adult.

Respite for primary caregivers. A volunteer will come into the home to stay with the homebound person allowing the caregiver some quality time for him/herself.

If Friends of Seniors cannot help you, we will do our best to find an agency or an organization that has the resources to meet the requested need.



Volunteers cannot:


- give you their last names or their home telephone numbers.
- provide hands on care such as personal grooming, transfer from a bed to chair, etc.
- administer medication
- provide housekeeping services
- transfer people in wheelchairs* or transport people who are on oxygen*
- transport Medicaid recipients;

Medicaid provides transportation

*We drive our own cars and are not equipped or trained for wheelchair transport or people on oxygen.

FoS needs two weeks' notice on medical appointments, but if something comes up for you sooner, call us anyway.

COMMUNITY SENIOR TRANSPORTATION PROGRAM (CSTP)
Lagrange/Pleasant Valley van for trips to malls and shopping centers runs Tuesdays and Thursdays Call 485-1277 for reservations. Lagrange and Pleasant Valley seniors only.



Friends of Seniors transports clients to non-emergency medical appointments from 5:00 a.m. until 5:00 p.m. Monday through Friday.

Non-emergency medical transportation within Dutchess County, and to Albany, Connecticut, NYC, Columbia, Orange, Putnam, Ulster and Westchester counties.

If you need to cancel an appointment or you are ready to be picked up from your appointment, call 845-240-0241.

In inclement weather if the schools are closed, so are we.

If you have an emergency, call 9-1-1.

There is no fee for any of the services provided, although many seniors prefer to give a \$5 to \$10 tax-deductible donation.

Friends of Seniors is partially funded by Dutchess County, NYS Office for the Aging, Administration on Aging and Dutchess County Office for the Aging. Dialysis transportation is provided by a grant from the Margaret J. Campbell and Dorothy F. Campbell Fund of the Community Foundations of the Hudson Valley.

Please DO NOT CALL THE VOLUNTEERS AT THEIR HOMES. If you have a question, please call either the office or the cell phone. Thank you!