

# Partnering with Municipalities

## Friendly Visitor Programs

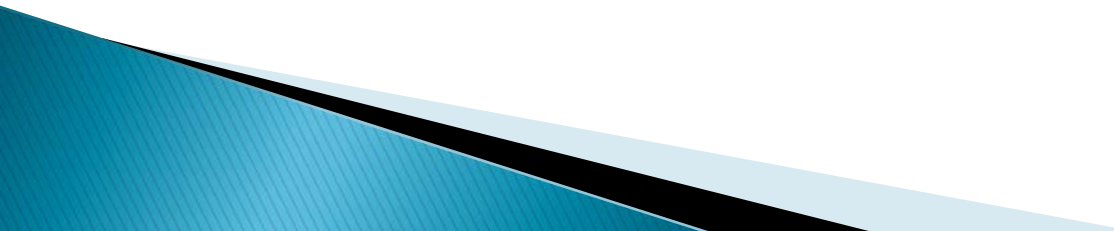


# Advantages

- ▶ Increased volunteer pool
- ▶ Increased number of people served
- ▶ Build collaborations
- ▶ Increased program visibility
- ▶ Income

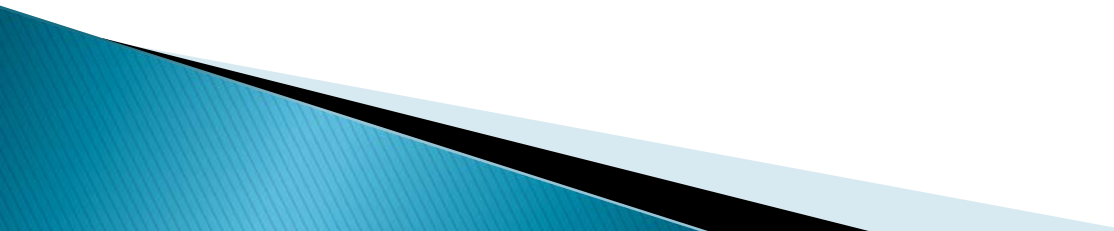


# How to Proceed

- ▶ Connect with a municipality board member who is interested in having the municipality adopt the program
  - ▶ Ask to present the potential partnership at a work session or a town meeting
  - ▶ A representative from your local Area On Aging or other government agency that you have an existing relationship should accompany you
  - ▶ Make sure the municipality supervisor/ mayor is on board
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# Proceeding...

## When presenting have ready:

- ▶ Your agency and program brochures
  - ▶ Sample budget
  - ▶ Stories of people in the area who are receiving services or waiting for services
  - ▶ Sample MOU
  - ▶ Goal– Municipality adopts program– Resolution (Process takes about a year)
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Sample Budget

Town of New Windsor Friendly Visitor Program

**Jewish Family Service:**

*Program Supervision & Volunteer training*

*Director 1 hour per week* \$1,184

*Admin. Asst (logs in all activities) 1 hour per week* 858

*Travel for Supervision/Background checks and volunteer insurance* 1,700

*Agency overhead (rent, utilities)* 758

*JFS Sub total* \$4,500

\*Professional insurance

\*Supplies for training

\*In kind

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*Coordinator*

*8 hours/wk @ \$14/ hr* \$5,824

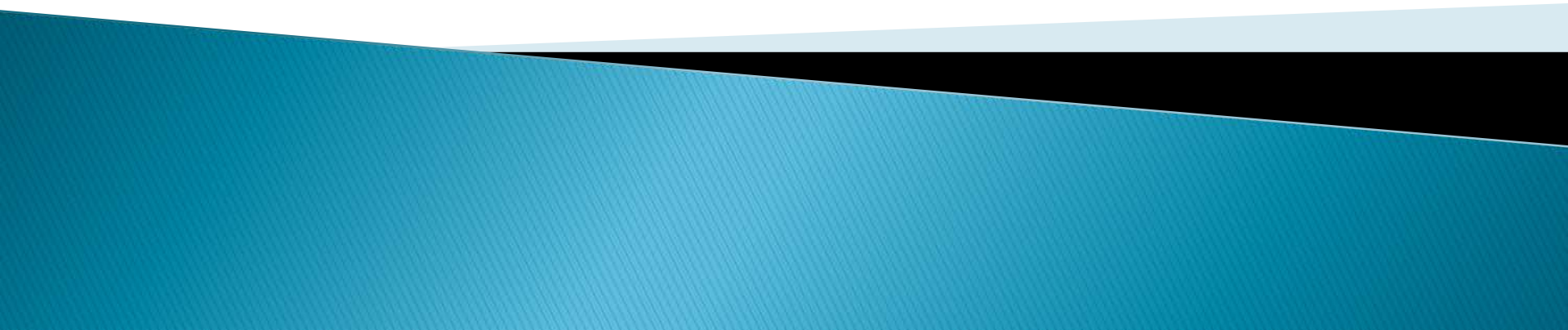
*Fringe* 582

*Supplies* 500

*Mileage reimbursement for coordinator* 250

**Total cost of program** **\$11,656**

**Sample Memorandum of  
Understanding (MOU) with  
Municipality Program Budgeted as a  
Line Item**



**SAMPLE DOCUMENT**

**MOU between Town Seniors Project and Jewish Family Service**

This is a memorandum of understanding between Jewish Family Service of Orange County, Inc. and the Town Seniors Project. The purpose of the collaboration is to provide volunteers to assist seniors in the Town. Assistance can include services listed in the Town Seniors Project brochure such as at-home friendly visits, reassurance telephone calls, grocery shopping, transportation, and light household and yard chores.

**Jewish Family Service will:**

- Promote the partnership between the Town Seniors Project and Jewish Family Service which may include listing the Town Seniors Project in brochures, flyers, pamphlets, news articles, JFS website or media announcements. JFS will make available to the Town Seniors Project all such materials.
- Provide a supervisor to work with the Town Seniors Project coordinator. Supervisor will attend TSP meetings and present a report of volunteer/neighbor activities.
- Assist the coordinator with problematic neighbor or volunteer issues. The supervisor will train the coordinator to perform neighbor home visits and provide a book of community resources.
- Supervisor will meet with coordinator regularly to provide additional trainings and community information to further assist coordinator.
- Train and supervise volunteers. Volunteers will be encouraged to attend additional trainings offered by Jewish Family Service.
- Conduct background checks on all volunteers via same process that JFS uses to perform background checks on other volunteers.
- Provide general volunteer liability insurance and supplemental automobile liability insurance to all volunteers while they perform volunteer duties under the Town Seniors Project name.
- Present yearly budget for services.
- Submit vouchers for reimbursement of budgeted items.

**The Town Seniors Project will:**

- Promote the partnership between the Town Seniors Project and Jewish Family Service. This may include listing Jewish Family Service in brochures, flyers, pamphlets, news articles, media and web sites. Should the Town Seniors Project design any materials highlighting the partnership with JFS, the Town Seniors Project will provide said materials to Jewish Family Service.
- Provide a coordinator
- Recruit volunteers and neighbors.
- Perform intakes on all neighbors requesting services.
- Provide a meeting space to train volunteers.
- Provide funding to JFS that will be included in the approved yearly Friends of Seniors budget.
- Develop written policy and procedures for handling of money including appointing a record keeper to document all money collected and expended for program.
- Give all money collected (donations and fundraisers) to JFS within 3 days of receiving funds unless another time frame is mutually agreed upon.
- Maintain a ledger documenting all expenditures and income.
- Submit all advisory board approved budgeted receipts for reimbursement to JFS in a timely manner.

The undersigned have reviewed the above and agree to the items outlined. This agreement is in effect for one year, starting the date when the agreement is signed. Each party may exit this agreement at any time, for any or no cause, providing that the other party is given 30 days notice. Notice must be given in writing.

Jewish Family Service of Orange County  
720 Route 17M, Middletown NY 10940

Town of Newburgh Friends of Seniors  
1496 Route 300 Route 300 Newburgh NY12550

\_\_\_\_\_  
Print Name, Title

\_\_\_\_\_  
Print Name, Title

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

# Your agency's responsibilities

- ▶ Provide the general liability volunteer insurance
- ▶ Train all volunteers
- ▶ Perform volunteer background checks
- ▶ Agency employee sits on the committee
- ▶ Track all services and provide monthly reports for the advisory committee and council members





- ▶ Guide the advisory committee through the process of setting up the program
- ▶ Provide supervision for the entire program as a consultant
- ▶ Assist in locating a coordinator
- ▶ Offer continuous support
- ▶ Supply coverage when coordinator is unavailable for a length of time
- ▶ Submit quarterly vouchers for payment



# The municipality's responsibilities:

- ▶ Form an advisory committee
- ▶ Find a coordinator– paid or volunteer
- ▶ Supply a space for the coordinator and a designated phone line for the program. It can be voicemail only
- ▶ The coordinator will need access to a fax machine and computer
- ▶ Space for a committee to meet and volunteer trainings
- ▶ Advertise program on website and social media when available



# The Advisory Committee



- ▶ A council member or town clerk should be on the committee
- ▶ Decide target population and services to offer
- ▶ Arrange informational meetings to recruit potential volunteers
  - Your program representative leads the meeting
  - Have a sign up sheet with training dates for those interested in taking the trainings

- ▶ Provide outreach
- ▶ Recruit volunteers– design flyers
- ▶ Design and print program brochure
- ▶ Distribute flyers/brochure advertise in local publications and stores (The committee members know the local places to advertise)
- ▶ General oversight of the program
- ▶ At least one committee member attends town meetings





## Town of Blooming Grove

Orange County, New York

*"A Bicentennial Community"*

### Town of Blooming Grove Neighbors for Neighbors Program

*Bring Sunshine Into Someone's  
Life!*

Volunteers may provide the following services:

- Transportation to medical appointments
- Shopping, Essential Errands or Friendly Visit

### Volunteer Training Sessions

Friday, February 7th- 10:00 a.m.—Part 1

Friday, February 14th—10:00 a.m.— Part 2

Town Hall, 6 Horton Road, Blooming Grove

All Ages are Welcome!

RSVP REQUIRED—496-0466

To RSVP — Call - 845 496 0466



DO YOU LIKE TO HELP  
OTHERS?  
DO YOU HAVE AN HOUR  
OR TWO A WEEK?

Introducing

### the Town of Woodbury Friendly Visitor Program



*Bring Sunshine Into Someone's Life!*

Volunteers may provide the following services:

*transportation to medical appointments •  
grocery shopping • friendly visits/phone calls*

### VOLUNTEER INFORMATION SESSIONS

Thurs Oct. 3rd @ 2:00PM

Wed Oct. 9th @ 7:00PM

\*Volunteers must be 18 or older

Highland Mills Fire House

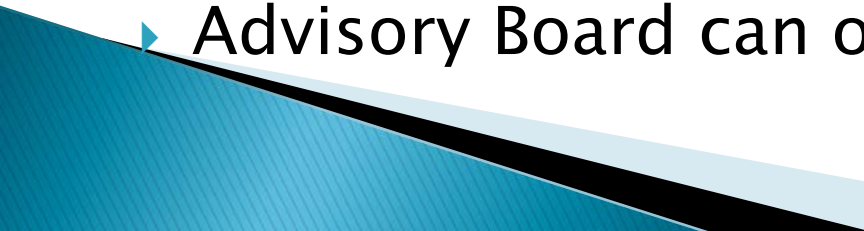
455 Route 32, Highland Mills

For more information, call:

845-928-7578 ext. 1



# Obstacles

- ▶ Finding the key person for your municipality connection
  - ▶ Paid coordinator vs. volunteer coordinator
  - ▶ Municipality concerns about liability
  - ▶ Overcoming possible preconceived opinions of your agency/ program
  - ▶ Love the program, but no money in budget
  - ▶ Office space for coordinator
  - ▶ Designated phone line
  - ▶ Advisory committee members reflects community
  - ▶ Advisory Board can overstep boundaries
- 

# Things to Remember

- ▶ Wait until municipality has a pool of volunteers before advertising program to the public
- ▶ Have your agency's logo on all flyers and announcements



# Questions

