



Goodwill Guidelines for Districts/Units 2021

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Districts/Units Goodwill ¹

SUGGESTED GUIDELINES FOR GOODWILL COMMITTEES (2021)

Introduction

A Goodwill Committee plays a very important role within a district. A wide variety of acts of **caring, compassion and celebration** and to **address social isolation** are performed and vary from district to district. As the district grants include funding for Goodwill, districts are encouraged and expected to allocate funds based on their members' needs.

With over 81,000 RTOERO members, it is a challenge for Goodwill Committees to be aware of current milestones of individual members in districts. It is important, therefore, for committees to have in place a Goodwill program that will address these situations, in accordance with the procedures established by the RTOERO Office that adhere to appropriate privacy legislation.

Personal contact is always considered the best kind of Goodwill that can be offered to our colleagues. While the members of a district Goodwill Committee may provide leadership and direction in this regard, it is appropriate and encouraged for **any concerned RTOERO member to respond when a situation is known**. Individual circumstances might also be shared with district/unit executives when deemed appropriate.

Under exceptional circumstances, when in-person visits are not allowed or recommended – such as the COVID19 pandemic – members must abide by RTOERO protocols and local health authority advisories.

These Guidelines are prepared to assist in making acts of **CARING, COMPASSION and CELEBRATION** “happen” within the RTOERO districts.

¹ Each district with units has its own way of implementing Goodwill services. In this document, suggested guidelines apply to units as agreed by their district.

Goodwill Volunteer Task Description – Overview

The Goodwill Volunteer is a caring person who aims at improving the lives of RTOERO members and seniors. By reaching out to members, volunteers not only express condolences, comfort to those who are ill, or messages of celebration and recognition, but also increase RTOERO's positive profile with members and within their community.

Each district prioritizes which actions they wish to organize and decides who will direct each of these activities.

Suggestions for Recruitment, Training and Succession of Goodwill Representatives

- At district meetings, actively promote and encourage members to become a part of the Goodwill Committee. Add to the committee rather than just replacing an outgoing volunteer. Emphasize the benefits for the individual volunteering rather than the needs of RTOERO.
- Advertise the need for volunteers on the district website and newsletter.
- Approach friends, talk directly to, or telephone a potential volunteer when asking for assistance or involvement.
- Have outgoing volunteers search for a successor as soon as they are considering leaving the committee. Capitalize on the expertise of the district executive for suggestions.
- Introduce the concept of volunteering on the Goodwill Committee at Retirement Planning Workshops.
- Invite potential Goodwill representatives to lunch or coffee to explain the role. Welcome volunteers through nurturing, training, learning and using inclusive behaviours.
- Prepare a district binder on Goodwill responsibilities:
 - Briefly identify the skills/responsibilities/job descriptions that will be needed for the volunteer.
 - Accept and welcome ideas from new volunteers. Initiatives often work better when implemented by those who generate them. Explain the financial parameters for your district.
 - Document your plans and achievements. A listing of what the group has accomplished, and a road map showing a vision for the near future, conveys a sense of structure and gives confidence to new volunteers who are assuming a new role.

- District/unit executives should periodically review their Goodwill Guidelines to avoid duplication of effort and to respond to changing circumstances.
- Keep abreast of members' needs at district gatherings.
- Don't try to do every job yourself. Although it is often easier to do things yourself than to recruit helpers to whom you can delegate tasks, you might send the message to your potential replacements that a leader has to do all the work alone.
- Consider co-chairs, job shadowing, on-the-job training, and a mentoring system.
- A positive, supportive, relationship is essential. A volunteer leader should be accessible to a successor, so that the new leader has a source of information, history, advice and – perhaps most importantly – encouragement.
- Document and share a list of resources such as a list of local funeral homes, charities, florists, etc. in your Goodwill Guidelines.
- Discuss members' individual responsibilities with your committee. Divide duties if possible; for example, one person could complete the birthday cards over 80; another could look after bereavement tasks; another holiday cards; another anniversaries and congratulatory notes, another phone calls, etc.
- Provide some form of appreciation to Goodwill volunteers. For example, host a lunch paid for by RTOERO, present a small gift, or recognize outgoing volunteers publicly at a district meeting or in the newsletter. **Do not give gift cards** to members.

Organization of District Goodwill Services - Suggestions

- Use phone lists to contact members.
- Ensure cross district representation, distribute tasks (example, by postal code) and organize Goodwill activities by geographical region.
- Ensure connection between Goodwill representatives and the district Executive and establish a regular reporting procedure to update the district executive on the activities of Goodwill representatives.
- Make sure that appropriate material is forwarded to Goodwill representatives.
- Develop an operations' manual for Goodwill activities. It can be part of the information binder mentioned above.
- Use computer spreadsheets to keep track of members and activities, in accordance with the procedures established by RTOERO to adhere to appropriate privacy legislation (<https://rtoero.ca/privacy-policy/>).

- Goodwill representatives should consult the document Summary of Legal Responsibilities/Liabilities for Goodwill Representatives. (Appendix A)

Funding

- Ensure an easy flow of funding from the district executive to Goodwill representatives with some flexibility in the budgeting process.
- Set clear limits for specific types of expenditures. In addition to normal items reimbursed (cards, flowers, etc.), the district may consider reimbursing phone charges, parking/travel, Committee meeting expenses, postage and delivery.
- Budget funds wisely, using floats and receipts for reimbursement.
- Expend Goodwill funds specifically on the needs of members.

Obtaining Information on Members Needing Assistance

- Publicize the services of the Goodwill representatives and their contact information (newsletters, email blasts, website, at district/unit functions).
- Use an informal network of members.
- Telephone calls, emails and letters to members are good ways to communicate with those in need and address social isolation.
- Encourage members to inform the district executive when they become aware that members are in need.
- Stay in touch with family members, if appropriate.
- Use the list of district members provided by the RTOERO Office.
- Print business cards for Goodwill representatives to be distributed to members asking them to be in touch when they become aware of members in need.
- Call all members over 85 to see if they would like a visit or telephone updates regarding local activities.
- Remind members to provide any change of address/telephone directly to the RTOERO office (membership@rtoero.ca) to ensure accuracy of contact information.

Suggestions for Activities

General

- Celebrate significant milestones (anniversaries, special birthdays, accomplishments, awards, etc.), in accordance with the procedures

established by RTOERO that adhere to appropriate privacy legislation (<https://rtoero.ca/privacy-policy/>).

- Include personal visitations when permitted, Goodwill cards, birthday cards, get well cards, holiday cards, flowers or small gifts at Christmas into your plan, but no gift cards. Remember members in times of sickness (hospitalized or not) or other traumatic events in their lives. Consider using notelets from the RTOERO e-store (<https://www.rtoestore.ca/>) to send personal notes, as greetings, as attachment to a gift, to extend get well wishes, to express sympathy or concern.
- Suggest activities that address social isolation. Work with the social committee to organize virtual activities that address social isolation.
- Recognize the contribution or situation of members in district newsletters while respecting their privacy/confidentiality wishes. Remain sensitive to individual preferences.
- Sign the guestbook when visiting nursing homes/senior residences to leave a record of the visit.
- Lay a wreath on behalf of the district at Remembrance Day ceremonies.
- Create a “flat” promotional item, easily packaged and mailed to members, to promote Goodwill activities.
- Host social lunches to combat isolation, to welcome new retirees and follow-up with those who could not attend.
- Maintain seasonal contact with those members who have relocated to other parts of the country, yet maintain their RTOERO membership in your district/unit.
- Remember members who have passed away by setting up a table at a district meeting with a candle/picture to celebrate their lives.
- Honour Past Presidents at social events.
- Provide free lunches for members over 85, making sure caregivers or family members feel welcome to accompany them.
- Maintain a list of those members requiring Goodwill attention with contact information including their specific needs, with their permission.
- Keep track of the “shut-ins” who cannot attend meetings/events.
- Organize a carpool taxi or limo service to offer transportation to meetings. Several seniors’ homes make available their wheelchair bus or other forms of transportation with prior notice. Provide a taxi (or ride) service for seniors unable to get to an event to which they are invited.
- Maintain updated lists of telephone numbers for local community services such as Meals on Wheels, Long Term Care facilities, Nursing Homes, Homes for Seniors or other services / facilities operating in the area – such information is usually available via 211.

- Provide ongoing support: assist with errands, appointments, with letter writing or reading; assist with contacting social services and outreach programs as appropriate (CCAC, Elder Abuse Ontario, Best Doctors).

Bereavement

- Check local funeral homes, community websites and local newspapers for their *In Memoriam* section for members who have passed away. The Goodwill Chair should also provide these names from the monthly change list sent by the RTOERO Office.
- Attend the visitation and/or funeral service for the member or family member.
- Provide an honour guard for the visitation and/or funeral service, with the permission of the family.
- Attend or arrange transportation to the funeral home with bereaved members, if appropriate.
- Send a note of sympathy.
- Make a small donation to the charity of choice (e.g. RTOERO Foundation) in case of a deceased member.
- Make a follow-up visit to bereaved members.
- Establish a common recognition program memorializing all members who pass away: e.g. a community tree-planting program, donation to area library/gallery, at a dedicated place on the district website.
- Alert the RTOERO Office to send information to a surviving spouse of a member on the processes/deadlines of putting benefits in their name (re: spousal pension, CPP, insurance benefits coverage, etc.).
- Deliver a Memorial tribute at a district meeting.

Volunteers - Recognition

- Let volunteers know who you are.
- Acknowledge the role volunteers had in the RTOERO event and how they excelled.
- Express your appreciation and let the volunteers know their help would always be appreciated in the future.

Messages for E-Mails, Notes and Cards

Examples of the following can be found online, keeping in mind copyright laws:

- ❖ Thank you letter for volunteers
- ❖ Birthday messages
- ❖ Anniversary messages
- ❖ Messages for those who are ill
- ❖ Sympathy messages
- ❖ Letters of congratulations
- ❖ ...

Assistance from RTOERO

(1-800-361-9888 or 416-962-9463)

- RTOERO Notelets on request at rtostore.ca
- Information regarding volunteer recognition – Anna-Rita Lunghi alunghi@rtoero.ca
- Certificates for 100 year old members – Sylvia Link slink@rtoero.ca
- Assist with the updating of members' contact information as needed – membership@rtoero.ca
- Other Goodwill inquiries – Pauline Duquette-Newman, pduquette-newman@rtoero.ca
- RTOERO Foundation In Memorial cards – Deanna Byrtus, dbyrtus@rtoero.ca

Appendix A

Summary of Legal Responsibilities/Liabilities for Goodwill Representatives

A Guide for any RTOERO member wishing to visit fellow members in a hospital, retirement or long-term care facility

The following protocol is based upon legal advice. While legislation and case law does not generally focus on duties or liabilities applying to visiting members of the public, information contained in the *Long-Term Care Homes Act, 2007* (LTCHA) and the *Retirement Homes Act, 2010* (RHA) provides guidance on how RTOERO members should behave when visiting patients/residents of various facilities.

Issues

- Should the families of patients/residents in such facilities be informed before a fellow RTOERO member visits?
- If patients/residents share information about the personnel in their facility, do visiting RTOERO members have a duty to report that information?
- If patients/residents share information about family members, especially in a derogatory way, or makes requests about legal matters such as estates or wills, what should the visiting RTOERO members do?
- If patients/residents lacking legal capacity make false comments about visiting RTOERO members (e.g., that the RTOERO members tried to harm them), what should the visiting RTOERO members do?
- If patients/residents make false claims against visiting RTOERO members, what actions should the RTOERO members take?

Visiting Members

- Residents of facilities such as long-term care homes and retirement homes have the right to meet with visitors of their choice, as well as do patients in hospitals.
- If desirous of visiting members in hospitals, long-term care homes, retirement homes, and hospitals, Goodwill Representatives and other members must call ahead to determine the status of the patients/residents prior to visiting them to ensure a visit on the planned day is appropriate.
- Members visiting fellow members should make clear the purpose of their visit – of a “goodwill nature”, to bring greetings on behalf of RTOERO and District, cheer up, etc., and, if warranted, to state that they are not available/qualified to provide advice on financial, medical or legal matters.
- It is advisable that members visiting fellow members in one of these settings should do so in pairs. In the event that the member being visited

accuses the Goodwill Representatives/other members of inappropriate behaviour, there is a fellow RTOERO member present to corroborate that proper decorum was followed.

- In order to avoid complaints from residents, visiting RTOERO members should ensure that the needs and wishes of the patients/residents are respected.
- Accordingly, RTOERO members normally would not need to inform the family of patients/residents before going to visit, provided that the patients/residents are agreeable to meeting with RTOERO members.
- If RTOERO members are meeting with patients/residents in private and an individual patient/resident starts behaving erratically or disruptively, RTOERO members should immediately seek facility staff for assistance rather than attempting to control the situation on their own.

Visiting Members Lacking Legal Capacity

- Different considerations may apply in circumstances where patients/residents lack legal capacity. Such patients/residents may have a substitute decision-maker who oversees all aspects of the individual's treatment and care.
- In cases where patients/residents are incapable, RTOERO members may wish to notify family members in advance in order to ensure that such visits are consistent with the individual patient's/resident's needs and abilities.
- Both the LTCHA and the RHA define "incapable" as meaning "unable to understand the information that is relevant to making a decision concerning the subject matter or unable to appreciate the reasonably foreseeable consequences of a decision or a lack of decision".
- It is important to note that capacity is determined with respect to the subject matter or decision at issue, and is not an all-or-nothing concept. For example, a person who lacks the capacity to appreciate the reasonably foreseeable consequences of a particular medical procedure or medication may still have the capacity to decide whether or not he/she wants to meet with certain visitors.
- When meeting with incapable patients/residents in particular, it is advisable to meet in public areas of the facility where staff members are able to oversee the interaction (provided that the patients/residents are comfortable and able to do so).
- Visiting RTOERO members may also consider having an individual incapable patient's/resident's family member or other trusted person attend the meeting as well.

Harm/Abuse of Patients/Residents who are Members

- There are legislative duties to report that apply in circumstances where a person has reasonable grounds to suspect that harm or abuse of patients/residents has occurred or may occur.

- If patients/residents tell a visiting RTOERO member derogatory information about a family member that does not raise any concerns regarding abuse or other misconduct, then the RTOERO member does not need to respond to this information at all and should instead remain focused on the matters that the member is there to discuss.
- If, however, patients/residents tell a visiting RTOERO member that family members or facility personnel are abusing them, attempting to misuse or misappropriate their money, or otherwise causing harm or a risk of harm to the patients/residents, then this may trigger the duty to report under the LTCHA or the RHA, even though the family member is not a staff member of the facility.

Requests about Legal Matters

- If patients/residents ask or make requests about legal matters, the visiting RTOERO members should make it clear that they do not have the authority to assist with these matters.
- RTOERO members should not attempt to provide legal advice or claim to be able to assist patients/residents with legal matters. Instead, members should direct the patients/residents to discuss these issues with their attorney, or substitute decision-maker if they are incapable.

False Allegations Made by Patients/Residents

- Though unlikely that patients/residents would knowingly or maliciously make false allegations, other than perhaps a member lacking legal capacity, (e.g., dealing with dementia), this may occur.
- If patients/residents began to behave erratically or disruptively, RTOERO members immediately should seek out facility personnel for assistance rather than trying to control the situation alone.
- When meeting with patients/residents who are lacking legal capacity, it is best to notify their family in advance so a family representative can be present. As well, the meeting should be in a public area of the facility so staff are able to oversee the interaction that occurs in a visit.
- In the event that patients/residents, likely one lacking legal capacity, make false allegations which lead to an investigation, RTOERO members should cooperate fully with the investigating body. This may involve meeting with investigators and providing documents or information regarding the alleged incident and the reasons for the visit.