Principles of Volunteer Resource Management
Module 6

Technology, Tools, and Professional Development

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Principles of Volunteer Resource Management

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ABOUT YOUR AHVRP SPEAKER

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Sabrina Coleman Clark is a graduate of Ohio University, possessing a Bachelors Degree in Music Therapy and a Masters in Vocal Performance. She is known nationally as a presenter, workshop leader and consultant for non-profit and volunteer organizations, and as a versatile vocal concert artist. Her dynamic presentations on the stage and in educational settings have made her a much sought-after performer and lecturer.

Her special ability to delight audiences and create educational programs has expanded to the areas of workshop facilitation and lectures. She is considered a subject matter expert in the fields of volunteer management, communications and leadership. She is a certified trainer for national organizations, including the American Hospital Association (AHA) and the Points of Light Foundation’s Youth Leadership Institute. She has assisted in the design and development of a training program for volunteer administrators and study guide for national certification through AHA. As the chairperson for Professional Development on the Board of the Maryland Council of Directors of Volunteer Services, Ms Coleman Clark coordinated the effort to develop “The Leadership Institute for Non-Profit and Volunteer Management at Southern Maryland’s Salisbury University. Formerly, she has worked in the field of Volunteer Management within the Department of Veterans Affairs (locally and nationally), both as a Program Manager and Training Coordinator. She continues to speak at a number of national conferences and before associations of volunteer directors around the country.

Currently, Ms. Coleman Clark is employed by the Department of Veterans Affairs (VA) Central Office in Washington, DC. She is a Learning Consultant for the VA Learning University, a virtual learning center devoted to the professional development and training of VA employees nationwide.

Her distinguished dual-career has rendered her the recipient of a number of honors and awards, including Who’s Who of Professionals, Phi Kappa Phi National Honor Society, Federal Executive Board Award, Toastmasters International, the Maryland Governor’s Award; along with a host of awards from vocal competitions, including the Leontyne Price Competition in New Jersey and from the Dicapo Opera Theater of Manhattan.
Principles of Volunteer Resource Management

Full Course Description

Become a change master. See the challenges of a health care environment faced with the aftermath of the Balanced Budget Act, declining reimbursement, staffing shortages, mergers and the competition for declining resources as an opportunity to recreate your program. For the experienced volunteer administrator, The Principles Course reviews the fundamental building blocks of a dynamic program, re-tooled to better meet the changing needs of today’s health care facilities. For the new manager, it is an opportunity to learn, relearn, discuss and experience the rationale behind volunteer program design. The mix of both experienced and new administrators in the field offers a unique forum for examining what we do and how we do it.

Our Mission

To enhance the profession of health care volunteer administration through shared best practices, a philosophy of continuous improvement and a commitment to adapt to the changing needs of our health care organizations.

Our Expectations

To have you leave this session with:

- **A heightened awareness** of factors influencing today’s health care decisions.
- **A commitment to be proactive** in your response to changing needs.
- **A fresh look** at the fundamental building blocks of a volunteer program, re-tooled for today’s health care environment.
- **The belief that your value** to the organization is yours to prove!
PRINCIPLES COURSE MODULE DESCRIPTIONS

Principles of Volunteer Resource Management Module 1:

**Volunteer Resources Strategic Planning and Program Enhancement**

Competing for resources? Striving to achieve a higher level of “program credibility”? What’s it going to take? Adapting traditional volunteer programs to what has become a new era in healthcare and a new generation of volunteers is critical to positioning your program for the future. Hear about current healthcare trends impacting your program and integrated program models designed to support these trends. This session will also cover the DVS’s role with advocacy, emergency and disaster preparedness, and strategic alignment of goals. Achieving staff buy-in, and those all important outcome measures to market the “value” of your volunteer program will be reviewed. Thriving, not just surviving, in today’s healthcare environment is a key focus of this session. Be the “visionary” leader it will take to move your program to the next level…and enjoy the success you will find!

Principles of Volunteer Resource Management Module 2:

**Legal Awareness for Volunteer Administrators**

Anyone can sue anyone for anything at any time. Are you familiar with the laws that directly pertain to volunteer management? This session will help keep your hospital out of court and out of the news. The program provides an overview of current laws with implications for volunteers and volunteer services administrators. Participants will learn and discuss Labor and Screening Laws (Fair Labor Standards Act and Child Labor Law, use of volunteers during a work stoppage, and the Volunteers for Children Act of 1996), Privacy Law (HIPAA), Anti-Discriminatory (Americans with Disabilities Act and Amendment, Title VII of the Civil Rights Act, EMTALA), Liability Coverage Law: Federal Volunteer Protection Act of 1997, Tax Laws (Internal Revenue Service, Guidelines for Scholarship Programs, and For-Profit versus Non-Profit Fundraising/Advocacy), state-level Community Benefit Act to protect 501 and Safety Laws (OSHA).
Principles of Volunteer Resource Management Module 3:

**Ongoing Preparedness for Joint Commission**

Are you prepared for your next Joint Commission Survey? Do you know the current National Patient Safety Goals for healthcare? Come review the past, present, and future standards to understand practical options for complying with Joint Commission expectations now. This interactive program includes current information, best practices, and provides great resources to strengthen volunteer services programs! With unannounced surveys, tracer methodology, new numbering systems and reorganized standards, the Joint Commission has streamlined the process to assess and insure quality patient care and safe environments. The Joint Commission recognizes the importance and impact that volunteers can have in direct patient contact areas. The program explains how volunteers are interpreted in the standards, so you can focus on the standards that pertain to your program and people. This session will help teach you specific strategies how to stay in constant readiness for the Joint Commission. Ultimately, you are responsible for insuring that your volunteers provide safe, high-quality, effective services. This program is designed to give you the tools you need to maximize positive outcomes!

Principles of Volunteer Resource Management Module 4:

**Proactive Program Management, Assessment, and Design**

Does your program have the “WOW’ factor? Do you have the right services, for the right departments, at the right time? Where can you have the greatest impact? How do you get staff buy-in to service these areas? What is the best training technique to get staff to take ownership of their assigned volunteers? How do high impact services play into recruitment? Get the answers to these and other key questions in this power-packed 90-minute session that covers: ongoing program assessment, developing “high impact” services, building a staff training program that truly works, having clearly defined policies and procedures in place to aid staff in managing their volunteer workforce, and designing recruitment strategies for a new generation of volunteers. This is a program you won’t want to miss!
PRINCIPLES COURSE MODULE DESCRIPTIONS
(Continued)

Principles of Volunteer Resource Management Module 5:

**Program Operations and Risk Management**

In today’s challenging economy, the bottom line for volunteer management professionals is to manage effective and cost-efficient volunteer programs. This session discusses best practice recommendations for the foundation of a successful volunteer program that meets the needs of hospitals and our next generation volunteers. Current standards mandate that safety, security and risk management be woven throughout the entire volunteer program.

This program will provide an overview of the crucial fundamentals including interviewing, screening, training, recognition, and retention of volunteers. What can you say and ask during an interview? What does Joint Commission expect for you to cover during orientation? What do volunteers “really” want regarding personal recognition? How can you keep your volunteers active and involved? This is just the tip of the iceberg of what is covered in this program. In addition to the content, you will receive time-proven sample forms that you can use at your facility. Program Operations and Risk Management is a “must-have” session!

Principles of Volunteer Resource Management Module 6:

**Technology, Tools, and Professional Development**

What are some of the latest and greatest technology tools to assist Volunteer leaders in the daily operation and management of their volunteer programs? How important is Continuous Quality Improvement (CQI) in securing the future of your volunteer program? What resources are available to assist in your own professional development as a volunteer administrator? This interactive session will provide the answers to these and other questions as you look at some best practice tools and discuss topics such as CQI, records management, budget planning, fundraising, integrating technology into program components, public relations, networking, and viable resources for your own professional development.

Even if you are not a “techie” you will have a better understanding of what technology is available in volunteer administration and why it may be well worth the time to learn how to use it. This session reviews what processes will help you to better manage your overall program!
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Module 6:  
Technology, Tools, and  
Professional Development

Content Overview

What are some of the latest and greatest technology tools to assist Volunteer leaders in the daily operation and management of their volunteer programs? How important is Continuous Quality Improvement (CQI) in securing the future of your volunteer program? What resources are available to assist in your own professional development as a volunteer administrator? This interactive session will provide the answers to these and other questions as you look at some best practice tools and discuss topics such as CQI, records management, budget planning, fundraising, integrating technology into program components, public relations, networking, and viable resources for your own professional development.

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Learning Objectives

Upon completion of this module, participants will be able to:

- Implement continuous quality and process improvement practices
- Apply appropriate processes for record and budget management
- Support fundraising efforts
- Integrate technology into volunteer management
- Identify outreach, public relations, and networking opportunities
- Identify professional development resources for volunteer administrator
Continuous Quality Improvement
Records, Finance, and Budget Planning
Financial Support through Fundraising
Integrating Technology into Program Components
Outreach, Public Relations, and Networking
Professional Development Resources
AHVRP Certification
AHVRP Code of Ethics

CONTINUOUS QUALITY IMPROVEMENT

This section emphasizes the importance of establishing a continuous quality improvement (CQI) framework that defines the manner in which the DVS operates the volunteer services department. The CQI plan defines the ongoing process used to improve the quality of service and operations of the department. The manager of a volunteer program must use sound business practices and effective management tools to run the department in compliance with the institution’s established procedures in planning, budgeting, and policy development. The department should be well integrated into the hospital system.

Both the volunteer services administrator and the health care institution seek high standards of health care for their customers. Quality improvement can be defined as measuring a degree of excellence against established standards. A CQI plan should:

- Be customer focused
- Provide feedback
- Use data to provide measurable results
- Include tools and measures that foster knowledge
- Continually review and improve processes
- Identify and define goals and specific objectives

Many organizations are using Six Sigma and Lean methodologies. Six Sigma is a disciplined, data driven approach to eliminating defects. It focuses on improving process capability and eliminating variation through a problem solving approach.
using statistics. Lean is a system concerned with eliminating waste and improving flow by applying Lean principles based on best practices.

The Joint Commission has diligently set quality standards for medical and support services. With continuous quality improvement being a priority in hospitals and nursing homes, volunteer services administrators need to systematically develop standards of excellence for services provided.

Just as volunteers need to know the mission of the organization, they also must know the philosophy and goals of quality improvement as determined by administration. A written Continuous Quality Improvement Plan is as important as the policy and procedure manual.

As volunteer services administrators, we should think about CQI as a tool to help us effectively:

- Identify all our customers (such as volunteers, staff, administration, patients, families, visitors, and vendors).
- Measure the quality of the services volunteers provide.
- Communicate in the language of clinical and non-clinical hospital staff.

Practical suggestions to increase comfort with CQI:

- Talk to your institution’s lead CQI staff person. The CQI plan within the organization will determine the reporting mechanism and frequency.
- Know your institution’s Goals and Objectives.
- Creatively identify and recognize problem areas within your area of responsibility that need review and improvement.

Examples of problem areas include:

- Prospective volunteers waiting too long to be interviewed.
- Patient surveys indicating areas of poor customer service.
- Patient care volunteers seek assignment transfers due to lack of meaningful work or poor utilization.
- Gift shop coverage is unreliable causing shop to be closed too often.
- Volunteers asked to attend orientation are not complying.
Plan and implement an organized process to improve your department’s performance, based on your institution’s established protocol. The process starts with these action steps:

- Identify concerns.
- Establish indicators to systematically monitor the concerns.
- Collect information and evaluate, making recommendations for improvement.
- Report back to appropriate department or administrator.

Continuous quality improvement is like a circle, always bringing us back to the beginning and setting the stage for further observations. The process is never ending yet very systematic.

**Benchmarking**

**Source: DVS Advocacy Tool Kit** (An AHVRP members-only online tool kit is available at www.todaysvolunteer.org)

**Benchmarking** is a powerful tool that can help organizations evaluate their processes in comparison to other similar organizations. Benchmarking involves comparing your process with the processes of other organizations to gain knowledge that will allow you to improve the quality of your system, product, or services. Through benchmarking, you can learn how your program compares with others and how you can apply processes to improve your results.

Best practices are often identified through benchmarking. Best practices typically are the most efficient and most effective way of accomplishing a task.

AHVRP members have access to a ListServ that can be used to post questions to peers throughout the country and gather valuable benchmarking information. The ListServ includes an archives section where you can search for information that was posted previously.

**ListServ**

The Association for Healthcare Volunteer Resource Professionals (AHVRP) has created an automated email discussion group designed for interactive discussions with your peers. The Listserv is designed to improve communication and receive immediate answers to your questions from your peers. It also offers a forum for exchanging ideas that allow you to tap into your community and benefit from the experience, knowledge, and wisdom of your peers.
Benchmarking for healthcare volunteer services programs can be challenging because of the variance in program design and operation. However, many aspects of volunteer services programs can be compared easily.

According to Webster’s New Collegiate Dictionary,

“Benchmarking is a point of reference from which measurements may be made. It is something that serves as a standard by which others may be measured.”

♦ Healthcare benchmarking is the process of regularly comparing institutional data regarding similar activities for the purpose of continuous quality improvement.

♦ Many healthcare organizations use benchmarking as a tool to set strategic direction. In order to continue the viability of important programs that provide quality healthcare, it is necessary to document service excellence to the organization.

♦ Benchmarking is a tool used for setting appropriate, measurable objectives for business improvement milestones and targets.

Benchmarking can help healthcare organizations:

♦ Decrease costs

♦ Improve quality and performance

♦ Develop team building

♦ Support data collection for review and process improvement implementation

♦ Focus change management

♦ Foster support and cooperation

The primary purpose of benchmarking in healthcare is to improve patient care. Volunteer services departments nationwide participate in hospital benchmark surveys. Data collected from surveys compare best practice models from hospitals with similar volunteer departments.
Benchmarking reporting criteria may include:

♦ Hours of service
♦ Multiple roles of volunteer services administrators
♦ Revenue managed
♦ Full Time Equivalents (FTEs) per department
♦ Cost per volunteer

*Best practices* are similar programs or systems that yield superior results through strategies performed in a more efficient, cost-effective manner.

♦ It is important to know when and how to adapt best practices to improve performance within the organization.

♦ Resulting comparisons often ignore vast operational differences between volunteer services departments and can vary widely between organizations.

**Volunteer departments can benefit from benchmarking by:**

♦ Identifying existing systems or programs that bring the most value to the organization and its customers

  Examples: Community outreach, customer service, or patient focused programs that support the organization’s goals and objectives and align with the overall strategic plan

♦ Discovering and adapting best practices from other organizations to implement more creative, cost-effective ways to deliver service

♦ Tracking and monitoring program success on a regular basis in order to continuously improve and support the volunteer services department role in meeting the strategic goals of the healthcare organization

Benchmark surveys conducted by healthcare systems can have a tremendous impact on the viability of the volunteer services department regarding staffing and resources.

♦ Preparing data appropriately is important.

♦ Volunteer administrators may also use benchmarking to help demonstrate the overall value of the department to the organization.
Continuous Quality Improvement

Summary of Section Key Points

- Quality improvement is defined as measuring a degree of excellence against established standards.
- A written CQI plan is as important as the policy and procedure manual.
- Benchmarking is a quality improvement method that compares institutional data and helps identify best practices.
- As a DVS, you must be a role model for change with a strong focus on continuous quality improvement.

Joint Commission Implications

☑ The mission of the Joint Commission is “to continuously improve the safety and quality of care provided to the public through the provision of health care accreditation and related services that support performance improvement in health care organizations.”

☑ The Joint Commission surveyors want to see that Volunteer Services is actively involved in the organization’s quality improvement plan and patient safety program. Having knowledge of the current year’s National Patient Safety Goals, and having one or more department initiatives to support these goals, is an expectation.

☑ Anything required by the Joint Commission needs to be supported by some form of documented record of compliance. Anything you have in policy needs to be supported with evidence of compliance.

Technology Tips

 Spreadsheet and data base software programs enable volunteer managers to organize and analyze data collected from CQI programs, assessments and surveys.
RECORDS MANAGEMENT

Records management encompasses the documentation, classification and storing of activities and information. Not all records are required by state and federal law, the regulatory agencies such as the Joint Commission and OSHA. Some records are retained to maintain statistics for reports and publicity.

The following records management lists include:

Service Standards:
- Records of compliance.
- Minutes of Continuous Quality Improvement committee meetings.
- Patient Loyalty efforts.

Volunteer’s Individual Record:
- Application.
- Interview summary.
- Reference letters.
- Background Checks.
- Service guideline/position description.
- Competencies.
- Department Specific Training.
- Population/Age Specific Training (where applicable).
- Documentation of Orientation.
- Annual Requirement Education.
- Performance reviews.
- Updates.
- Recognition.
- Correspondence.
- Coaching
- Termination.
- Exit interview.
- Letter of resignation (if possible).
Other records include:

- Health Records (maintain as separate confidential files from the volunteer personnel file).
- Education other than Orientation and Annual Education.
- Mailing Lists.
- Talent and Skills Bank.
- Schedules of Volunteers by Service Assignment.
- Recognition.
- Hours of Service Statistics.
- Statistics of Work Accomplished.
- Publicity.
- Budget.
- Annual Report.
- Gift Shop Records.
- Fundraising Reports.

Record Retention

Most organizations have a policy that establishes record retention based on legal requirements and the institution's needs. Although you should consult your organization’s Human Resources Department, Risk Management, financial officers, and possible legal counsel, the following guidelines may be helpful:

- Records to be kept permanently:
  - Annual reports
  - Bylaws
  - Standing Rules
  - Membership records
  - Volunteer Statistics
  - Newsletters
  - Minutes of meetings
  - Audited financial statements
  - Contracts and leases
  - Income tax returns
  - Bookkeeping journals and ledgers
• **Records requiring limited retention:**
  
  - Significant internal memos/correspondence (two years)
  - Official/formal external correspondence (two years).
  - Deposit slips/statements (three years)
  - Receipted bills (three years)
  - Treasurer's reports (three years)
  - Committee reports (three years)
  - Legal correspondence (five years)
  - Annual budgets (five years)
  - Canceled checks (seven years)

• **Current records:**
  
  - Inventory
  - Location of organization-owned equipment
  - Financial policies/guidelines.

• **Volunteer records:** Items outlined on the previous page.

**Additional guidelines pertaining to volunteer records:**

- Documentation of involuntary termination should be kept for the statutory period appropriate to the locale in which a torte action could be filed against an organization.

- Attendance records should be kept for the same period of time. These can be used to prove or disprove a volunteer's presence in any action involving a volunteer participant or witness to an occurrence.

- Documentation of counseling should be kept for one year only.

- Junior volunteer records should be kept for a minimum of five years if letters of recommendation for college or employment have been promised.

- Some volunteer programs retain volunteer application files indefinitely because requests for program participation verification continue to come in years after the volunteer has left the program.
Tax Deductions for Volunteers

• The IRS pamphlet #526, *Income Tax Deductions for Contributions*, outlines deductions for volunteers.

• The volunteer administrator should keep a current copy of this publication on file.

• Volunteers are allowed to deduct un-reimbursed expenses if the services were provided for a not-for-profit 501 C (3) organization.

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<th>Allowable Tax Deductions for Volunteers</th>
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<td>Parking and toll fees</td>
<td>Dependent care expenses</td>
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<td>Required uniforms</td>
<td>Gifts to individuals</td>
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<td>Auxiliary dues</td>
<td>Value of blood donations</td>
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<td>Telephone calls</td>
<td>Auto repairs and maintenance</td>
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BUDGET PLANNING

The Director of Volunteer Services (DVS) is responsible for justifying the resources, tools, space, staff, and budgetary support for department operations.

The budget process is a product of the overall mission and issues of the health care institution. A budget should be as accurate as possible and be a realistic estimate of the cost to operate and maintain the volunteer program. In order to have a voice in the process, the DVS must understand the present climate, the corporate character or "personality," demands and pressures from outside the institution and the competing pressures within the organization.

The DVS must take responsibility for planning each year for the expected needs, growth, and services of the department. The careful manager will control spending to be in keeping with changing influences on the institution. The word "flexibility" is more important here than almost anywhere else.

If the DVS has limited accounting and financial skills, a mentor within the institution can prove very helpful particularly if the mentor is connected with the Finance Department. It is this mentor who can advise the DVS on how the corporate culture affects the budgeting process. The DVS with limited accounting knowledge would be well advised to take basic accounting courses to build his/her knowledge base. Some institutions offer budgeting summary classes for their “financially-challenged” managers. The basics are easy to learn.

Budgeting requires good communication skills. The DVS must be able to adequately defend the budget both verbally and in writing with concrete information. Be prepared to put your proposal in writing in a persuasive and clear fashion. The most important person, from whom you must get direction and support, is the person to whom you report.

Categories for Budgeting:

There are generally two types of budgets:

- Operating Budgets
- Capital Budgets

Organizations establish a dollar threshold for determining capital expenditures and requests are processed separate from operating budgets.

When developing an operating budget for the volunteer services department, you need to include all possible expenditures. Review all accounts thoroughly. It is better to over-project versus under-estimate. Reviewing the prior year's
expenditures and monthly allocations for those expenses is a vital part of the budgeting process.

Each institution has its own style and procedure for budgeting. The better your skills are in budgeting and justifying your needs, the more influence you will have over your success.

**Forecasting**

Some healthcare organizations utilize forecasting for budget preparation and monitoring. Forecasting calculates in advance, the projected costs of the programs goals and objectives. These projections are based on actual data and analyzed trends, not previously budgeted dollars. Future planning is not just based on inflationary numbers. Trends over a specified period of time are examined and used to determine future projections. Budget decisions need to be from a strategic perspective to avoid poor decisions and unrealistic expectations. It is important to compare the actual expenditure and revenue results to the forecast on a quarterly and year to date basis.

Creating a line item budget can provide an accurate picture of the expenditures in the volunteer department. Line item budgets are more detailed and separate expenses into categories, such as supplies, recognition, equipment and salaries.

**Categories of Line Items Examples:**
- Office Equipment
  - Furniture, equipment, software, storage
- Supplies
  - Office supplies and maintenance
- Utilities, i.e. telephones, cell phones, etc.
- Printing and copying costs
- Postage
- Insurance
- Recognition, retention, recruitment costs
- Education/Professional Development
- Registrations costs
- Dues
- Travel / mileage
- Dietary costs
- Outside services
- Books, magazines and subscriptions
- Service recovery
- Community Relations
- Marketing/Public Relations costs
Assessing Your Staff Mix – Paid versus Unpaid

Look at your present paid staff in terms of cost and productivity.

♦ Does your salaries budget cover the skilled workers needed to adequately meet the department’s required tasks?

♦ Describe your volunteer staff (the ones who report directly to you serving volunteer services department needs).

♦ How does your volunteer staff supplement the work of paid staff?

♦ Staff resources: Has your department staff been increased or decreased in the past year? Do you share staff with other departments?

♦ What changes in staffing would you implement?

♦ What can you do to make those changes possible?

We are all faced with having to do MORE with LESS. Keeping the best volunteers for you is not a bad practice---it may be your best survival strategy!

Which changes can be made without budget increases?

What needs are not met at this time and need to have a budget allocation to be resolved? Is it a capital budget expense? (Usually over $500-$5,000)

Which concerns are possible to change? How would you go about this?
FUNDRAISING

Reports and Accounting

Detailed records must be kept for all fundraising activities. Reports regarding fundraising include information:

- Listing of fundraising activities
- Gross amount raised
- Development costs
- Net profit
- Number of volunteers involved
- Service Hours Contributed
- Donations
- Distribution of funds
- Overall outcome of events
- Tax collected and paid to government agencies

Fundraising Planning and Supervision

Many volunteer administrators have either direct or indirect responsibilities for fundraising events for their institutions. Indirectly, they may oversee the efforts of auxiliaries whose primary functions are raising monies through special events.

It is helpful to identify a specific item, project or program that will benefit from the fundraising. The event must identify a need and be viewed as important enough to attract attention. For recurring events, be sure to advertise the successes of previous fundraising efforts, such as items purchased, number of patients who benefited, dollars donated, etc. People like to be assured that the event will be successful and how their donation will make a difference.

Some questions the fundraising body should ask themselves when planning an event are:

What do we have? What do we need?
How can we get what we need? Who has what we need?
Who gives? Who gets?

The most important part of fundraising is to develop a plan for each event:

WHAT?

- Determine the purpose for the event
- Set a financial goal.
- Decide what staff and volunteers will be needed.
- Develop a publicity and marketing plan
- Establish a budget
WHO?
- Appoint a planning committee
- Include appropriate staff members in planning
- Assign volunteers for pre-event tasks
- Delegate tasks for volunteers at the event
- Make assignments for clean up and follow through after an event
- Select finance volunteers to manage the books, deposit the funds, and disperse net proceeds
- Appoint a secretary to record and send minutes/agendas.
- Delegate responsibility for staff or volunteers to promote the event.
- Determine who will write and send thank you letters for contributors and participants.

WHEN?
- Prepare timelines for planning, hosting and evaluating the event
- Set deadlines for ordering supplies
- Develop timeline for public relations
- Check for non-competing dates with other community fundraisers
- Book the location well in advance of the event

WHERE?
- Select a suitable location that is interesting, accessible and affordable

HOW?
- Evaluate type of event that will be successful in the community
- Develop service guidelines for volunteers
- Give previous reports to planning committee

Additional Information:
- When organizing the event planning committee, be sure to select members who bring experience and a diverse set of skills and expertise. Create service descriptions that ensure committee members are clear on the expectations and time commitment of the position. Ensure committee members have contact information for other members of the team.

- Checklists are essential tools in event planning. They provide a step-by-step guide and working tool throughout the event. Checklists should include dates, responsible parties, roles and responsibilities and work to be performed.

- Be sure to plan a wrap-up meeting to celebrate the event and to identify areas of opportunity for the next event.
Records Management, Budget and Fundraising  
Summary of Key Points

- Good record management assists in validating the significance of volunteers to the organization's goals.
- The DVS must have a keen sense of where the organization is heading as a premise to sound budgeting practices.
- The overall budget needs to be justified with concrete, accurate evidence of output (what the organization is getting for the dollars spent.)
- Fiscal accounting is necessary to maintain accurate records and to safeguard monies collected on behalf of the organization.
- Focus department resources where they will have the greatest impact and report results through outcome measures.

Joint Commission Implications

☑ Anything required by the Joint Commission needs to be supported by some form of documented record of compliance. Anything you have in policy needs to be supported with evidence of compliance.

Technology Tips

☑ There are many volunteer services data software programs available to electronically manage the volunteer program and department. They range from the basic contact management types to multiple sophisticated kiosk sign-in and messaging systems connected through a network.
TECHNOLOGY

The use of technology in volunteer management is a must for effectively and efficiently managing a program in today’s health care environment. The first step for volunteer directors is to perform an assessment as to where you are now, where you need to be and what resources it will take to get you there.

Survey your peers throughout your city/state for recommendations on data base management programs, taking into consideration the size and complexity of your program. Consider company reputation for quick, reliable service and on-line support when making decisions on which program to buy.

Examples of data base management programs:
- ROVIR (Retriever of Volunteer Information & Reporting)
- Volgistics (Web-based)
- VolTrac (PC or web-based)
- Volunteer Reporter
- Other means to manage volunteer information is through Microsoft Excel spreadsheets and Microsoft Office Access

Remember that technology requires ongoing education. Contact your Information Systems Department or Training Department to sign up for as many software applications classes as possible.

Calendar and hand-held electronic scheduling databanks (such as Blackberry and Palm Pilots) are very useful to the DVS. They sync (link up) with your scheduling program (such as Outlook) on your desktop.

- You can immediately check your appointments or let the machine sound an alarm to remind you. Even if either your hand-held or your desktop system goes down, you can easily reload your data from the working machine.

- With a machine you hold in your hand or tuck in a pocket or purse, you can manage thousands of contacts in your address book, download your email, add up and record your expenses, add to a “Things To Do List” and even type in documents in the “Notes” function. It will even use an infrared beaming system to transfer data from two palm devices without any external connections.

- In the future, these mini-computers will become even more indispensable replacing the bulging calendar books that we all have carried in the past. The technology maxim is “Information is Everything!” Savvy DVSs will make technology work for them and their programs.
In the past, budgeting was a weeks-long process because of the manual calculations necessary to project expenditures for the coming year. Now, many financial professionals use pre-formulated spreadsheets that automatically calculate the routine mathematics functions once the raw numbers are entered into the cells of the spreadsheet. These programs and tables can be a tremendous benefit to the DVS.

Software programs can help design flyers and promotional materials for fundraising events.

Broadcast emails can be used to publicize the events and report successful outcomes.

Utilize organizations websites to advertise volunteer opportunities and market the volunteer program.
Questions to consider in the use of current technology:

- How are you currently using technology?

- Are you using the resources available in your organization?

- Do you use your web page for on-line recruitment (application process)?

- Do you use your intranet for annual education and orientation?

- Do you use a touch screen for volunteer sign-in and messages?

- Are you using a Blackberry for accessing email, calendar, and phone functions?

- Do you use a Blue Tooth earphone for hands-free conversations?

- Are you blogging to communicate?

- Are you participating in list servs?

- Is your volunteer newsletter provided on-line?

- Is email used to communicate with volunteers?
Technology
Summary of Key Points

- Be prepared for the unexpected with a Disaster plan for the department
- Use of Internet and Intranet resources for information and recruitment should be a program standard.
- Use of Internet resources to bring in the non-health care perspective provides an even greater opportunity to learn and grow in the field.
- Utilize technology to assist with project management

Joint Commission Implications

- No direct implications for Joint Commission.

Technology Tips

- Implementing technology into volunteer management creates efficiency, standardizes operations and improves productivity. Opening your mind to the many opportunities of technology will place your volunteer program at the forefront of volunteer management.

- There are many volunteer services data software programs available to electronically manage the volunteer program and department. They range from the basic contact management types to multiple sophisticated kiosk sign-in and messaging systems connected through a network.

- Project management software products, like Microsoft Project, are great tools to assist with project planning.
OUTREACH, PUBLIC RELATIONS, AND NETWORKING

Outreach

Outreach activities offer the opportunity to demonstrate to the organization yet another avenue in which volunteers support and promote the healthcare system. Engaging in outreach activities can enhance the volunteer roles of a department and provides another mechanism for recruitment. Volunteer directors should seek out opportunities to reach out to the communities they serve, enabling volunteers to be ambassadors for the organization. Work with your community outreach, public relations and business development specialists to identify events and opportunities to advertise the volunteer program. Internal and external communication departments are useful resources to promote events, highlight volunteers and educate readers on volunteer services.

Volunteer directors should search for opportunities to partner with local organizations, businesses and clubs on similar interests and to address a community issue or concern. Capitalize on these ventures by including information about the volunteer program in the publications and media coverage.

Public Relations

Successful volunteer programs need to utilize the organizations public relations and/or marketing departments as a communication tool to publicize and support volunteer services. The role of the public relations and marketing departments may vary between organizations. Public relations activities usually entail promoting the organizations goodwill toward internal/external customers, staff and the community. Marketing efforts are often geared toward the promotion of goods and services.

The role of the volunteer director is to connect the activities of the volunteers with the interests of the organization and the community, in order to create promotional opportunities. Examples include the following:

- Fundraising events, especially if they are tied to an effort such as, breast cancer, childhood diseases, or a community need
- Gift shop promotions
- Patient satisfaction activities
- New volunteer programs
- Community outreach activities
- Special recognitions or awards bestowed on a volunteer, a group of volunteers, or volunteer staff
Avenues for promoting volunteer services vary among organizations. In larger organizations, it may be a challenge to get promotional opportunities due to the volume of requests the public relations/marketing departments receive. The volunteer director will need to be creative in finding opportunities. The following are examples of avenues for promoting volunteer programs and activities:

- Promotional materials, such as brochures and flyers
- Radio
- Television
- Newspapers
- Internal/External Newsletters
- Community Organizations, Churches and Clubs
- Internal/External Web Pages
- Chamber of Commerce publications

It is important for the volunteer director to work with the appropriate departments within the organization to ensure proper protocol is followed and to build a relationship with those departments.

**Networking**

Volunteer programs and professionals need to continually find opportunities to address the ongoing changes in demands, expectations and challenges. Networking with other professionals in volunteer-focused programs and organizations offers a resource for program ideas, support and professional development.

- Professional organizations such as the Association for Healthcare Volunteer Professionals (AHVRP) enable Directors of Volunteer Services to network with colleagues across the country.
- Local and state Directors of Healthcare Volunteer organizations provide volunteer directors a resource within their community or state.
- Volunteer centers provide opportunities to network with volunteer programs outside of healthcare.
- Technology offers opportunities to network with professionals via Web Pages and social networking sites such as Face Book, Twitter, and Linked In.
Outreach, Public Relations, and Networking

Summary of Key Points

- Learning all you possibly can about current trends in health care and quickly responding to the changes will give you credibility as a manager and help to secure your role and the value of volunteer services for the future.

- Focus department resources where they will have the greatest impact and report results through outcome measures.

- Choosing an organizational model that “frees up” time for innovative program design and re-design is critical to your success and effectiveness as a Director of Volunteer Services.

- Networking with peers in the healthcare field continues to provide the DVS with the greatest opportunity to gain new insights and to benchmark best practices.

Joint Commission Implications

☑ No direct implications for Joint Commission.

Technology Tips

 Mastering current technology is a critical success factor for the volunteer administrator.
Professional Development Resources

Note: The reference for quoted text is the organization’s website.

Community Service and Affiliations

- Organizations
- Public Speaking (Toastmasters, Association of Training and Development, National Speakers Association local chapters and national meetings)
- Teaching and Training
- Volunteering
- Local executive board involvement

Credentials and Knowledge

- Building a Knowledge Base
- Establishing Expertise
- Continuing Education
- Tapping Published Resources
- Professional Awards

Publishing

- Writing for Publication
- Editing Newsletters and Other Materials
Certified Administrator of Volunteer Services

CAVS status provides both internal and external rewards. CAVSs enjoy the pride of recognition of being among the elite in a critical field of healthcare. And CAVS is a premier credential based on a sound assessment that provides distinction in an increasingly competitive marketplace.

The CAVS Program has three components:

- Eligibility requirements that are a blend of education and experience and profile the individual who is likely to be successful on the Certification Examination.

- 110-item multiple-choice Certification Examination that tests tasks that are performed regularly in practice and are considered important to competent practice.

- A renewal requirement. Certification is valid for three years at which time it must be renewed through retaking and passing the Certification Examination or documenting 45 contact hours of continuing professional education.

Candidate Handbook and Application

The CAVS Candidate Handbook and Application contains eligibility requirements, a complete content outline for the Examination, instructions on applying for the Examination, and an application. Download the pdf file of the CAVS Candidate Handbook and Application.

Renewal Application

The CAVS Renewal Application includes criteria for acceptable continuing professional education. Download the CAVS Renewal Application Form.

Source: American Hospital Association Certification Center
Professional Organizations

- **Association for Healthcare Volunteer Resource Professionals (AHVRP)**
  - [www.todaysvolunteer.org](http://www.todaysvolunteer.org) (formerly ASDVS)

**AHVRP 2008-2010 STRATEGY MAP**

**VISION**

AHVRP: the Preeminent Leader in Healthcare Volunteer Administration, enabling all volunteers to reach their highest potential in serving the health care needs of the nation

**AHVRP MISSION**

AHVRP leads, represents and serves its members and healthcare volunteers who are accountable to their healthcare facilities and to the community, and meet healthcare needs.

**AHVRP VALUES**

People        Integrity        Leadership       Innovation       Diversity
Growth and Development       Collaboration

**GOALS**

**LEADERSHIP**

- Create a fluid, flexible and responsive organization.
- Create and maintain a member and user-focused organization.
- Broaden and diversify the membership base.
- Develop current and future leaders
- Implement education and services that will engage next generation members.
- Shape the profession.
- Optimize organizational effectiveness.

**ADVOCACY**

- Support AHA strategies.
- Build strategic alliances with organizations that advance the profession and advocate volunteerism.
- Advocate the value of volunteer administration.

**COMMUNICATIONS**

- Develop and maintain a website that is informative, easy to navigate and up-to-date.
- Develop and implement cutting-edge communications vehicles.
EDUCATION
- Develop education programs and products that meet the needs of current and expanded membership base.
- Identify and utilize member skills that meet the needs of the profession.
- Provide accessible education.

STANDARDS
- Promote certification and renewal.
- Interpret legislative and regulatory standards for healthcare volunteer administration.
ASSOCIATION FOR HEALTHCARE VOLUNTEER RESOURCE PROFESSIONALS

CODE OF ETHICS

Members of the Association for Healthcare Volunteer Resource Professionals of the American Hospital Association recognize the importance of providing support services for patients and volunteer opportunities for citizens to participate effectively in healthcare delivery. Members are committed to administering volunteer programs which embrace the following values.

- The Director of Volunteer Services demonstrates a personal commitment to volunteerism and is a dedicated advocate for it.

- The Director of Volunteer Services ensures that the volunteer program reflects the institution’s mission.

- The Director of Volunteer Services is proficient in human resource management, including a clear understanding of legal parameters and respect for individual competencies.

- The Director of Volunteer Services protects the confidentiality of patients, volunteers, and staff.

- The Director of Volunteer Services respects the importance of advocating for patient and volunteer rights.

- The Director of Volunteer Services adheres to standards of practice which reflect credit upon the profession.

- The Director of Volunteer Services pursues knowledge in order to attain professional excellence.

- The Director of Volunteer Services shares the ideas and communicates knowledge in order to advance the field of volunteer management.

- The Director of Volunteer Services participates, actively supports, and assumes leadership roles in professional organizations in volunteer management.

- The Director of Volunteer Services maintains high standards of personal integrity at all times.

December 1987
AHVRP Resources

- AHVRP Certification (CAVS: Certified Administrator of Volunteer Services) administered under the American Hospital Association Certification Center and CAVS Review Guide

- Extraordinary Programs (showcased at the national conference)

- HAVE Awards (American Hospital Association National recognition for outstanding Volunteer Programs)

- AHVRP Code of Ethics

- AHVRP News You Can Use (bi-weekly e-publication)

- List Serv and AHVRP-DVS Digest (condensed version): DVS questions asked and answered via an E-mail List Serv

- Opportunities for Service (Volunteer on AHVRP committees)

- National Education and Leadership Conference

- Principles of Volunteer Resource Management Course (6-hour workshop) also available in 6 ninety-minute webinars

- CAVS Certification Review Course (offered at national conference)

- Partners In Community Health (PICH) Electronic Quarterly Newsletter

- Health Adventures Information (targeted at-risk youth to learn about health careers)

- Legislative and Workforce Advocacy

- Volunteer Administration Best Practices Information

- Products and services

- State and Regional Network

- Career Opportunities (careerbuilder.com and career center on website)

- State, Regional and National conferences
- AHA Committee on Volunteers (American Hospital Association Specialty Committee)
- State Auxiliary Leaders (SALs) Best Practices and Workshops
- **MyCareCounts.** A 2007 nationwide effort to keep quality health care in our communities. American Hospital Association (AHA) Communicate with Congress to oppose any cuts that could threaten the health care you depend on. [www.mycarecounts.org](http://www.mycarecounts.org) or [www.todaysvolunteer.org](http://www.todaysvolunteer.org)
- **A “Me Only” online toolkit is under development** by the AHVRP Education Committee. This tool will support the DVS in advocating for his/her leadership position within the organization. An on-line survey was sent to the AHVRP members in April, 2008 requesting feedback to assist in the development of this tool kit.
- Health for Life: Better Health, Better Health Care (Framework for Health Reform) [www.aha.org](http://www.aha.org) or [www.todaysvolunteer.org](http://www.todaysvolunteer.org)

**American Hospital Association (AHA) [www.aha.org](http://www.aha.org)**
- **AHA Resources** 800-AHA-2626 or [www.ahaonlinestore.com](http://www.ahaonlinestore.com)
  - **HAVE Awards** (American Hospital Association National recognition for outstanding Volunteer Programs)
  - **AHA Committee on Volunteers** (American Hospital Association Specialty Committee)
  - **Health for Life: Better Health, Better Health Care** (Framework for Health Reform) [www.aha.org](http://www.aha.org) or [www.todaysvolunteer.org](http://www.todaysvolunteer.org)

**Association of Volunteer Resources Management (AVRM) formerly Association of Volunteer Administration (AVA) [www.avrm.org](http://www.avrm.org)**
- National meeting and local informal networking

**Points of Light [www.pointsoflight.org](http://www.pointsoflight.org)**
- Volunteer Centers National Network
- **Affiliated Programs**
  - RSVP (Retired and Senior Volunteer Program)
  - Volunteer Action Centers
**DOVIAs**

- Directors of Volunteers in Agencies (local or regional professional associations for volunteer resources managers (VRMs))

**Independent Sector**  [www.independentsector.org](http://www.independentsector.org)

- “A coalition of corporations, foundations, and private voluntary organizations that works to strengthen America’s nonprofit organizations”
- Statistics about the value of volunteer time, both for the United States as a whole and for individual states.
- [www.independentsector.org/programs/research/volunteer_time.html](http://www.independentsector.org/programs/research/volunteer_time.html)

**VolunteerMatch:**  [www.volunteermatch.org](http://www.volunteermatch.org)

- Online national network that matches up volunteers with participating non-profits.

**PROFESSIONAL DEVELOPMENT PUBLICATIONS**

**Association for Healthcare Volunteer Resource Professionals (AHVRP),** 1 North Franklin, 31st Floor, Chicago, Illinois 60606.
Tel: 312-422-3939.

**Constant Readiness:**

**Recommended Practices for Joint Commission Standards**

Volunteer Resource Professionals get responses to unanswered Joint Commission questions and more when reviewing the past, present, and future standards discussed in Constant Readiness. Mary McCormack reviews the 2009 standards for applicability to volunteer services administration and offers practical options for understanding and complying with Joint Commission expectations. This publication is equipped with over 200 pages of insightful information covering 69 Joint Commission standards and professional development resources. Volunteer administrators will gain a must-have reference tool and assistance in achieving a level of Constant Readiness.

Catalog # 200820
$99 AHVRP members
$139 Non-members
**CAVS Review Guide - 2nd Edition**

The CAVS Review Guide 2nd Edition offers you many professional development resources that can both help you prepare for the national certification examination and improve your current program. The 200+ pages guide follows the national certification examination content outline and features 48 content sections. The guide provides the 2009 National Patient Safety Goals, a brief overview of the 2009 Joint Commission standards, practice questions, excerpted text from major volunteer resource professionals’ publications and an expanded professional development resource listings.

CAVS Guide Catalog # 200810  
$99 AHVRP members  
$119 Non-members

**Assessment of the Department of Volunteer Services in a Health Care Institution - 3rd Edition**

Identify the elements of successful volunteer management using this tool in electronic or hardcopy to evaluate the effectiveness of the department of volunteer services. Results will provide a definitive assessment to determine how effectively the department identifies the needs and meets the goals of a healthcare provider and its volunteers.

Assessment of Dept. Catalog #202210  
$45 AHVRP members  
$65 Non-members
Legal Risk and JCAHO Issues for the Healthcare Organizations

Legal, Risk Management and JCAHO Issues for Healthcare Organizations is a 118-page publication. Prepared with the AHV RP member and auxiliary leader in mind, it includes information on the legal issues impacting healthcare volunteerism all in one text.

Legal Risk and JCAHO Issues.
Catalog # 178552

$40 AHVRP members
$60 Non-members

Legal Manual Addendum- Volume 1

Volume I of the Legal Manual Addendum covers JCAHO and Risk Management for Volunteer Healthcare Organizations. Included is fourteen (14) chapters covering new information about JCAHO, HIPAA, tax issues, EMTALA and Disaster Preparedness.

Legal Manual Addendum Catalog #202202
$40 AHVRP members $60 Non-members

The Legal Bundle


Legal Bundle Catalog #202203
$70 AHVRP members
$80 Non-members purchase
In a Nutshell - A Comprehensive Resource for Healthcare Volunteer Management

In a Nutshell - A Comprehensive Resource for Healthcare Volunteer Management. This exciting, up-to-date, comprehensive resource replaces the former Rx for the Volunteer Services Administrator and is your answer to these questions. With this user-friendly complete support system, volunteer services administrators can create an individual, customized volunteer program. Both the new and seasoned volunteer will benefit from 200 plus pages of expansive information, sample documents and templates. This valuable tool available in printed book and CD format also includes resources for professional career development for those who have chosen a career in volunteer administration.

Catalog# 200830
$99 AHVRP members
$119 Non-members

Blue Print for Recognition

The Blue Print is a 304 page publication compiled of tools to assist volunteer leaders in honoring volunteers within their organizations. Recognition enables us to privately or publicly applaud the efforts of the special people who without compensation provide countless hours of service to our organizations each and every day. Use AHVRP’s “Blueprint for Recognition” as a guide for discovering ways to honor our nation’s Healthcare Volunteers.

Blue Print Catalog # 202139
$60 AHVRP members
$75 Non-members
The Joint Commission:

www.jointcommission.com

- Accreditation manuals (standards, scoring information, aggregation and decision rules, and accreditation policies and procedures), books, periodicals, software, and other products that help health care organizations ensure patient safety, measure, assess, and improve their performance, and participate successfully in the accreditation process

- Topics: “patient safety, performance measurement, performance improvement, pain management, evidence-based medicine, staff competence, environment of care, survey preparation, conducting self-assessments and mock surveys”

- MANUALS:

  - 2009 Comprehensive Accreditation Manual for Critical Access Hospitals (CAMCAH)


  - 2009 Hospital Accreditation Standards (HAS)

  - 2009 Accreditation Process Guide for Hospitals


Non-Profit Risk Management Center


Governor's Office on Service and Volunteerism
300 West Preston Street, Room 608, Baltimore, MD 21201, 410-767-1216

- http://www.gosv.state.md.us/volunteerism/bestprac/sec01.htm Best Practices for Developing A Volunteer Program (ten chapter free document)


- 48 -


- Stern, Gary J. *Marketing Workbook for Non-Profit Organizations Volume 1: Develop the Plan*. Wilder Foundation.


**Energize, Inc.**

5450 Wissahickon Avenue, Box C-B, Philadelphia, PA 19144
(215) 438-8342 [http://www.energizeinc.com](http://www.energizeinc.com)

Extensive list of books, e-books, and tool kits.

- [E-volunteerism.com](http://www.energizeinc.com) The electronic journal of the volunteer community, Annual subscription or articles may be purchased separately


- *Beyond Police Checks*, Linda Graff

- *From the Top Down: The Executive’s Role in Volunteer Program Success, Revised*, Susan J. Ellis, 1996.


- *(HELP!) I Don’t Have Enough Time Guide to Volunteer Management*, Katherine Noyes Campbell and Susan J. Ellis


Resources: Members only (requires login) 152 topics including:

- 101 Ideas for Volunteer Programs, Steve McCurley and Sue Vineyard
- 101 More Ideas for Volunteer Programs, Steve McCurley and Sue Vineyard
- 101 Ways to Raise Resources, Sue Vineyard and Steve McCurley
- Beyond Banquets, Plaques & Pins: Creative Ways to Recognize Volunteers and Staff, Sue Vineyard
- Handling Problem Volunteers, Sue Vineyard and Steve McCurley
- How to Take Care of You So You Can Take Care of Others
- Marketing Magic for Volunteer Programs, Sue Vineyard
- Measuring Up: Assessment Tool for Volunteer Programs, Steve McCurley and Sue Vineyard
- Megatrends and Volunteerism: Mapping the Future of Volunteer Programs, Sue Vineyard.
- Secrets of Leadership of Motivation: How to Get and Keep Volunteers and Paid Staff, Rick Lynch and Sue Vineyard.
- The Volunteer Recruitment Book, Susan J. Ellis.

The International Journal of Volunteer Administration (IJOVA)
(New generation of the former Journal of Volunteer Administration)
www.ijova.org
Professional Development Resources
Summary of Key Points

➢ The world of volunteer administration is constantly changing, and to advance in the profession the DVS must stay well “connected” with outside resources.

➢ Use of Internet resources to bring in the non-health care perspective provides an even greater opportunity to learn and grow in the field.

Joint Commission Implications

☑ No direct implications.

Technology Tips

☒ The DVS can access volunteer services administration Website from all over the world by using search engines. We are truly a global community linked electronically with different countries, cultures and people.

☒ ListServs are ways that groups with common interests share information in a question/answer type of format. They are usually updated weekly and provide valuable information for those who read and contribute to the knowledge base.

☒ Through the Internet, the DVS can access information regarding upcoming conferences and seminars to update skills and talents.
Congratulations! You’ve learned many things participating in this course. No one can do everything at once. Some sample process improvement ideas are provided to get you started.

Most importantly:

- What will you do in the first 48 hours upon returning to work?

- How will you prioritize the ideas for process improvement that you learned today?

Your Personal Action Plan will help you to prioritize the program areas you wish to review and revise.

**Priority 1:** Rank your highest priorities for implementing needed immediate change in your program.

**Priority 2:** Rank areas of change/review that are important, but must come later.

**Priority 3:** Rank areas of change/review that would improve your program, but are not designated as critical needs.
### Module 6: Technology, Tools, and Professional Development

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